



User Manual

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Principal Toolbox User Manual

Principal Toolbox 6.5

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1 Introduction to the Principal Toolbox

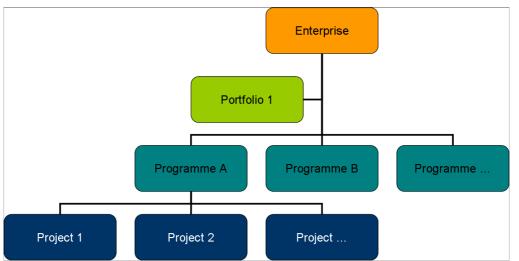
Principal Toolbox offers a powerful set of tools for the management of your projects, programmes and portfolios. PRINCE2[™] support for projects is offered in project models and in the way processes are supported by the Principal Toolbox by default. Customising Principal Toolbox to follow the processes 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 help is available in the right top location. You can access the help by clicking the 'Help' link. This will open the help pages available online (not integrated within the Principal Toolbox).

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

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.

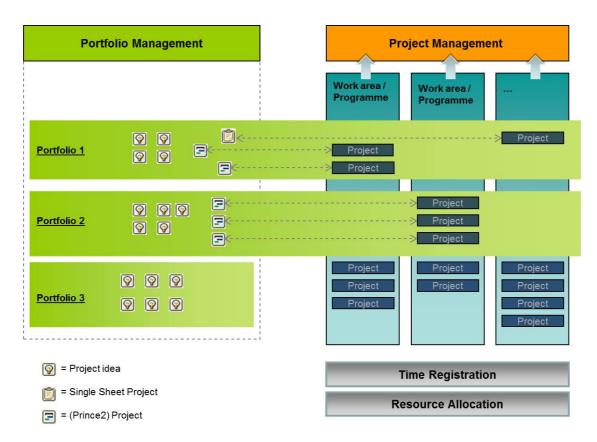
The folders can be any of the following types:

- 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</u> [88]).

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



1.2 Hardware and Software requirements

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

Requirements for general use:					
Memory	B or more				
Browser	licrosoft Internet Explorer 8 or later, FireFox or Google Chrome ^{1, 2}				
Display	Resolution 1024x768 or higher				
Requirements for using reports and exports:					
Software	Microsoft Office 2003 or later ³				
Software	Adobe Acrobat Reader				

If you experience problems while accessing the Principal Toolbox, please verify <u>security settings</u> of your browser.

- 1. Be sure there are no script blocking security settings or script blocking firewalls active.
- 2. Other browsers are supported based on best effort, issues may exist.
- 3. For working with automated reports in Excel, the template needs permission to execute macro's. Excel 2003 is only supported using the old reporting template. Reports based on the new report template (as of release 6.5) require Excel 2007 or later. This new report template supports Office for Mac as well.

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.
Downloa	ds		
	Automatic prompting for file downloads	Enable	Functions like pack project offline can't offer to download the offline project.
	File download	Enable	When disabled, automated reports and documents can't be downloaded.
Miscellar	neous		
	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. On maximum security 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.
	Allow META REFRESH	Enable	Internet Explorer window stays blank 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
	Submit non-encrypted form data	Enable	When disabled, Internet Explorer can't update changes in text fields.
Scripting			
	Active scripting	Enable	Login button on login screen does not 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

Other problems might be related to the use of virus scanners, firewalls or browser add-ons, like the Google toolbar which also has 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.

1.4 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.

Note: As of release 6.1+ the browsers 'Back' button may be used as well.

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.

Get www.principaltoolbox.com		- 0	× ★ ⊕
File Edit View Favorites Tools Help		UU	~~~
	Erik Aalbersberg 👻 Hel	p Support	Setup -
Projectmanagement > IT Department > IT Change projects > Venus Project Dashboard Properties Product Breaking Plan Gantt Resource Management • Documents • Portfolio Report Reports Guide Plaza Project: Venus Project Edit Properties Edit Members	Pack Project Offline		q
Objective: Realisation of the Venus system Project statuto Project initiation Stage 1 Stage 2 Stage 3 Project closure Organisation: Abert Swank Status: Inventarisatie en voorbereidingsfase Project closure Info: Info: Intercomparisation: Intercomparisation:			
O Project Board O Project Manager O Team Members			Ŧ

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

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.

ne Portfolio Manageme	nt Projectmanager	nent Resource /	Allocation Time Ei	ntry Prince2	FAQ Project Plaz	a Import / Export				Erik Aalbe	rsberg 🔻 I	lelp Suppor	t Sel
Approve Hours N	ly Time Sheets												
lome								Customise Pag	e Text	Customise Hom	e Page E	dit Widgets	Q
Drin	in al												
Princ	IDal	14/-1		h	(1)							
		weicome	on your personal										
Toolb		Here you	have access to info been assigned to y			ucts and other business							
ΙΟΟΙΟ	ОХ	tildt fidve	been assigned to y	ou such as iss	ues, risks, actions	and unresneets.							
10010													
								$\left(\right)$					
Ay open time sheets						Documents to be app		(3)					
Veek 🛛 Start Date 🌲		me Sheet Rem latus	arks by Owner	Time E	ntry Group	Document	Location	oje	ct		Date 🌲		
6 04-Feb-2013	Erik Aalbersberg N			ICT	\sim	Hoofdpuntenrapport.rtf Highlight Report.rtf	Highlight Rep Highlight Rep		Project Project		lay-2010 ug-2010		
7 11-Feb-2013	Erik Aalbersberg N			ICT	()	Yngnigni_Report.m	rightight Kep	оп Арон	riojeci	24-P	ug-2010		
8 18-Feb-2013	Erik Aalbersberg N	ew		ICT	(2)							
					\sim	Time sheets to be app	proved by me						
						Week Start Date	Owner	Rema	arks			ntry Group	
						4 21-Jan-2013	Erik Aalbersb	erg			ICT		
,						Curre	nt Stage Pr	ogress Gen			osts Proje	ct Manager(s))
pollo Project					_		ct initiatie		٠	• •		r Cole	
ffice 2010 Implementation							n-2013						
enus Project ealisation of the Venus sys	tom						t initiation		•	• •	Albe	t Swank	
eus Project	active and the second sec				~		1-2012	•		•	Erik	Aalbersberg	
						-		· · ·					
ly Products									Edit *	My Products		View Option	-
lame	Pr	oject		Owner	Review	ver Participant	te		Start	Draft	Checked	Final	110
roject Initiation Document (nus Project		Erik Aalber		dwards Albert Swa				012 19-Jun-2012			012
ly Actions		Edit	* My Actions	 +]	View Options -	My Issues			Edit *	My Issues	-	View Option	ns 🔻
Name	Project / Progra	mme Related To	o Due D	ate 🌲	-	Description	Project /	Programme Dec	sion	Due Date 🗧			
Externe hulp inschakel	en Apollo Project		iker is niet 06-Jur ar in gestelde	n-2010		5) printknopje op hoofd	ischerm Apollo P	roject App	roved	13-Apr-201)		
Planning aanpassen	Venus Project	2: planning	g loopt uit 12-Oc	1-2010	6								
Av Risks		Edit	* My Risks	-	View Options -	My Quality reviews			*	My Reviews	-	View Option	ns 🔻
Description			Due Date										

Home page

- 1. Area for general information.
- 2. Time sheets to be filled in and/or approved (add-on Time sheets)
- 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.

Edit Clos
 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
 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
 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)
Do not show work packages on my home page Show work packages of which I am an owner/reviewer/participant (includes view selectors)
Do not show products on my home page Show products of which I am an owner/reviewer/participant (includes view selectors)
Do not show activities on my home page Show activities of which I am a participant
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	es Archive Edit Pro	roperties Edit Members Edit Widgets 👿 🏚 🔾
Automated Reports Edit	Principal Toolbox Welkom op het Enterprise niveau van de Principal Toolbox! "Simply Fortes!"	2
Reports Projects Products Risks Changes Ouality reviews Actions Lessor/Hour Entlies System Resources Project Resources	Programmes / Project lists New Move	Archive View Options - View Options -
Entries Timeline Reports 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 Projectma	nagement Resource Allocation Time Entry Prince2 F/	AQ Project Plaza Import / Export			
Projectmanagement > IT Department > IT					
Dashboard Properties - Gantt & Dep	endenci & Knowledge Models Archive				
Project list: IT Change projec	ts 1		Edit Properties Edit Members	Edit Tolerances Edit Widg	gets 📓 🛔 Q
Name: IT Change projects		Welcome!		1	
Description: Change pr IT departs		"Keep it simple and straightforward!"	(6))	
Status:				Ø	
\smile					
Logs	Projects	New	Import Export Move Model Archive		▼ View Options ▼
Issue log	•		Current Stage Progress General		Project Manager(s)
R Risk log (4)	Apollo Project Office 2010 Implementation		Project initiatie	• • •	Peter Cole
A Daily / Action Io	Juno Project		Project opstart		Samuel Davies
	Back-up maken van alle vorige versies	(2)	23-Jun-2010	• • •	
Automated Reports	Omega Project		•	• • •	Jan Jansen
- Low	Venus Project		Project initiation		Albert Swank
Programma Rapportage	Realisation of the Venus system		30-Jun-2012	• • •	
	Zeus Project		🔴	• • •	Erik Aalbersberg
Reports					
Programmes / Project lists Projects	Project Models			Income	a Funcal Author
Projects	Name 🚖	\bigcirc	Objection	Impor	
Issues (5)	Klein Prince2 2009 project model		Objective Voor het managen en uitvoeren van een kle	ain project	Owner(s)
Changes	Software implementatie projectmodel	(7)	Prince2 project model for software impleme		
Quality reviews Actions	Standaard Prince2 2009 project model		Project model voor grote en/of complexe pr	ojecten	
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 57 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.

Role	 Assign programme manager(s) to a new programme Assign programme reader(s) to a new programme Manage roles at the enterprise level Access information of all programmes and projects Modify picture and text on enterprise dashboard Identical access rights as the Enterprise Manager Access information of all programmes and projects Identical access rights as the Enterprise Manager Access information of all programmes and projects 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 			
Enterprise Manager (enterprise = highest level in the programme hierarchy)	 dashboard Assign programme manager(s) to a new programme Assign programme reader(s) to a new programme Manage roles at the enterprise level Access information of all programmes and projects 			
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 	 on assigned level Create, move and archive sub-programmes Remove and restore archived projects, project models on assigned level 			

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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			
Time Entry Members Group Manager and Group Support	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

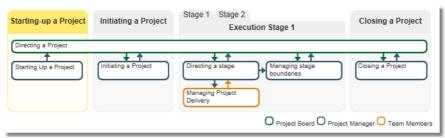
The active stage in your project is coloured yellow, the other stages are grey. It does not mean the other stages cannot be edited, it is an indication and used for filtering purposes in certain views. In the product checklist, stage names are shown in black. On the Gantt chart, stage bars are also shown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

Pro	ducts		Edit	Owner & Milesto	nes Edit	Project Plan	Set Base	eline	++	
Ð	Project start-up									
Θ	Project initiation									
		Owner	Start	Draft	Checked	Final	P' D'	IR	0	C A
	Project Initiation Document (PID)	John Edwards	04-Feb-2013			08-Feb-2013			-	
	Project Authorisation	-	11-Feb-2013			12-Feb-2013			-	
Θ	Eerste fase									
		Owner	Start	Draft (Checked	Final	PD	IR	Q	CA
	Work Package 1	John Edwards	15-Feb-2013		-					
	Product B	-	15-Feb-2013		-					
	Product C	-							-	
	Product A		-						-	
	Highlight Reports		-		-				-	
	Stage Plan update		-						-	
	Project Plan update	-			-				-	
	Next Stage Authorisation	John Edwards							-	
Θ	Project closure									
		Owner	Start	Draft (Checked	Final	PD	IR	Q	C A
	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	New spec. product	New man. product New man. product	Сору	produc
roject plan		Specialist Management Work pa	ickages	
- of oct prair		Product Breakdown	<<	>>
Project start-up	New	Product A		
Project Mandate	New	- Product B - Product C		
		T IOUUCE O		
Project initiation	Project plan			
Project Initiation Document (PID)	r toject plan			
Project Authorisation				
	Unassign			
Eerste fase	Unassign			
Work Package 1				
Product B	To rename, double-			
Product C	click on item.			
Product A				
Highlight Reports	To permanently remove items drag them into the trash can.			
Stage Plan update	urag mem mo me trash can.			
Project Plan update	Remove			
Next Stage Authorisation	Remove			
Project closure				
Follow-up recommendations				
Lessons learned report				
Project decommissioning				
	IIII			

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.

14 M.	iew Favorites Tools Help										
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	Properties Gantt & Dependencies Documents & Know	Andrea Madala Archiva									
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ct li	Principal Toolbox® (Demo) - Windows Internet Explore	r provided by Principal Too	olbox						×	Edit Widgets	× A
	Programme and Project Tolerances								Close		
iptic	Set tolerances										
	Enter the tolerances for the projects in this programme differently by setting alternative values in the list below		tolerances can be	e set in the first ro	ow. For specif	fic projects, the	tolerances ca	n be set			
	, -,										
	Tolerances can be set absolutely or relatively (per	centage based) for the foll	lowing dimensions	5:							
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	Shows whether or not the active stage is running to	behind or on schedule with									
	Shows whether or not the active stage is running to Product Planning	,								.	view Options
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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 project list see: <u>Setting tolerances</u> **5**

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> [142].

Reports									Close
Projects				fi		18	* All Proje	ects	View Options -
Name 🔶	Objective	Current Stage	Status	Status Description	Plann Status	Ho	ours Status	Costs Statu	s Project Manager(s)
Apollo Project	Office 2010 Implementation	Project initiatie	•	Status blijft op groen staan, ondanks toegenomen risico op late levering.	٠	•		•	Peter Cole
Diesel Project	Implementatie nieuwe workflow	Stage 1						•	Jan Jansen
Juno Project	Back-up maken van alle vorige versies	Project opstart			•			•	Samuel Davies

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:

Set filter	:	Define a filter to make a selection of the shown products / issues / etc.
Set columns	:	Add or remove columns from the view.
Set widths	:	Set the column width, so the view fits better on screen or in a report.
Advanced	:	 Define calculations on certain columns.
		 Show or hide column names
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 '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 142

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 Save View Manage Views *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.

 Global: Views can be us Local: Views can be use 	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.		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;

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.
 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).

			Save Cancel
Project Costs	Creator:	Albert Swank	
AR			
Global 👻			
	AR	AR	AR

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.

Note: As of release 6.5 it is possible to drag and drop documents from your local computer onto document lists within the Principal Toolbox

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 A 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**.
- 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.

ssue 16: Planning	will not make it					E	Edit Bad	(🖾	
Description:	Planning will not make it		Owner:	John Edward	da .				
Type:	Issue		Creator:	Erik Aalberst					
Status:	-		Create Date:						
				20-Sep-2011					
Priority:			Product:	Project Initia	tie Document	(PID)			
Due Date:	23-Sep-2011		Remarks:						
Decision:	Open								
Geëscaleerd:			Test Aloc:	-					
Actions					Menar	1.000	n Actions		
Nr Name	Description	C Owner	Related To	Due Date	Remarks				
Discussions									N
Creator (Date) Me	issage								
Documents (files, links	text)						Add	Add	No
Name	Description			Rev	ision Publi	shed	Publisher		
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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.

Sea	Search								
Advanced Search									
Searc	ch:	PID							
Туре	:	Project							
Creat	ted before:								
Creat	ted after:								
Sea	rch								
	Seach results are limited to the first 1 h results (folders):	00 hits.							
Туре	Name / Location	Description		Owner	Date				
Searc	h results (documents / files / hyper	links):							
Туре	Filename / Location	Description	Revision/Doc nr	Publisher	Modified				
*	Projectmanagement > IT Department >	PID Apollo 3.5 IT Change projects > Apollo Project > Project initiatie > Project Initiatie Docum	v3.5	Erik Aalbersberg	31-Mar-2010				
WE	_PID.rtf Projectmanagement > IT Department >	PID - Final IT Change projects > Project Amlin > Initiating a Project > Project Initiation Docu	v14	Erik Aalbersberg	06-Sep-2010				
MI	_PID.rtf Projectmanagement > Centre of Excelle	Project Initiation Documentation nce	v1.0	Erik Aalbersberg	24-Mar-2010	-			

Search page

Q

2.13 Project models

26

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 Portfolio	Management Pro	ojectmana	gement Resource Allo	cation Time Entry Prin	ce2 FAQ F	Project Plaza Import / Ex	port				Erik Aalber	sberg 👻 H	elp Su	pport	Setu	ip -
Projectmanager	ment > Standard P	rince2 20	09 P													*
Dashboard P	Properties Produc	t Breakdo	wn Plan Project relat	ted documentation Repo	ort Guide											
Project Mo	odel: Standar	d Princ	e2 2009 Project N	Model (UK)				Edit Pr	perties Edit	Members	Configure Process	Diagram		8	۹	
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Status: Info:	This project model provides you with set of managemer products [more]	a full	Directing a Project	Initiating a Project	Directing a	boundaries	age	Closing a Project)							н
Logs	PRINC	E2°	Products			O Project Bi	eard O Project	Manager O Team Memb	ers Edit Owner & N	Allectones	Edit Project Plan	Set Basel	ne	4 ·		
Logo	New 7	Total	 Starting-up a Principal 	niect					Eult Owner & n	Allestones	Euit Project Plan	Oet Dasel	ile .	+	-	
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R Risk log			Project Mandate				-								-	
Q Quality revi	iew log		Project Brief												-	
C Change log	9		Initiation Stage Pla	in			-								-	
A Daily / Actio	on log		Initiation Stage Aut	thorisation				-			-				-	
L Lessons lea	arned log															
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	•	Eult	Next Stage Plan	(10)							-				-	
Highlight F			Project Authorisation	on			-	-			-				-	
End Stage	e Report		Execution Stars	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 33) 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 as a section with the section management of project models are found in the section management of project models can be found in the section management of pro

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.

ortfolio Management > Portfolio	R&D (UK)												
ashboard Properties - Fin	ancials I	Portfolio Gantt Documents	Archive											
Portfolio: Portfolio R&	D (UK)			Edit F	roperties	Edit Members	Customise Page Te	Edit Field Co	onfiguration	Edit Page L	ayout E	dit Widgets		a 0
Name: Portfolio R&D (UI Description: Portfolio of the R departments Status: Description:	() &D	FORTES	Portfolio Logistics Overview of all proje quarter. Maximum F	ects within the lo	gistics de 17. If mor	partment with the e is needed, hirin	priority and FTE requi will be required.	red per						
Automated Reports	Edit	Projects (Portfolio Manage	ement)		Edit N	lew Send repo	t request Save as v	ersion Archive	Move	🖾 🛛 All Proj	ects		View O	ptions -
Importance vs Risk		Name		Last Published	Current	Stage Pr	ject Manager(s)		Status	Planning Status	Hours Status	Costs Status	End Da	ite
		∹ģ- Minsk				Ru	ud Peltzer		•	•	•	•	12-Oct-	2010
Reports		🔁 Venus			Preparat	ion stage Pe	er Cole		•	•	•	•	28-Sep	-2010
Projects (Portfolio Management)		Zenith										•		
Products		Zone project		16-Apr-2010	Project i	nitiation He	man Mulder						17-Sep	-2010
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Risks														
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Actions		Name	Saved On	Saved By	R	emarks by Owner								
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Entries			00 1101 2012	2										
Timeline Reports		Report Models									New	Import I	Export	Archive
Entries		Name 🌧	Objective											
		Monthly Report	Monthly Prog	ress Report										
		Weekly Report	Weekly Progr											

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

The Principal Toolbox allows for different project models that provide different approaches to project planning. As of release 6.5, following project models¹ are supported:

- <u>Classic PRINCE2 Project</u> 27
- Generic PRINCE2 Project 74
- Single Sheet Project 82

For help on project planning, tracking etc. please refer to the <u>classic project planning</u> 27. Special instructions for the other models are provided at the appropriate sections.

All type of models can be customised to the needs of your organisation. For help on this topic, please refer to managing project models as least needs of your organisation.

As of release 6.5, the option exists to migrate classic PRINCE2 projects to generic PRINCE2 projects. Please refer to project migration for more information.

¹ Special models may exist as well within your setup (provided by Fortes Solutions on customer request).

3.1.1 Classic PRINCE2 Project

The classic PRINCE2 project allows for a strict planning according to the PRINCE2 project management methodology. It does not allow for activity planning, only stages, work packages and products are supported.

The next sections provide information on using the project:

- Project dashboard 28

- Planning a project 31
- Managing a project 52
- Finishing a project 72

Most topics apply to other project models as well.

3.1.1.1 Project dashboard

28

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

tmanagement > IT Department >	T Change projection Apollo P	roject								
ooard Properties - Product B	eakdown Res	source Management 🔻	Documents - Portfolio	Report Reports Guide	Plaza					
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aily / Action log 10	Project Autorisatie			John Edwards	~	~		~		
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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 at 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 <u>automated reports</u> 142 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 34).

3.1.1.2 Planning a project

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

- 1. <u>Defining a product breakdown structure</u>.
- 2. Defining stages and work packages. 35
- 3. Assign products to work packages. 39
- 4. Planning the milestones of the project (basic 41 or advanced option 41).
- 5. Assign responsibilities for products 45
- 6. Assignment of budgets (hours and costs).
- 7. Defining dependencies between products. 48

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.

3.1.1.2.1 Creating a project

32

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	t Stage	Progre	SS	General	Planning Hours	Costs	Project Manager(s)

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

Project properties		
Name:		
Objective:		
Project Model:	Klein Prince2 2009 project mo	odel 💌
roject Color:		
Product Planning Type:	Principal Toolbox + Planning E	Export 💌
dd project members		
Project managers Erik Aalbersberg		Available users Q
-	<- Add Remove ->	Albert Swank Arjan van der Laan Henk Visser Herman Mulder
Project board		Ivo Rings Jan Jansen Jeroen van Barneveld
		John Edwards
	<- Add	Peter Cole Richard de Groot
	<- Add Remove ->	Richard de Groot Ruud Peltzer Ruud V. Weerdenburg
		Richard de Groot Ruud Peltzer Ruud v. Weerdenburg Samuel Davies Support Administrator
		Richard de Groot Ruud Peltzer Ruud v. Weerdenburg Samuel Davies Support Administrator Theo van Wirdum Tom Maasen
Project team members		Richard de Groot Ruud Peltzer Ruud V. Weerdenburg Samuel Davies Support Administrator Theo van Wirdum
Project team members		Richard de Groot Ruud Peltzer Ruud v. Weerdenburg Samuel Davies Support Administrator Theo van Wirdum Tom Maasen

Creating a new project

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

i ili ili ilie appiopi	ale	
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 < Add	Q.	Project Manager(s)		Available users
<- Add Remove ->	Albert Swank Arjan van der Laan Henk Visser	Peter Cole	<- Add Remove ->	Q Albert Swank Arjan van der Laan Erik Aalbersberg
Project board	Herman Mulder Ivo Rings Peter Cole	Project Support		Henk Visser Herman Mulder Ivo Rings
Jan Jansen Jeroen van Barneveld John Edwards	Richard de Groot Ruud Peltzer Ruud v. Weerdenburg		<- Add Remove ->	Jan Jañsen Jeroen van Barneveld John Edwards Peter Cole
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	rung oredu		<- Add Remove ->	Samuel Davies Support Administrator Theo van Wirdum Tom Maassen
		Project Board - Senior User Erik Aalbersberg		Yung Ji-Lao
Project team members Samuel Davies Support Administrator		Erik Aalbersberg	<- Add Remove ->	
<- Add		Project Board - Senior Supplier		
Remove ->		Yung Ji-Lao	<- Add Remove ->	
		Project Assurance		
			<- Add Remove ->	
		User Group (optional)	Remove ->	
		Con Group (Special)	<- Add	
			Remove ->	
		Supplier Forum (optional)		
			<- Add Remove ->	
		Project Team - Team Manager(s) Richard de Groot	1	
			<- Add Remove ->	
		Project Team - Team Member(s) Herman Mulder Arjan van der Laan Ruud v. Weerdenburg	<- Add Remove ->	
				J

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.

3.1.1.2.2 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.

roject jalan Project osastri Project Maridale Project Maridale	Utel Breakdown at communicatie producten foorbereiding Vragenformulieren verzonden Intraka-gespreiten echnische producten Polit installate Handleiding systeembheer Distributier MS office CD-R Installate devembheer Distributier MS office CD-R Installate devembheer Distributier MS office CD-R Uter of and Carl POS wplementate producten Handleiding angepast Gebruikerstraining Palot mjelementaie	ork packages	n product	Copy	y products
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Implementalie voorhereiding (verkpakket) Handleiding systeembeheer Handleiding aangepast					
Handleiding systeembeheer Instructie systeembeheer Handleiding aangepast	Instructie en begeleiding op	n werkniek			
Handleiding aangepast	-Helpdesk opzetten	, trompion			
	Gebruikersvalualie				
	-Opstellen FAQs lijst				
	-Vragenuur				
Installatie (door leverancier)					
Pilot installatie					
Installatie door systeembeheer					
Geteste installatie					
Highlight Report					
Go / No go					
Ψ					

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.

3.1.1.2.2.1 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.

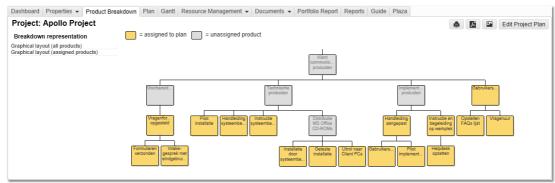
How to assign products to stages and work packages is described in the next sections.

3.1.1.2.2.2 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.

3.1.1.2.2.3 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'.

it Project Plan						Save	Cance
New stage	lew work	package	New spec. product	New man. produc	New man. product	Сору	produc
Project plan	•			Specialist M Product Brea		kages	>>
Starting-up a Project Project Mandate			New	Project end project end product 1			
Project Brief Initiation Stage Plan Initiation Stage Authorisation			Project plan	Product 1 Product 2 Product 2	.2		
Initiating a Project				Product 2			
Business Case Project Initiation Documentation (PID) Next Stage Plan	=	-	Unassign				
Project Authorisation			click on item.				
Execution Stage 1 Work Package 1 Product 1.1			nanently remove items em into the trash can				
Highlight Report End Stage Report			Remove				
Next Stage Plan Next Stage Authorisation							
Execution stage 2 Work Package 2			â				
Product 1.2 Product 2.1							
Product 2.2 Highlight Report	-						

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	Can
New stage	New work	New spec. product	New man. product New man. product	Сору	produ
Project plan			Specialist Management Work page	kages	
			Product Breakdown	<<	>>
Starting-up a Project		New	Project end product		
Project Mandate		New	- Product 1		
Project Brief			- Product 1.1		
Initiation Stage Plan			Product 1.2		
Initiation Stage Automstation		Project plan	Product 2		
miliation Stage Autorisation			- Product 2.1		
			Product 2.2		
Initiating a Project		Unassign			
Business Case		chadaigh			
Project Initiation Documentation (PID)	E				
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		Remove			
Highlight Report		Keniove			
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.

			Specialist Management Work page	kages
Project plan	Â		Product Breakdown	<< >>
Starting-up a Project		New	Project end product	
Project Mandate		New	- Product 1	
Project Brief			- Product 1.1	
Initiation Stage Plan			Product 1.2	
Initiation Stage Authorisation		Project plan	Product 2	
Initiation Stage Authonsation			- Product 2.1	
			Product 2.2	
Initiating a Project		Unassign		
Business Case		Undasign		
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		Remove		
Highlight Report				
End Stage Report				
Next Stage Plan				
Next Stage Authorisation				
Execution stage 2		<u> </u>		
Work Package 2		Ш		
Product 1.2				
Product 2.1				
Product 2.2				

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

3.1.1.2.2.4 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 [397]).

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**'.

	ge New spec. product New Project plan Unassign To rename, double- click on item. permanently remove item ag them into the trash can	Product Breakdown Project end product Project end product 1 Product 1 Product 1.2 Product 1.2 Product 2.2 Product 2.1 Product 2.2	Work package		>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Starting-up a Project Project Mandate Project Brief Initiation Stage Plan Initiation Stage Authorisation Initiating a Project Business Case Project Initiation Documentation (PID) Next Stage Plan Project Authorisation Execution Stage 1 Vork Package 1	Project plan Unassign To rename, double- click on item. permanently remove item	Product Breakdown Project end product Project end product 1 Product 1 Product 1.2 Product 1.2 Product 2.2 Product 2.1 Product 2.2	Work package		**
Project Mandate Project Brief Initiation Stage Plan Initiation Stage Authorisation Business Case Project Initiation Documentation (PID) Exect Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	Project plan Unassign To rename, double- click on item. permanently remove item	Project end product Product 1 Product 1.1 Product 1.2 Product 2 Product 2.2 Product 2.2		<< >	>>
Project Mandate Project Brief Initiation Stage Plan Initiation Stage Authorisation Business Case Project Initiation Documentation (PID) Exect Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	Project plan Unassign To rename, double- click on item. permanently remove item	Product 1 Product 1.1 Product 1.2 Product 2 Product 2.2			
Project Brief Initiation Stage Plan Initiation Stage Authorisation Initiating a Project Business Case Project Initiation Documentation (PID) Exact Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	Project plan Unassign To rename, double- click on item. permanently remove item	Product 1.1 Product 1.2 Product 2 Product 2.1 Product 2.2			
Initiation Stage Plan Initiation Stage Authorisation Initiating a Project Business Case Project Initiation Documentation (PID) Execution Stage 1 Work Package 1	Unassign To rename, double- click on item. permanently remove item	L Product 1.2 Product 2 Product 2.1 Product 2.2			
Initiation Stage Authorisation Initiating a Project Business Case Project Initiation Documentation (PID) E Next Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	Unassign To rename, double- click on item. permanently remove item	Product 2.1 Product 2.1 Product 2.2			
nitiating a Project Business Case Project Initiation Documentation (PID) E Next Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	Unassign To rename, double- click on item. permanently remove item	Product 2.1 Product 2.2			
nitiating a Project Business Case Project Initiation Documentation (PID) E Next Stage Plan Project Authorisation Execution Stage 1 To Work Package 1	To rename, double- click on item. permanently remove item:	L Product 2.2			
Business Case Project Initiation Documentation (PID) Project Authorisation Execution Stage 1 Work Package 1	To rename, double- click on item. permanently remove item:	15			
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Next Stage Plan Project Authorisation Execution Stage 1 To Work Package 1 dra	click on item. permanently remove item				
Project Authorisation Execution Stage 1 Vork Package 1 dra	click on item. permanently remove item				
Execution Stage 1 To Work Package 1 dra	click on item. permanently remove item				
Work Package 1 dra					
WORK Package 1	ag them into the trash can				
Product 1.1		L			
	Remove				
Highlight Report	Remove				
End Stage Report					
Next Stage Plan					
Next Stage Authorisation					
Execution stage 2	m				
Work Package 2					
Product 1.2					
Product 2.1					
Product 2.2					
Highlight 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.

Project plan Starting-up a Project Project Mandate Project Mandate Project Bief Initiation Stage Puan Initiation Stage Authorisation Initiation Stage Puan Initiation Stage Authorisation Initiation Documentation (PID) Next Stage Plan Project Authorisation To rename, double- click on item.	lit Project Plan New stage Ne	ew workpackage New spec. product New man. product Copy prod
Execution Stage 1 To permanently remove items drag them into the trash can. Product 1.1 Remove Highlight Report Remove End Stage Report Remove Next Stage Plan Image: Comparison of the trash can. Next Stage Authorisation Image: Comparison of the trash can. Execution stage 2 Image: Comparison of the trash can. Product 1.2 Image: Comparison of the trash can. Product 2.1 Image: Comparison of the trash can.	Project plan Starting-up a Project Project Bind Project Bind Initiation Stage Plan Initiation Stage Authorisation Initiation Stage Authorisation Initiation Stage Authorisation Initiation Stage Plan Project Initiation Documentation (PID) Next Stage Plan Product 1.1 Highlight Report End Stage Report Next Stage Plan Next Stage Plan Next Stage Authorisation Execution stage 2 Work Package 2 Product 1.2 Product 1.2 Product 1.2	New Vork packages New Vackage 1 Project plan Vork package 2 Unassign Vork Package 3 To rename, double- click on item. Vork package 3

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

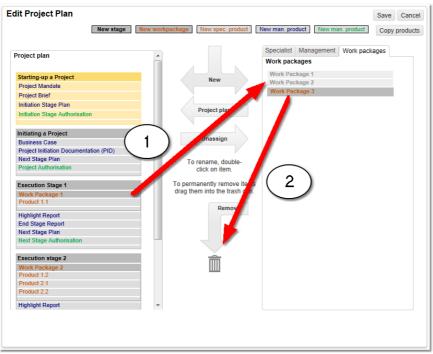
Moving work packages

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.

3.1.1.2.2.5 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 40.

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.

Project plan	*	Specialist Management Work p Product Breakdown	
			<< >>
Starting-up a Project	New	Project end product	
Project Mandate	new	Product 1 Product 1.1	
Project Brief		Product 1.1 Product 1.2	
Initiation Stage Plan		Product 1.2	
Initiation Stage Authorisation	Project plan	- Product 2.1	
		Product 2.2	
Initiating a Project			
Business Case	Unassign		
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	Remove		
Highlight Report	Remove		
End Stage Report			
Next Stage Plan			
Next Stage Authorisation			
Execution stage 2	m		
Work Package 2			
Product 1.2			
Product 2.1			
Product 2.2			
Highlight Report			

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 Initiat	ion Docume	ntation (PID)				Save	Cancel	Page Layout 👻
Name: Descrip Owner Owner: Review Particip Priority Mandat	Group: ver: pants: v:	Ē	roject Manager	vumentation (PID)	 	Start: Draft: Checked: Final: Duration In Working Planning Status:	Planned date	Actual date		

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.

3.1.1.2.3 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. (41) On the Gantt chart (41) : 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.

3.1.1.2.3.1 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.

Proje	ct: Apollo project														
Produ	cts												Sa	ive C	ance
		Owner		Reviewer	P	articipants		S	Start Planned	Draft Pla	inned	Checker	d	Final Pl	anne
🕂 Pro	ject start-up							E	February	• >		• ×		22-Jan-	2013
Pro	ject initiation								Wk M 1	r w T	F	S S			
/	Initial Business Case	John Edwards	T	Samuel Davies 👻	- R	Richard Hammond, Peter Cole	ŀ	•	5 28 29 6 4 5	30 31 5 6 7	1	2 3 9 10		28-Jan-	2013
/	Project Initiation Document	John Edwards	T	Jeroen van Barneveld+	• S	amuel Davies, Richard Hammond, Yung Ji-Lao, Pete	r Cole	•	7 11 12			16 17	2013	04-Feb	-2013
	Project Authorisation	Samuel Davies	T	John Edwards	•	-		•	8 18 19 9 25 26			23 24		12-Feb	-201
- Red	quirements & Prototyping									5 6 7 Today: 20-	8 Feb-2	9 10 013			
	Pilot Preparation (Work Package)		d₩		•		•	• 1	14-Feb-2013	-				27-Feb	-201
	Requirements report	Yung Ji-Lao	T		₹ Je	eroen van Barneveld	ŀ	• 1	14-Feb-2013	18-Feb-2	2013	19-Feb-	2013	20-Feb	-201
	Database configured	Samuel Davies	T	- •	•	-		• 1	17-Feb-2013			-		27-Feb	-201
	Pilot (Workpackage)	Peter Cole	T		•			• 1	16-Feb-2013					01-Mar	-201
	User instruction	Richard Hammond	T		•	-	·	• 2	23-Feb-2013					01-Mar	-201
	Pilot evaluation	Richard Hammond	T		• P	Peter Cole	ŀ	• 1	16-Feb-2013					01-Mar	-201
	Highlight Reports	Peter Cole	T		•			• 2	24-Feb-2013					01-Mar	-201
	Next Stage Plan	Yung Ji-Lao	T		r R	Richard Hammond, Samuel Davies	•	• 0	01-Mar-2013	01-Mar-2	2013			04-Mar	-201
-	Next Stage Authorisation	John Edwards	Ŧ		v			e la	02-Mar-2013					05-Mar	201

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.

3.1.1.2.3.2 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.

	> 14	Veek				w	eek (v	/eek (Wee	k 7				Wee	k 8			
Name	2	1-Jar	1-201	3		28	-Jan	-2013	3		0	1-Feb	o-20'	13			11-F	eb-2	D13			18-F	eb-2	013		
	M	ΙΤ,	wπ	F	s s	М	Т	wт	F	s	s M	Т	w	r F	s	s	мТ	W	Т	F S	S	м т	W	Т	FS	3 5
Project start-up		÷.,																								
Project Mandate																										
Project Brief																										
/ Initiation Stage Authori	sati	-																								
Project initiation					-					_					-											
/ Initial Business Case																		1								
Project Initiation Docur	nent						١Ď	Ċ																		
Project Authorisation										1				Ó												
Requirements & Prot	ot																									-
Pilot Preparation (V	/o																			- 1						
Requirements report																Ex	terna	•	t			0 (•			
Database configured																						-				
Pilot (Workpackage)																									
User instruction																				-1						
Pilot evaluation																										

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 center 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.

			< >	Week 5		Week	6		Week 7			w	eek	8		
Name	Start	Final	Duration	28-Jan-2	013	04-Fe	b-2013		11-Feb	-2013		18	3-Fel	-20 1	3	
				мтw	TFSS	МТ	WTFS	S	ΜТ	ΝT	FS	SΜ	Т	W	F	SS
Project start-up	31-Dec-2012	22-Jan-2013	17													
 Project Mandate 	31-Dec-2012	09-Jan-2013	8													
 Project Brief 	11-Jan-2013	16-Jan-2013	4													
Initiation Stage Authorisati	17-Jan-2013	22-Jan-2013	4													
Project initiation	< January	v > 2	013 🔻 🗙													
Initial Business Case	Wk M	Z	FSS													
Project Initiation Document	1 31	1 2 3	4 5 6	Ó.												
Project Authorisation	2 7	8 9 10	11 12 13				Ó									
Requirements & Protot	3 14	15 16 17	18 19 20													
Pilot Preparation (Wo	4 21	22 23 24	25 2627 1 2 3													
Requirements report	6 4	5 6 7	8 910					Ext	ernal 🖝	-		Ċ	Ò			
Database configured	T	oday: 20-Feb-	2013											_		
Pilot (Workpackage)	16-Feb-2013	01-Mar-2013														
User instruction	23-Feb-2013	01-Mar-2013	5													
Pilot evaluation	16-Feb-2013	01-Mar-2013	10													
Highlight Reports	24-Feb-2013	01-Mar-2013	_													

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> 48. 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.

Before: dependency conflict	After: problem solved

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 <u>the use of colours in projects</u> **1**8. For more help on dependencies, see <u>defining dependencies</u> **4**8.

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

3.1.1.2.3.3 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.



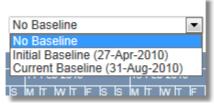
Choose the baseline type (Initial or Current Baseline) to save the schedule.

Project Baseline)
	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	

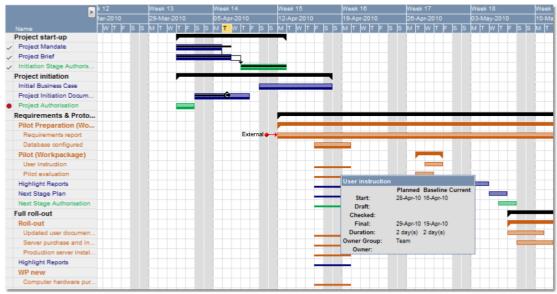
Setting a baseline

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

3.1.1.2.4 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.

	on Stage Plan	Edit Change Picture Close Page Layout 👻 Approval Settings Edit Widgets 🛛
Name: Description: Dwner Group: Dwner: Reviewer: Participants: Priority: Mandatory:	Initiation Stage Plan Project Manager 	Planned Actual date Start: Draft: Checked: Final: Duration In Working Days: 0.00 Planning Status:
the major products, a of the plan. In PRINCE2 2009, th	tement of how and when objectives are to be ctivities and resources it requires for the sco ere are three fevels of plan: project, stage ar need to follow the same composition as a P	nd team. Team Plans are
		Add Add Note
eliverables		
eliverables		Add Add Note Open Template Remove Show History Update
	Description	
emplates	Description Plan	

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: <u>issues, risks and quality review</u> and the <u>Dependencies</u> 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 Depende	ncies Costs & Hours Re	ource Demand				
Product: Project In	itiatie Document (Pl	D)				Edit Close
Name: Description: Owner Group: Owner: Reviewer: Participants: Priority: Mandatory: Planning	Project Initiatie Document Project Manager Peter Cole John Edwards Richard de Greet, Yung J		Start: Checked: Final: Duration in Woo Planning Statue		13 28-Sep-2006 13	tate
Percentage Complete:	75%	(www.com))	-			
tions Nr Name	Description	Edit New	Remove ✓ !	R Ca C		View Options
6 Manager aft aanspreken		ing over het 0 Yung Ji-Lac		26-Ma		UMIEI
Issues Nr Description	(A) Type	Edit New Decision	Remove ✓ !	R Ca C		View Options Remarka
	I not make it 0 0 issue	Open	John Edwards	Project Initiatie Document (PID	23-Sep.2011	
Risks				Nex	Open Risks	View Options
Quality reviews				New	Open Quality Rev	iews - + View Options
					Open Changes	

Logs tab

Dependencies tab

3.1.1.2.5 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			1		
Project managers		Available users	Select project members		
Erik Aalbersberg		Q			
	<- Add	Albert Swank	Project Manager(s)		Available users
	Remove ->	Arjan van der Laan	Peter Cole	<- Add	Albert Swank
		Henk Visser Herman Mulder		Remove ->	Arjan van der Laan
L		Ivo Rings		rionioro	Erik Aalbersberg Henk Visser
Project board		Peter Cole	Project Support		Herman Mulder
Jan Jansen		Richard de Groot		<- Add	Ivo Rings Jan Jansen
Jeroen van Barneveld		Ruud Peltzer			Jeroen van Barneveld
John Edwards	<- Add	Ruud v. Weerdenburg Theo van Wirdum		Remove ->	John Edwards
		Tom Maassen			Peter Cole Richard de Groot
	Remove ->	Yung Ji-Lao	Project Board - Executive		Ruud Peltzer
			John Edwards	<- Add	Ruud v. Weerdenburg Samuel Davies
				Remove ->	Support Administrator
		J		Remove*	Theo van Wirdum Tom Maassen
Project team members		ן ר	Project Board - Senior User		Yung Ji-Lao
Samuel Davies			Erik Aalbersberg		
Support Administrator				<- Add	
	<- Add			Remove ->	
			Project Board - Senior Supplier		
	Remove ->		Yung Ji-Lao		
			Tang of East	<- Add	
				Remove ->	
			Project Assurance		
			-	<- Add	
				Remove ->	
			User Group (optional)		
				<- Add	
				Remove ->	
				Nemore -	
			Supplier Forum (optional)		
				<- Add	
				Remove ->	
			L		1
			Project Team - Team Manager(s)]
			Richard de Groot	<- Add	
				Remove ->	
				Nemove ->	
			Project Team - Team Member(s)		
			Herman Mulder		
			Arjan van der Laan Ruud v. Weerdenburg	<- Add	
			radu v. weerdenburg	Remove ->	
			L		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.

	rd Properties - Produ	uct Breakdowr	Plan Gan	t Resource Manageme	nt - Documents - Portfolio	Report Re	ports	Guide					
rojeo	t: Apollo project									Edit Proje	ct Plan Set	Baseline	e
Produc	ts					Edit 📲	ĥ	* St	ageplan		View Options	• +	
		Owr	ner	Reviewer	Participants				Start Planned	Draft Planned	Checked Planned	Final P	lanne
Ŧ Proj	ect start-up								31-Dec-2012			22-Jan-	2013
🗕 Proj	ect initiation												
~	Initial Business Case	Joh	n Edwards	Samuel Davies	Richard Hammond, Peter Cole				21-Jan-2013			28-Jan	-201
/	Project Initiation Document	nt Joh	n Edwards	Jeroen van Barneveld	Samuel Davies, Richard Hammo	nd, Yung Ji-La	ao, Pete	Cole	29-Jan-2013	29-Jan-2013	30-Jan-2013	04-Feb	-201
	Project Authorisation	San	nuel Davies	John Edwards	-				03-Feb-2013	07-Feb-2013		12-Feb	-201
-] Req	Pilot Preparation (Work	Package) Jerr	en van Barneve	ld Peter Cole					14-Feb-2013			27-Feb	-20
												27-1 60	
	Requirements report		g Ji-Lao		Jeroen van Barneveld				14-Feb-2013	18-Feb-2013	19-Feb-2013	20-Feb	-201
		Yun			Jeroen van Barneveld				14-Feb-2013 17-Feb-2013	18-Feb-2013			
	Requirements report	Yun San	g Ji-Lao							18-Feb-2013 	19-Feb-2013	20-Feb	-201
	Requirements report Database configured	Yun San Pete	g Ji-Lao nuel Davies		-				17-Feb-2013	18-Feb-2013 	19-Feb-2013 	20-Feb 27-Feb	-201
	Requirements report Database configured Pilot (Workpackage)	Yun San Pete Rici	g Ji-Lao nuel Davies er Cole						17-Feb-2013 16-Feb-2013	18-Feb-2013 	19-Feb-2013 	20-Feb 27-Feb 01-Mar	-20 -20
	Requirements report Database configured Pilot (Workpackage) User instruction	Yun San Petr Rict Rict	g Ji-Lao nuel Davies er Cole nard Hammond						17-Feb-2013 16-Feb-2013 23-Feb-2013	18-Feb-2013 	19-Feb-2013 	20-Feb 27-Feb 01-Mar 01-Mar	-201 -201 -201
	Requirements report Database configured Pilot (Workpackage) User instruction Pilot evaluation	Yun San Pete Ricl Ricl	g Ji-Lao nuel Davies er Cole nard Hammond nard Hammond		 Peter Cole	es			17-Feb-2013 16-Feb-2013 23-Feb-2013 16-Feb-2013 24-Feb-2013	18-Feb-2013 	19-Feb-2013 	20-Feb 27-Feb 01-Mar 01-Mar 01-Mar	-201 -201 -201 -201

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.

John Edwards Peter Cole	V N	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.
- 3.1.1.2.6 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> 33th). 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.

Project: Apollo project							Edit Project Plan Set B	aseline 🛔											
Products				E	at 🗱 🛱	Costs total	View Options	*+ =-											
	Costs Budget	Costs	Costs Actual	Costs C	osts Variance														
Project start-up	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)				General Logs Deper				nd						
 Project initiation 									Product: Project	Initiatie D	ocument (F	D)						Edit	Close 💆
Initial Business Case	1,000.00	0.00	400.00	700.00	100.00														
 Project Initiation Document 	9,000.00	329.00	19,080.00	0.00	10,400.00				Hours	Manual	Entries	Total		Costs		Manual	Entries	Total	
 Project Authorisation 	0.00	0.00	0.00	0.00	0.00														
	(10,000.00)	(320.00)	(19,480.00)	(700.00)	(10,500.00)					800.00	0.00	800.00		Budget:	32,	500.00	0.00	32,500.00	
Requirements & Prototyping									Committed:	0.00	0.00	0.00		Committed:		0.00	0.00	0.00	
-									Actual:	0.00	636.00	636.00		Actual:	3,	00.00	50,870.00	53,870.00	
Pilot Preparation (Work Pac									Remaining:	0.00	0.00	0.00		Remaining:		0.00	0.00	0.00	
Requirements report	2,100.00	0.00	262.50	2,000.00	162.50				Variance:			-164.00		Variance:				21,370.00	
Database configured	0.00	0.00	0.00	0.00	0.00							104.00						21,310.00	
	(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 Percentage Complete	: 75%									
	(17,400.00)	(0.00)	(0.00)	(17,400.00)	(00.00)				Percentage Complete	2: 75%									
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 li	sting			Edit	New Cost / Hour Entry	R.	C8 C8	* All entries	- V	few Options -
 Next Stage Authorisation 	0.00	0.00	0.00	0.00	0.00				Description	Type	Appro	val Status	Hours	Owner	Creator		Book Date 🚖 Ren	narks by Owner	
-	(19,500.00)	(0.00)	(262.50)	(19,400.00)	(162.50)				Support	Actual	Appro	ved	10	0.00 Erik Aalbersberg	Erik Aali	ersberg	09-Apr-2010		
									Tech Data	Actual	Appro	hard		2.00 Erik Aalbersberg	Erik Aali	ershern	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.

Hours	Manual	Entries	Total	Costs	Manual	Entries	Tota	al
Budget: Committed: Actual: Remaining: Variance:	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	
lanning Vercentage Com				Edit New Cost / Hour Entry	f . C1 C1	* All entries		View Optior
	-			· · · ·				
Cost / Hour Entri Description Support	Es listing Type Actual	Appro		Hours Owner 10.00 Erik Aalbersberg	Creator Erik Aalbersberg	Book Date 09-Apr-2010		

3.1.1.2.7 Defining dependencies

The easiest way to define dependencies within your project is by using the <u>editable Gantt</u> $|_{4}^{h}$. 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 De	ependencies	Costs & Hours	Resource Demand								
Product: Proje	ect Initiati	e Document	(PID)						Edit	Close	
Name:	Pr	roject Initiatie Docu	ment (PID)			Planne date	ed	Actual date			
Description: Owner Group: Owner: Reviewer: Participants: Priority:	Pe Jo Ri		ung Ji-Lao, Herman Mulder	Dur	Start: Draft: Checked: Final: ation In Worki	11-Jan-2 17-Jan-2 ing Days:		Sep-2006			
Mandatory: Planning Percentage Comp	plete: 75	5%									
Predecessors									Add	Depende	ency
External predeces	ssors						Edit Ad	ld Dependency	Remove	Depende	ency
Name		Project Venus Projec	1	Start 03-Jul-2012	Draft 	Checked	Final 09-Jul-2012	Lag Dependo gFinish-to			
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:

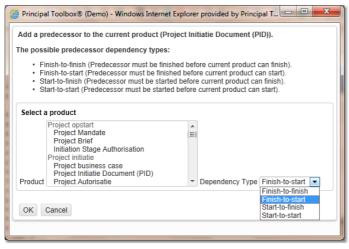
Finish-to-finish:	Product (B) cannot be finished until product (A) has been finished. For example, if you have two products, "Wiring" and "Installation inspected", "Installation inspected" cannot	A B	
	be finished until "Add wiring" has been finished. Work on product (B) cannot start until product (A) has been finished. For example, if you have two products.		
Finish-to-start:	"Constructed fence" and "Painted fence", "Painted	A B	
	fence" cannot be started until	5	
	"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	A	
Start-to-minsh.	Predecessor must be started	В	
	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	
Sidit-10-Sidit.	"Foundation poured" and	В	
	"Concrete leveled", "Concrete leveled" 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

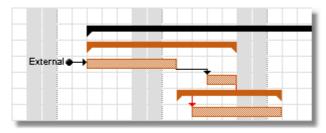
The relationships are verified based on the start and end date of the products. If an end date of a ' Predecessor' is delayed or planned later than the start date of the 'Successor' and the relation is defined as; Finish-to-Start, a blue traffic light is shown to indicate a problem.

	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

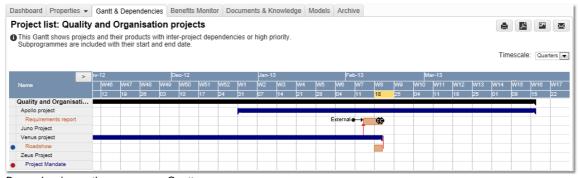
On programme level these inter-project dependencies are also represented so the programme manager can see bottlenecks in the execution of the programme.

See the screenshots below:

ashboard	Properties -	Gant	t & Dep	endenc	ies B	enefits	Monito	or D	ocume	nts & K	nowle	dge	Models	Arch	ive										
roject li	st: Quality	and	Orga	nisat	ion p	roje	cts																문		×
This Gantt	t shows project	s and	heir pro	ducts v	with inte	er-proj	ect dep	ender	cies or	high p	riority														
Subprogra	ammes are incl	uded v	ith their	r start a	ind end	date.																			
																						Tin	nescal	e: Qua	rters 💽
	>	ov-12			D	lec-12				Jan-1	3			Fe	b-13			М	ar-13						
Name		W4	3 W47	W48	W49	W50	W51	W52	W1	W2	W3	W4	W5	WB	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17
		12	19	26	03	10	17	24	31	07	14	21	28	04	11	18	25	04	11	18	25	01	08	15	22
Quality and	d Organisati	-		-	-					-		-		-	-		-	-	-	-	-	-			
Apollo proje	ect														-										
Requirem	nents report													External	• • •										
Juno Proje	ct														1										
	ect									-	-	-	-	-	-										
Venus proje				_		-	-												-	-	-	-		-	-
Venus proje Roadshor	w																								
						_																			

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

3.1.1.2.8 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> [117].

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

Principal Toolbox 6.5

3.1.1.3 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.

3.1.1.3.1 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	~			~	-	-	-	-	-	-	•
~	Project Initiation Document	John Edwards	\checkmark	\checkmark	\checkmark	\checkmark	-	1	2	1	-	-	•
٠	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;

		>					Nee	ek 2				V	Ne	ek 3					We	ek	4	
	Name		201	2			07-J	lan-2	013			1	14-	Jan-	201	3			21	-Jar	1-20)13
			Т	F	s	s	мΙ	гw	T	F	S S	3 N	И	т١	ΝT	F	s	s	м	Т	w	Т
	Project start-up																					
~	Project Mandate																					
~	Project Brief		1						_													
/	Initiation Stage Authoris	ati	1				Ē															
	Project initiation		H						-													
~	Initial Business Case		1						-										-			
~	Project Initiation Docum	ient							-					-	<u> </u>							
•	Project Authorisation						-		1				1						ŵ			

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

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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		
g Days: 15.00		
	date 05-Mar-2013 13-Mar-2013 19-Mar-2013 25-Mar-2013	date 05-Mar-2013 13-Mar-2013 19-Mar-2013 25-Mar-2013

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.
- 3.1.1.3.2 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 'Time sheets'. Users of Principal Toolbox get a weekly time sheet on which they can enter their actual spent hours (requires add-on 'Time sheets').

System administrators and time sheet managers, check '<u>Configuration of time entry</u> [12[†]]' for more information about possible configurations.

3.1.1.3.2.1 Filling in time sheets (add-on)

When users of Principal Toolbox have been added in the module **'Time sheets'**, 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> 54⁻.

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	-2013 - 10-Feb	-2013 (Erik	Aalbe	ersber	rg)								Save	Save a	and Requ	lest Approv	/al Ca	ancel
Owner:	Erik Aalbersberg						Time Er	ntry Gro	oup:	IC	т							
Time Sheet Status:	New						Time Sh	neet Ap	prover	(s): R	uud v	Weerd	enburg					
Last Saved By:									pprover	r /								
Total Hours:	12.00						Group N Remark											
Minimum Hours:	38.00						toman	5 5 9 0										~
Start Date:	04-Feb-2013																	
End Date:	10-Feb-2013																	
Correction Time Sheet:	-																	
Fill in the hours for this v individual rows may nee										selected	l for t	ime entr	ry by th	ne owner	r of the ti	me sheet. I	Note tha	t
individual rows may nee Project			This is in Mon	dicated Tue		s at the	start of t Fri			selected		ime enti 6 Compl			r of the ti	me sheet. I Remarks (s)		
ndividual rows may nee Project General	d approval by project	ct manager(s). T Hours Actual	Mon 4	dicated Tue 5	by icon: Wed	Thu 7	start of t Fri	the row.	Sun	Totals	9		ete Rer		r of the ti	Remarks		
Project General Venus Project (Albert S	d approval by project	Ct manager(s). T Hours Actual	Mon 4	dicated Tue 5	Wed 6	s at the Thu	start of t Fri 8	the row.	Sun	Totals	9 0.00		ete Rer		r of the ti	Remarks		
ndividual rows may nee Project General	d approval by project	ct manager(s). T Hours Actual	Mon 4	dicated Tue 5	Wed 6	Thu 7	start of t Fri	the row.	Sun	Totals	9		ete Rer		r of the ti	Remarks		
Project General Venus Project (Albert S Apollo project (Arj •	d approval by project	Ct manager(s). T Hours Actual	Mon 4 4.00	dicated Tue 5	Wed 6	Thu 7 6.00	Fri 8	he row. Sat 9	Sun 10	Totals	9 0.00 2.00 [ete Rer		r of the ti	Remarks		
Project General Venus Project (Albert S Apollo project (Arj •	d approval by project	Ct manager(s). T Hours Actual	Mon 4	dicated Tue 5	Wed 6	Thu 7	start of t Fri 8	the row.	Sun 10	Totals	9 0.00		ete Rer		r of the tir	Remarks		
Project General Venus Project (Albert S Apollo project (Arj •	d approval by project	Ct manager(s). T Hours Actual	Mon 4 4.00	dicated Tue 5	Wed 6	Thu 7 6.00	Fri 8	he row. Sat 9	Sun 10	Totals	9 0.00 2.00 [ete Rer		r of the ti	Remarks		

Time sheets

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.

3.1.1.3.2.2 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 121'.

3.1.1.3.3 Reporting

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

3.1.1.3.3.1 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: Due date:		Portfolio ICT (NL)							Last Published On: Last Published By:	28-Feb-2011		
Report Stat	tus:	29-Jan-2013							Request Remarks:	Erik Aalbersberg		
Forecast st	tart date:	01-Jan-2013										
Properties												
General Name:		Apollo Project										
Project Mar Start Date:		Peter Cole										
End Date:		28-Dec-2012 03-Apr-2013										
Progress Tijd:						Status (Tij						
Geld:		• •				Status (Ge Status (Pla Status (Re	anning):					
Planning: Resources:	:	• •					,					
Financial Budget:		•	Actu	ali		ETC:			EAC:			
Duager		150,000.00	Acto		100,000.00	210.			75,000.00		175,000.00	

The portfolio 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.

3.1.1.3.3.2 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.



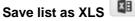
Save list as RTF

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.

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 button.
- 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.

3.1.1.3.3.3 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) 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.

Automated Reports	Edit
Highlight Rapport	
Highlight Report	

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

- 2. 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> 60).

🗑 🛃 🤊 • ଓ 🗋 😂 😫 💆 🖛	Hoofdpuntenra	pport [Compatibi	lity Mode] - Mie	crosoft Word		- 0 -X
File Home Insert Page	Layout References Mailings	Review Vie	w Add-Ins	Acrobat		۵ (
Paste B I U - abe X		loria ≣laria		zBbCcL AaBbCo mphasis ¶Norm	al Strong Change	A Find -
·			_		* Styles *	k≩ Select +
Clipboard 12 Font	G.	Paragraph	6	S	tyles G	
L 1+2+1+1+1+	- 18 1 - 1 - 2 - 1 - 3 - 1 - 4 - 1 - 5 - 1	+ 6 + 1 + 7 + 1 + 8	· · · 9 · · · 10 ·	(1+11+1+12+1) + 1	3 - 1 - 14 - 1 - 15 - 1 - 🖓 - 1 - 17	7 - 1 - 18 -
-						1
-	Status next period					
	a alatus next period					
	.1 Status Work Package					
	in outurs from ruckage					
5	.2 Products to be delivered					
4	2 Products to be delivered	I				
0 -	Name	Owner		Hours Variance		
8	Intake-gesprek met eindgebruikers Handleiding aangepast	Richard de Groot Herman Mulder		327.15		
	Geteste installatie			44.00		
00	HighlightReport			0.00		
·	Go / No go			0.00		
-	Vragenuur			0.00		
<u>e</u>	Highlight Reports			0.00		
	Next Stage Authorisation	John Edwards	15-Feb-2013	0.00		
	Helpdesk opzetten			0.00		1
	Opstellen FAQs lijst			0.00		
1	Gebruikersvaluatie			0.00		
7	Checkpoint Reports			0.00		
1 21	Team Plan			0.00		
	Stage Plan update Next Stage Plan	Peter Cole		0.00		
	End Stage Report			0.00		
	Project Plan update			0.00		
	Project Plan update		01111012010	0.00		
	(Netherlands)		01111012010	0.00		

See <u>Automated reports</u> [142] for more information

3.1.1.3.3.4 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.

Projectmana	gement > IT De	partment > IT Change pro	ojects							- 1
Dashboard	Properties -	Gantt & Dependencies	Documents & Knowledge	Models	Archive					
Project I	list: IT Chai	nge projects			Edit Properties	Edit Members	Edit Tolerances	Edit Widgets	0	٩

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rogramme and Froj	ect Tolerances								Close
Set tolerances									
	e projects in this programme ently by setting alternative v			ces can be s	et in the first row.	For spe	cific projec	ts, the	
 Stage Planning 	absolutely or relatively (perc	- ·	-						
	he active stage is running b	ehind, or on schedu	le with respe	ect to the plar	nned end date.				
 Product Planning Counts the number of r 	products overdue (in respect	to the total number	of products	in the project	nlan)				
Costs	nouncia overane (in respect	to the total number	or products	in the project	piany.				
Summarizes the costs	(committed, actual and rema	aining) and compare	s this in resp	pect to the bu	idget for all produ	cts in the	e project p	lan.	
Hours									
Summarizes the hours	(committed, actual and remain	aining) and compare	es this in res	pect to the bu	udget for all produ	icts in th	e project p	olan.	
Default project tolerances						Edit	* Plannir	na Toleran	ices 🔻
belauti project tolerances									
belauti project tolerances		Stage Planning Tole	rance		Product Planning	Tolerand		.,	
		Stage Planning Tole Orange (%) (Abs)	rance Red (%)	Red (Abs)	Oran	ge p	e	Red (Abs)	Active
lame 🔶		Orange (%) Orange		Red (Abs)	Orange (%) Oran (Abs)	ge p	e	Red (Abs)	Active
Name 📥		Orange (%) Orange (Abs)	Red (%)		Orange (%) Oran (Abs)	ge R	ed (%) F	Red (Abs)	Active Stage Only
lame .♣ Change projects	(exceptions to the default	Orange (%) Orange (Abs) 0	Red (%)		Orange (%) Oran (Abs)	ge R	ce ed (%) F O	Red (Abs)	Active Stage Only
lame	(exceptions to the default	Orange (%) Orange (Abs) 0	Red (%) 0		Orange (%) Oran (Abs)	ge R 2 Edit	ed (%) F 0 * Plannir	Red (Abs) 4	Active Stage Only
lame	(exceptions to the default Project Specific Tolerances	Orange (%) Orange (Abs) 0 tolerances) Stage Planning Tole Orange (%) Orange (Abs)	Red (%) 0		Orange (%) (Abs) 0 0	ge R 2 Edit Tolerand	ed (%) F 0 * Plannir	Red (Abs) 4	Active Stage Only
lame ⇒ T Change projects Project specific tolerances lame ⇒	Project Specific	Orange (%) Orange (Abs) 0 tolerances) Stage Planning Tole Orange (%) Orange (Abs)	Red (%) 0	0 0	Orange (%) Oran (Abs) 0 0 Product Planning Orange (%) Oran (Abs)	ge R 2 Edit Tolerand	ed (%) F 0 * Plannir	Red (Abs) 4 ng Toleran Red (Abs)	Active Stage Only
lame → T Change projects Project specific tolerances lame ↓ vpollo Project	Project Specific	Orange (%) Orange (Abs) 0 tolerances) Stage Planning Tole Orange (%) Orange (Abs)	Red (%) 0 rance Red (%)	0 0 Red (Abs)	Orange (%) Oran (Abs) 0 0 Product Planning Orange (%) Oran (Abs) 0 0	ge R 2 Edit Tolerand ge R	ed (%) F 0 (* Plannir ce ed (%) F	Red (Abs) 4 ng Toleran Red (Abs) 0	Active Stage Only
Iame → T Change projects Project specific tolerances Iame Apollo Project Iuno Project	Project Specific Tolerances	Orange (%) (Abs) 0 tolerances) Stage Planning Tole Orange (%) (Abs) 0	Red (%) 0 rance Red (%) 0 0	0 0 Red (Abs) 0 0	Orange (%) Oran (Abs) 0 0 Product Planning Orange (%) Oran (Abs) 0 0	ge R 2 Edit Tolerand ge R 0	ee ed (%) F 0 (* Plannir ee ed (%) F 0	Red (Abs) 4 ng Toleran Red (Abs) 0 0	Active Stage Only Inces
Vame \$ T Change project tolerances Project specific tolerances Name \$ Apollo Project Juno Project Dunga Project Zenus Project Zenus Project	Project Specific Tolerances	Orange (%) (Abs) 0 tolerances) Stage Planning Tole Orange (%) (Abs) 0 0	Red (%) 0 rance Red (%) 0 0	0 0 Red (Abs) 0 0 0 0	Orange (%) (Abs) 0 0 Product Planning Orange (%) (Abs) 0 0 0 0	ge R 2 Edit Tolerand ge R 0 0	ee (%) F 0 (* Plannir ce ed (%) F 0 0	Red (Abs) 4 ng Toleran Red (Abs) 0 0 0	Active Stage Only

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.

		Stage Plann	ing Toleran	ce			Product Pla	anning Toler	ance		
Name 🌲	Project Specific Tolerances	Orange (%)	-	Red (%)	Red	l (Abs)	Orange (%	Orange (Abs)	Red (%)	Red (Abs)	Active Stage On
Apollo Project	V	0	15		0	30	1) () 0	(
Juno Project		0	0		0	0	0	(0 0	(
Omega Project		0	0		0	0	0	(0 0	(
Venus Project		0	0		0	0	50	(100	(
Zeus Project		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.

Project specific toleran	ces (exceptions to th	e default tole	ances)						Sav	e Cance
		Costs Tolerance	9				Hours Tolerance			
Name 🜲	Project Specific Tolerances	Orange (%) Ora (Ab	nge Re s)	ed (%) F		Active Stage Only	Orange (%) Orange (Abs)	Red (%)	Red (Abs)	Active Stage Onl
Apollo Project	×	0	0	0	٥		0	0	0	0
Juno Project	v	0	0	100	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	0

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.

3.1.1.3.4 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.

lo project			
Resource Management +	Documents -	Portfolio Report	Reports
	Most recent de	ocuments	Members
	Search all pro		
Designed initiation	Project related	1	
Project initiation	Documents or	rping	

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

3.1.1.3.4.1 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 I	ink:	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.

Note: As of release 6.5, document can be dragged and dropped to any document list. For steps 2 and 3 the document is simply dragged with your mouse from your local computer and dropped on the listing. Description and Revision/Doc nr. will not be set automatically but can be set afterwards using the 'update' function.

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"
- Inks 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.

3.1.1.3.4.2 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	her	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	

Description Revision/Doc number	:	Standard description of the last version 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.
- 3.1.1.3.4.3 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 Publish	Publisher Approval Statu		Review Requ	ester
PID.rtf	PID	1	15-Feb-20	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 doc This operation will requ This is your selection: - PID.rtf		I the marked document	S.	
Approval settings				
Approvers John Edwards		I <- Add Remove ->	Available users Arjan van der Laan Erik Aalbersberg Jeroen van Barneveld Peter Cole Richard Hammond Samuel Davies Yung Ji-Lao	
Due date: Remarks: Notify Approvers:	15-Feb-2013			
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	Add Note	Remove	Request Approval	Show History	Update
Name	Description	Revision	Published	Publish	er	Approval Status	Review Requ	ester
PID.rtf	PID	1	15-Feb-20	13 Erik Aa	lbersberg			

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 (rej	ected)					
Document	Location	Status	Approver	Requester	Due Date 🚖	Remarks by Owner
Project_Initiation_Docum	ent Project Initiation Documer	t 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.
- 3.1.1.3.4.4 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.

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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.

	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> ab).

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	B Erik Aalbersbe	rg				

Minutes of meetings

3.1.1.3.5 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> 172. Only the basic functionality is explained in the manual. The logs available within the Principal Toolbox, are

- Issue log 64
- Risk log 66
- Quality review log 66
- Change log 68
- Daily / Action log 69
- Lessons learned log 70

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.

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Issue 7: Bug fou	und in version 7						Save	Cancel
Description:	Bug found in version	0	Owner:	John Ed	wards	•		
Type:	Off-spec	0	Creator:	Gerard I	Mesen			
Status:		c	Create Date:	04-Jul-2	005			
Priority:	11 -	F	Product / Plan item:	Pilot Pre	paration (Work	Package)		-
Due Date: Decision:	01-Apr-2010 Assigned	F	Remarks:	Initiatio Project Project Project Initial E Project	start-up n Stage Author Brief Mandate initiation Jusiness Case Authorisation Initiation Docu			[
Actions								
Nr Name	Descriptio	Owner		Due Date	Remark	s by Owner		
	nicate with er about bug status	0 Yung Ji-Lao	7: Bug found in version 7					
- 9 Please 1 error	try to reproduce	0 Jeroen van Barneveld	7: Bug found in version 7					
Discussions								
Creator (Date)	Message							
Documents (files, lin	iks, text)							
Name	Descript	n			Revision	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 found in version 7								
Person	Date	Object	Action	Change				

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

3.1.1.3.5.1 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	×	!	ĥ	XI	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.

550e 6. 510W III	ternet connection				Edit Back						
Description:	Slow Internet connection	Owner:		Samuel Davies	3						
Туре:	Issue	Creator	:	Gerard Mesen							
Status:	-	Create I	Date:	26-Aug-2005	26-Aug-2005						
Priority:	t	Product	/ Plan item:	Pilot Preparation	ot Preparation (Work Package)						
Due Date:	23-Apr-2010	Remark	s:	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					

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.

ssu	es				Edit	New	Remove	1	! 6		XI	Cop	y Mo	ove	* Open Iss	sues	•	View 0	Option	s
		Nr Description		D	А Туре		Decision		Owner			Produc	t / Plan i	tem	Due Dat	e	Remarks			
t	-	8 Slow Interr	net connection	0	1 Issue		Open		Samuel	Davies		Pilot P Packag		n (Wo	ork 23-Apr-2	2010	Contact I	T to find o	out wh	у
!!	7	7 Bug found	in version 7	0	2 Off-spec		Assigned		John Eđ	wards		Pilot Pi Packag		n (Wo	ork 01-Apr-2		Try to rep find the b		ne erro	ri
!	-	6 Delay in sy developme			2 Concern		Deferred		Jeroen v	an Barne	veld				17-Jun-3		Maybe we planning	e should	adjust	th
!	-	5 Request fo page layou	r change of the t	1	2 RFC		Approved		Yung Ji-	Lao		Pilot Pi Packag	eparatio e)	n (Wo	ork 30-Apr-2	2010	Look for r	new desig	jn	
!	7	4 Different p	age layout	0	1 RFC		No Action		Samuel	Davies		Update docum			01-Apr-2	2010				
t	-	3 Request fo backgroun		0	1 RFC		Resolved		Richard	Hammor	d	Requir	ements i	eport	28-May-	2010	Acquired	all the m	aterial	
	1	2 Request fo Macintosh		0	0 RFC		Investigatio	on	Samuel	Davies					19-Apr-2	2010				
Эосі	ımer	nts (files, links	, text)										Ac	ld .	Add Note	Remove	Show I	History	Upd	at
	Name	•		De	scription										Revision	Published	Publi	sher		

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.

3.1.1.3.5.2 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 🖌 ! 👔 🕼 Copy Move * Open Risks 👻 View Options 🗸
Description	: Give a description of the risk.
Туре	: Fill in the type of risk.
Status	: Fill in the risk status.
Priority	: Decide the risk priority.
Due date	: Final date where after risk measures need to be taken.
Decision	: The decision of the risk occurring.
Chance	: Chance of the risk occurring.
Severity	: Impact cause upon risk occurrence.
Owner	: Owner/responsible person for the risk.
Creator	: Author of the risk.
Product	: To which product is the risk related, leave blank when it is project related.
Remarks	: Any remarks concerning the issue.

- 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.

3.1.1.3.5.3 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:

- 1. 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	×	!	fi.	XI	Сору	Move	* Open Quality Reviews	•	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 quality 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.

Quality review 1: (Quality review			(Edit Back	
Description:	Quality review	Owne	r:	Peter Cole		
Status:	-	Creat	or:			
Priority:	1	Creat	e Date:	20-Feb-2005		
Due Date:	04-May-2010	Produ	ict / Plan item:	Database configured		
Method:		Rema	rks:			
Reviewer:	Samuel Davies					
Results:	Action Item(s)					
Actions Nr Name	Description	Owner	Related To	New * Op Due Date	en Actions Remarks	by Owner
Discussions						Ne
Creator (Date) M	essage					
Documents (files, links	, text)				Add	Add Not

Adding a quality review

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

3.1.1.3.5.4 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	~	!	f,	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 $\frac{\text{Daily}/\text{action log}}{69}$.

- 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.

Cha	nge	lo	g	at Apoll	o proje	ect											(Close	
Cha	nges				Edit	New	Remove	~	!	ĥ		XI	Сору	Move	* Open Ch	nanges	•	Viev	/ Options
		Nr	De	scription		B	A) Type		Owr	ner			Product /	Plan item	Due Da	te	Remarks		
1	-	2	Re	placement	Server	0	0 Specificati	ion	Joh	n Edw	ards		Database	e configure	d 09-May	-2010			
	-	1		ange in pla ecification	n or	0	0 Planning		Yun	ng Ji-Li	ao		Requirem	nents repor	t 04-May	-2010			
Doc	umer	Its	(file	s, links, te	ext)													Add	Add Note
	Name					De	scription								Revision	Published	Publi	sher	

Change log

3.1.1.3.5.5 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

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Name: Description: Status:	Communicate with customer about bug solving	Owner: Creator: Created:	Yung Ji-Lao Gerard Mesen 04–Jul-2005
Priority: Due Date:		Product / Plan item: Related To: Remarks by Owner:	No name 7: Bug found in version 7
Discussions Creator (Date)	Message		

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

3.1.1.3.5.6 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'.

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

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	earned 1: New Che	cklist				Edit Back 🗷 🛔
Name:	New Ch	ecklist	Remarks:		Use Ch	ecklist version 1.3
Descriptio	n:					
Creator:	Erik Aalt	persberg				
Created:	06-Apr-2	010				
Document	s (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.

3.1.1.4 Finishing a project

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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> [142] 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; 72
- removing a project or project model. 73

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

3.1.1.4.1 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.

Project Archive				Remove	Restore
Name 🌲	Objective	Project Manager(s)			
TreX project	Set-up of an environmental monitoring system	Gerard Mesen			
Programme / Project list A	rchive				
Project Model Archive				Remove	Restor
Name 🚔	Objective	Project Manager(s)			
Prince2 2009	Project model for larger and/or complex projects				

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

Name: Quality and Organisation projects Description: Projects for improving the organisa [more] Status: • Image: Status improving the organisa [more] Image: Status improving the organisa [more] Logs • • • • I Issue log • • • • Quality / Action log 2 • • • Automated Reports Edit Edit Project and status • I Issue log • • • • Projects New Import Export Move Model Archive • • • • • Automated Reports Edit • • • • Project Report • • •	ve * Dashboard • View O	Laan
New Total Current Stage Properss General 1 Issue log Apollo project Project initiation Image: Constraint of software on desktops 13-Aug-2010 2 Daily / Action log 2 Daily / Action log 2 Daily / Action log 10 Image: Constraint of all previous documents Automated Reports Editt Editt Project Project initiation Image: Constraint of all previous documents Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010 Image: Constraint of all previous documents 25-May-2010	ral Planning Hours Costs Project Manag	<mark>ger(s)</mark> Laan
Issue log Resk log Dollo project Project initiation Dolloy / Action log Dollo	Arjan van der l	Laan
R Risk log Project initiation A Daily / Action log 2 Juno Project Project initiation Juno Project Project initiation Automated Reports Edit Q Braiest Report Project start-up	• • • •	
A Daily / Action log 2 Juno Project Project initiation Back-up of all previous documents 25-May-2010 Venus project Preparation stage Automated Reports Edit Digitic plinisation project 24-Jun-2010 Zeus Project Project start-up	John Edwards	
Automated Reports Edit Project	😑 🥚 🕘 John Edwards	
Automated Reports Edit Usistic optimisation project 24-Jun-2010 Zeus Project Project start-up		5
Automated Reports Edit Logistic optimisation project 24-Jun-2010 Zeus Project Project start-up		
Zeus Project Deport	Peter Cole	
Project Papart		
Roll-out Zeus on clients 02-Sep-2010	😑 🥚 😑 Henk Visser	
Reports Project Models	Import Export	Archive
Programmes / Project lists Name 🚔 Objective	Owner(s)	
Projects Small Dripco2 project model Driving and all for any land midsion projects		
Products / Plan Items		
ssues Software implementation project model Prince2 project model for software implement		
Risks Standard Prince2 project model Project model for larger and/or complex proj Changes	projects.	

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.
- 3.1.1.4.2 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) [72].

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 I	list: Quality	/ and Organisatior	n projects				
Project Ar	chive					Remove	Restore
Name 🔶		Objective	Pr	oject Manager(s)			
TreX projec	t	Set-up of an er monitoring sys		erard Mesen			
Programm	ne / Project list	Archive					
Project Mo	odel Archive					Remove	Restore
Name 🌲		Objective	Pr	oject Manager(s)			
Prince2 200	19	Project model t complex project	or larger and/or ts				
Programm	ne Model Archi	ive					

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.

3.1.2 Generic PRINCE2 Project

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.

Project (Portfolio Man	agement) Properties
Name:	
Objective:	
Remarks by Owner:	
Project Manager:	Erik Aalbersberg
Start Project:	Start Project
Project Model:	PTB model 3.1

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.

Generic information about planning and managing a project is provided as part of the <u>classic project</u> planning 27.

3.1.2.1 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.

ant Costs	Resources								E
i Name									
Omega Project Project start-up Project start-up Project Start-up Project Binf Initation Stage Project initiation Project initiation Project initiation Project initiation Project antibution Project Authori Project		● Stage ● V	Vork Package			ement Produc	t Board Product Activity Default	Product Breakdown	Specialist Product
Project start-up Project start-up Project Mandat Project Brief Initiation Stage Project initiation Initiation Stage Project initiation Next stage plan Project Authors Project Author		Owner S	Start Planned	Final Planne	Sep 20 26. 2. 9.	13 6. 23. 30.	Oct 2013 7. 14. 21. 28.	Name	
Project start-up Project start-up Project Mandat Project Brief Initiation Stage Project initiation Initiation Stage Project initiation Next stage plan Project Authors Project Author			22-Aug-2013	06-Nov-2				- Omega Project	
Project Mandat Project Mandat Project Brief Initiation Stage Initiation Stage Project initiation Initiation Stage Project initiation Initiation Stage Project Initiation Project Authors Project Auth	t-up		22-Aug-2013			1		⊡ Breakdown ⊟ Summary	
Project Brief Initiation Stage Initiation Stage Initiation Stage Initiation Stage Project initiation Next stage plan Project Autorit Project Autorit			22-Aug-2013					Prod	
Initiation Stage Initiation Stage Initiation Stage Project Initiation Initiation Project Initiation Project Authorit Project Authorit Project Authorit Product 1 Product 1 Product 2 Highlight Report End Stage Rep Next Stage Authorit Next Stage Authorit			06-Sep-2013	18-Sep-2				Prod	
Project initiation Initial Business Project Initiation Initial Business Project Initiation Project Authors Project Authors Project Authors Product 1 Product 2 Highlight Report End Stage Repi Next Stage Aut	Stage Plan		19-Sep-2013	26-Sep-2				E- Main proc	
Initial Business Project Initiation Next stage plar Project Authorito Product 11 Product 1 Product 1 Product 2 Highlight Report End Stage Rep Next Stage Plan Next Stage Authority	Stage Authorisation		27-Sep-2013	27-Sep-2		•			
Project Initiation Next stage plan Project Authorit Execution stage G Work Package Product 1 Product 2 Highlight Report Next Stage Rep Next Stage Aut	ition		30-Sep-2013	03-0ct-2		4	1		product 2
Next stage plan Project Authors Project Authors Vork Package Vork Package Product 1 Product 2 Highlight Report End Stage Rep Next Stage Aut	iness Case		30-Sep-2013	02-0ct-2		-			
Project Authors Creation stage Product 1 Product 2 Highlight Report End Stage Rep Next Stage Aut	itiation Document (PID)		01-Oct-2013	02-Oct-2		-			
Execution stage Work Package Hended Stage Report Highlight Report Next Stage Plan Next Stage Aut	e plan		01-Oct-2013	01-Oct-2					
Work Packag Work Packag Product 1 Product 2 Highlight Report End Stage Rep Next Stage Aut Next Stage Aut	uthorisation		03-Oct-2013	03-0ct-2		•			
Product 1 Product 2 Highlight Report End Stage Rep Next Stage Plan Next Stage Aut	age		07-Oct-2013	28-0ct-2			ار ا		
Product 2 Highlight Report End Stage Rep Next Stage Plan Next Stage Aut	ckage		07-Oct-2013	24-0ct-2					
Highlight Repor End Stage Rep Next Stage Plat Next Stage Aut	uct 1		07-Oct-2013	17-0ct-2					
End Stage Rep Next Stage Plan Next Stage Aut	uct 2		11-Oct-2013	24-0ct-2					
Next Stage Plan Next Stage Aut	Report		25-Oct-2013	25-0ct-2			•		
Next Stage Aut	e Report		25-Oct-2013	25-0ct-2			•		
			25-Oct-2013	25-0ct-2			•		
Droject eleguro			28-Oct-2013	28-0ct-2					
			01-Nov-2013	06-Nov-2			\$		
Lessons Learn			01-Nov-2013						
	Action Recommendations		04-Nov-2013	04-Nov-2					
End Project Rep			05-Nov-2013	05-Nov-2					
Project Decomm	ecommissioning		06-Nov-2013	06-Nov-2					

Generic PRINCE2 Planning Model

Adding a planning item:

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.

Change Type 🔻	1
Stage	
Work Package	
Specialist Product	
Management Product	
Board Product	
Activity	

Planning a project:

- +	Project Brief	I
- +		
- +	Initiation Stage Plan	

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.

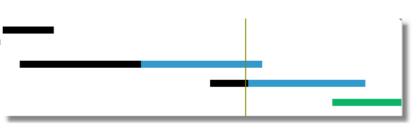


It is also possible to define milestones on the product page. The product page can be accessed via the 'Project Dashboard'.

Percentage Completed:

It is 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.

> **Note**: For summary items the % complete is calculated based on the duration of underlying plan items.



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.

2. It is possible to move a product by dragging and dropping the product.

3. Select the (specialist) product by using the ' \checkmark ' in front of the product.

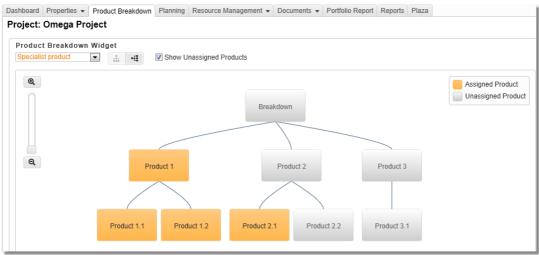
4. Define the hierarchy of the products by selecting

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'.

Produ	ct Breakdown	>>
X	← → Specialist Product	Ŧ
	Name	
	⊡… Omega Project	
+	⊡… Breakdown	
-+		
-+	Product 1.1	
-+	Product 1.2	
-+	Product 2	
-+	Product 2.1	
V +	Product 2.2	
-+	Product 3	
-+	Product 3.1	
-+		



Product Breakdown Structure with the Generic PRINCE2 Planning Model

Available buttons on the Gantt:

Following buttons are available on the Gantt planning:

- 1. Remove selected planning items.
- 2. Move selected planning items to the left.
- 3. Move selected planning items to the right.
- 4. Create dependencies between 2 products (use Ctrl+click,
- Shift+click or the ' \checkmark ' to select multiple products).
- 5. Remove a dependency.
- 6. Solve problems arising from conflicting dependencies.
- 7. Create an image of the Gantt as currently shown.

The image that is generated shows the project planning as currently shown in the browser including expanded/collapsed breakdown and/or planning items, time scale etc. It will however include the entire planning (no vertical clipping).

When clicking the button, a dialog appears which allows to copy the image to the clipboard or save it as an image file. The image can be used for reporting or printing.

Note: The actual image is in full resolution, it is only shown smaller within the dialog.

8. Determine the scale of the Gantt. It is now possible to zoom in, out or fit entire project planning within the available Gantt-width.

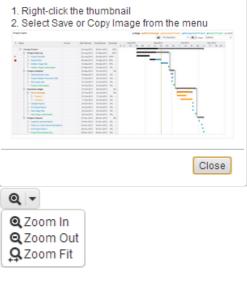
Note: As an alternative to zooming in/out etc. the timeline header can be clicked as well. The Gantt will zoom to the period that is clicked, e.g. when clicking on 'januari', the Gantt will zoom in to this period alone.

When right-clicking the timeline header, the zoom-level will be restored to the previous setting ('back').

Finally, a selection of the timeline can be made by clicking



Right-click to save or copy the image



the timeline at the start of the period to be selected and holding the mouse-button down while dragging the mouse to the end of the period. On release of the mouse-button, the timeline header will zoom to the selected period.

Setting baselines

It is also possible to set baselines.

- 1. 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.

Working with views

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

- 1. Click on Edit to edit the Gantt.
- 2. Click on and select 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 $\ensuremath{\textbf{Save as}}$ 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.

3.1.2.2 Planning 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.



antt	Costs	Resources										
roject Gant	tt					Stage Work				-		
								No Baseline	•	• Q • View	Default	-
i Nar	me		Start Planned	Final Planned	Planned Co Actual Cos	Aug 2013	Sep 20		Oct 2013		2013	
						1 5. 12. 19. 26.	2. 9. ⁻	16. 23. 30.	7. 14. 21	. 28. 4. 11	. 18. 25	
=	Omega Project		-	06-Nov-2013		V						
	Project start-u			27-Sep-2013			_	7				
	- Project Man			05-Sep-2013			_					
	- Project Brie			18-Sep-2013								
	 Initiation Sta 	-		26-Sep-2013	425							
		age Authorisation		27-Sep-2013				-				
	Project initiati Initial Busin		30-Sep-2013								=	
		ation Document (PID)	30-Sep-2013 01-Oct-2013	02-Oct-2013 02-Oct-2013								
	- Next stage		01-0ct-2013 01-0ct-2013									
	Project Aut		03-Oct-2013									
	Execution stag		07-Oct-2013					4		-		
	B- Work Pack			24-Oct-2013								
	Produc		07-0ct-2013 07-0ct-2013	17-0ct-2013					V			
	Produc		11-Oct-2013									
	- Highlight Re		25-Oct-2013									
	- End Stage I			25-0ct-2013								
	- Next Stage		25-0ct-2013									
	Next Stage			28-Oct-2013								
	- Next Stage	Autionsation	20-001-2013	20-001-2013							•	
ost Summa	ary											
រ												
inancial Cate		Budget	Planned	Actual								
∃− Summa	ary	1,00	00 9	970								
Cap	bex	50	00 4	475								
Ope	ex	50	00 4	195								

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.

1				Planned Costs
Omeg	ja Project			
P	roject start-up			
-	- Project Mandate			
-	··· Project Brief			
	Initiation Stage P	lan		
	Initiation Stage A	uthorisatio	n	
P	roject initiation			
ŀ	Project Initiation I	Document	(PID)	
	···· Next stage plan			
	- Initial Business C	ase		
	Initiation Document (PID)			×
Project Start Pla Final Pl Costs s	anned: 08-Feb-2013 lanned: 15-Feb-2013	Duration In Da Duration In Da		6 48
Start Pla Final Pl Costs s	anned: 08-Feb-2013 lanned: 15-Feb-2013		ays (hours):	6
Start Pla Final Pl Costs s Add Fi Financia	anned: 08-Feb-2013 anned: 15-Feb-2013 section	Duration In Da	ays (hours):	6 48
Start Pl Final Pl Costs s Add Fi Financia Capex	anned: 08-Feb-2013 anned: 15-Feb-2013 section inancial Category	Duration In Da Planned 5,000	ays (hours): Costs :	6 48
Start Pl Final Pl Costs s Add Fi Financia Capex	anned: 08-Feb-2013 anned: 15-Feb-2013 section inancial Category	Duration In Da Planned 5,000	ays (hours): Costs :	48
Start Pla Final Pl Costs s Add Fi Financia	anned: 08-Feb-2013 anned: 15-Feb-2013 section inancial Category	Duration In Da	ays (hours): Costs :	6 48

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

Note: if budget is editable for the project manager, the budget can be set here by double

clicking budget field in edit mode. Budgets are set on project level only!

Cost Summary			
٩			
Financial Category	Budget	Planned	Actual
⊡ Summary	1,000	970	
Capex	500	475	
Opex	500	495	

Summary section with costs

3.1.2.3 Planning Resources

On the tab 'Resources' it is possible to capture planned and budgeted hours per resource or skill.

Note: When a project is linked to a resource pool, see <u>resource allocation</u>, the allocated hours are shown and there is no budget in hours. However, when this link is not available, the budget for hours can be captured on the project itself by the project manager.

ntt	Costs	Resources												
oject G	antt						🖷 Stage 🏾 🖷 W				lanagement Produ		d Product	Activ
								F	No Baseli	ine	View	Default		
i	Name		Start Planned	Final Planned	Planned Ho A		Aug 2013 5. 12. 19. 1	Sep 2 26. 2. 9.		Oct 2013	Nov 21. 28. 4. 11	2013 . 18. 25	^	
	🗄 - Omega Pro	oject	22-Aug-2013	06-Nov-2013			V	_						
	Project	t start-up	22-Aug-2013	27-Sep-2013			2		- 1					
	- Pro	ject Mandate	22-Aug-2013	05-Sep-2013	214									
	- Pro	ject Brief	06-Sep-2013	18-Sep-2013										
	— Initi	ation Stage Plan	19-Sep-2013	26-Sep-2013										
	- Initi	ation Stage Authorisation	27-Sep-2013	27-Sep-2013										
	Project	t initiation	30-Sep-2013	03-Oct-2013]			=	
	— Initi	al Business Case	30-Sep-2013	02-Oct-2013										
	- Pro	ject Initiation Document (PID)	01-Oct-2013	02-Oct-2013										
	- Nex	kt stage plan	01-Oct-2013	01-Oct-2013										
	Pro	ject Authorisation	03-Oct-2013	03-Oct-2013						'J				
	Execut	ion stage	07-Oct-2013	28-Oct-2013						4				
	Ė− Wo	rk Package	07-Oct-2013	24-0ct-2013						V				
		Product 1	07-Oct-2013	17-Oct-2013										
		Product 2	11-Oct-2013	24-Oct-2013							-			
	— Hig	hlight Report	25-Oct-2013	25-Oct-2013							•			
	- End	d Stage Report	25-Oct-2013	25-Oct-2013							•			
	- Nex	kt Stage Plan	25-Oct-2013	25-Oct-2013							•			
	- Nex	kt Stage Authorisation	28-Oct-2013	28-Oct-2013							•		-	
source	e Summary													
cill		Resource	Pool		Plann	ned	Actual	Allocation						
- Sum	nmary					214								
		Cole, Peter	ICT P	ool		100								
		Edwards, John				10								
	Design		ICT P	ool		80								
L	Java		ICT P	ool		24								

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.

	Start				End				Hours per Day
<	0	1-Feb	-2013	3 🗃					
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	

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
	Add Calicer

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.

Final Planned: 31-Jan-2013 Duration In Days (hours): Resources Add Resource Add Skill Ho Skill Resource Planned Hours Project Manager ICT - 30	ours are spread over perio
Add Resource Add Skill Ho Skill Resource Planned Hours	
Skill Resource Planned Hours	
	Actual Hours
Project Manager ICT 30	
reject manager to t	
Software Engineer 120	
Consultant (Sr.) Arjan van der Laan 300	
Total 150	

The budget (or allocated), planned and actual hours will also be displayed on a summary section on the bottom of the 'Resources' tab.

Note: When a project is linked to a resource pool, the pool can be set for resources/skills that have no allocation set.

Resource Summary

Q					
Skill		Resource	Pool	Planned	Actual
÷	Summary			214	
		Cole, Peter	ICT Pool	100	
		Edwards, John		10	
	Design		ICT Pool	80	
	Java		ICT Pool	24	

Summary section with hours of resources

3.1.3 Single Sheet Project

As of release 5.0 a new project model has been made available. This project model is little more than a single page (sheet) that contains the most important project information. It is especially useful for portfolio management by providing a way of letting project managers report project portfolio information on a regular bases without requiring a full project planning within the Principal Toolbox. It can also be used to provide a low impact operational project reference that can be converted later on to a full project (with either classic or generic PRINCE2 planning [27]).

Starting up a new project with the single Sheet Project Model (also referred to as SSP 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 Management)							
Project (Portfolio Manag	gement) Properties						
Name:	Theta Project						
Objective:	Project that runs externally						
Project Manager:	Cole, Peter						
Start Project:	Start Project						
Project Model:	SSP Model						
Programme:	Projects ICT department						
OK Cancel							

Create a new project with the Single Sheet Project Model

Project Reporting

The project is now available on the programme and/or portfolio dashboard. If a report request is submitted to this project, the project manager will typically see this page for the project (with the request to update and publish the project information). See <u>portfolio reporting</u> for more information.

Dashboard 👻 Documer	nts															
Theta Project								Edit	Edit Prope	rties A	pply Mode	Edit	Members	Publis	h to Port	folio
Portfolio:		Demo Portfolio (EN)				Las	t Publis	shed On:	_							
Due date:		20-Sep-2013				Las	t Publis	shed By:								
Report Status:		X				Red	uest R	emarks:								
Forecast start date:		01-Sep-20	013													
General																
Name:		Theta Proj	ject				Pro	ject Ma	nager(s):	C	ole, Peter					
Objective:		Project the	at runs ex	ternally												
Status																
Status:																
Status Description:																
Planning																
Start Date:							Enc	Date:								
Financial																
Costs Budget:		Costs	0Actual:			Costs0Cor	ommitted: CostsRemaining:				ng:	Coststvariance:				
Finance Forecast															(Edit
Project Totals V Prece	ding P	eriod 🔽	Current P	eriod 🔽 Ti	ime scale	columns	Totals U	ntil 👿 🛛	Succeeding I	Period	e					
🔽 Budget 🔽 Actual 🔽 F	oreca	ast 🔽 EA	C 🔽 Es	timate 🔽 '	Variance	Forecast	start date:	01-Sep-2	2013							
							Precedir	ng Perio	bd							
			P	roject Tota	ls		< Jar	n (12)	Jan	(12)	Feb	(12)	Mar	(12)	Apr	(12)
Category	٠	Budget	Actual	Forecast	EAC	Variance	Budget	Actua	Actual	Forecast	Actual	Forecas	Actual	Forecast	Actual	Fore
S Filter by	¥															
Capex																
Costs of Internal Hours																
Opex																
							•	III								P.

Portfolio report request on Single Sheet Project

Note that the Single Sheet Project also allows for basic document management, see $\frac{\text{document}}{\text{management}}$

Apply model

If the project requires a more detailed planning, the project can be converted into a full project by clicking the 'Apply Model' button.

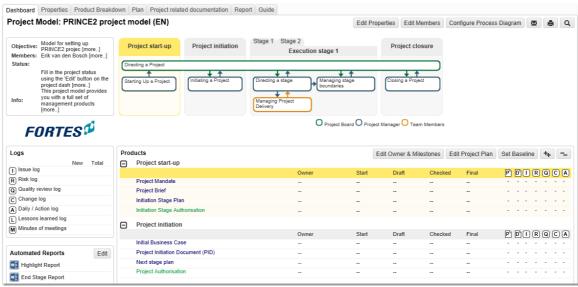
Edit Project	
Convert this Single S	Sheet Project to a PRINCE2 Project by selecting a PRINCE2 model.
Select a Model Project Model:	Generic PRINCE2 Planning Model
OK Cancel	

Apply model for Single Sheet Project

By selecting the required project model and clicking 'OK', the project will be converted to this new project model. Typically, the project can now be planned in detail, issues and risks tracked etc. See classic or generic PRINCE2 planning [27] for more information.

3.1.4 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 [33]) that matches most situations for these specialised projects.

In the next sections, you will find information about

- Editing project models 85
- Creating project models 86
- Moving project models

How to create automated reports is explained in the <u>Automated reports</u> 142 section.

3.1.4.1 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. Set mandatory items in the planning.
 - f. From the project dashboard, add templates to products.
 - g. Add <u>automated reports</u> 142 to your project dashboard.
 - h. Configure custom page layouts for the project properties and/or product / plan items.
- 4. When finished editing the project, navigate back to the programme / project list dashboard. Create the project model as described in the next section section.
- 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.

3.1.4.2 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	Move Model	Archive * D	ashboard		▼ View Options ▼
•	Current Stage	Progress	General Plann	ing Hours	Costs	Project Manager(s)
Apollo project Roll-out of software on desktops	Project initiation 19-Aug-2010		• •	٠	•	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		• •	٠	•	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.

3.1.4.3 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 Project	
Export a Project to a file. Choose whether to export documents / files and security information (members).	
Skip Documents / Files: Skip security 🔽 (users):	
OK Cancel	

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.

Choose whether to imp This is only usefull if the and the information was	on the import file. Provide a name and Project manager for the new imported Proje of documents / files. Choose also whether to import security information (member Project was exported using members that are known as users within this applical also included on export. oducts are not imported.	'S).
Select import options		
Skip Documents / Files:		
Skip security (users):	V	
Properties		
Name:	1	
Project Manager:	-	
Select import file		
mport file:	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.

3.1.4.4 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.

ome Portf	olio Management Organis	ation Resource All	ocation 1	Fime Entry	Import / Export			elp Supp	oort Setup
Organisation	n								
Dashboard	Documents & Knowledge	Lessons Learned	Models	Archive					
Organis	ation								
Project M	lodels					New	Import	Export	Archive
Name 🌲		Туре	Owner(s)) Obje	ective				
PRINCE2 2 standard	2009 modèle de projet	Prince2 Project			èle pour un projet NCE2				
PRINCE2	project model (EN)	Prince2 Project		Mod proje	el for setting up PRINCE2 ects				
PRINCE2	projectmodel (NL)	Prince2 Project			el voor het opzetten van NCE2 projecten				
PRINCE2 P	Projektmodell (D)	Prince2 Project		Proj	ektmodell (DE)				
Single She	et Project Model	Single Sheet Project							
TenneT Re	enSec Projectmodel				ect model voor grote en/of plexe projecten				
Programm	ne Models					New	Import	Export	Archive
Name 🌲		Туре	Owner(s)) Obje	ective				
MSP Progr	amme model v2				el for settung up an MSP ramme				

Enterprise models

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 93
- Managing portfolios 95
- Creating a portfolio model 99

These subjects will be covered in the sections below.

3.2.1 Working with portfolios

3.2.1.1 Portfolio overview

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

lome Portfolio Management Organisa	tion Resource Allocation	Time Entry Import	/ Export				Erik Aal	bersberg 👻 I	Help Supp	oort Setup
Portfolio Management > Portfolio Division	(UK)									
Dashboard Properties - Financials	Portfolio Gantt Document	s Archive								
Portfolio: Portfolio Division (^{ик)} (8)	Edit Propertie	Edit Members	Customise Page Te	Edit Field	Configuration	Edit Page Layou	t Edit Widge	ets 💌	≜ Q
Name: Portfolio Division (UK) Description: Status: Description:	Portfolio Overview Overview of all projects w Maximum amount of FTE					(9			
Automated Report	Projects (Portfolio Man	agement) Edit	New Send report re	quest Save as v	version Archiv	e Move	* Portfolio Ov	rerview	 View 0 	Options -
Importance vs R 2	Name	Current Stage	Project Manager(s)	Status Plan Statu		Costs E Status	ind Date			
	🚍 Apollo project	Project initiation	Arjan van der Laan	• •	•	9 1	6-Apr-2013			
Reports	∛o∕ Minsk		Ruud Peltzer	•	•	2	3-Jan-2011			
Projects (Portfolio Management)	🚍 Omega Project	Opstartfase	Erik Aalbersberg	•	•	-				
Products / Plan Items	🚍 Venus	Preparation stage	Peter Cole	•	•	. 1	8-Aug-2010			
Issues Risks	Zeus Project	-		•	•	•				
Changes Actions	Previous versions					Remo	ve * All Previous	Versions	 View (Options -
Lessons learned Cost / Hour Entries	Name	Saved O	in Saved By	Remarks by O	wner					
Entries	March 2010	6) 23-Mar-2	2010 Erik Aalbersber	g						
-	April 2010	23-Mar-2	2010 Erik Aalbersber	g						
Timeline Reports 4	Report Models	-		\frown				New Import	Export	Archive
	Name 🔶	Objective		5)						
	Monthly Report		Progress Report							
	Weekly Report	Weekly I	Progress Report							

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 142 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 forecas	st.	
Portfolio Gantt	:	shows all the portfolio items in a Gantt based on their start
and end dates.		·
Documents	:	a common repository for all documents relating to the
portfolio and their items.		
Archive	:	lists all the archived portfolio items, and allows for items to be
deleted or recovered from the	ne 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.		
Edit members	:	to change who gets full or read access to the portfolio
Customize Page Text	:	for customizing the introductory text on the portfolio's
dashboard		
Edit Field Configuration	:	the field configuration determines how data needs to be
synchronized between project		ortfolio item.
Edit Page Layout		edit the page layout of portfolio items, letting the portfolio
manager determine what field	ds are in	nportant and how to display them.
Edit Widgets	•	Add and edit widgets on your portfolio dashboard.
-		

3.2.1.2 New portfolios

3.2.1.2.1 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	perties	Edit Me	mbers	ustomise	Page Tex	t 🗷	ē.	Q
Automated Reports	Edit	Portfolios			New	Archive	Create	e Model	* Dashboa	ard	-	View	Optior	s
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 Managemer	nt)	Portfolio Division (UK)	•	Ruud Peltzer										
Products / Plan Items Issues														
Risks														
Quality reviews		Portfolio Dashboards					New	Archive	* Dashboa	ard		View	Option	s
Changes		Name 🔺												
Actions		No. And Anna		Description					Status		io Manag	er(s)		
Lessons learned		Portfolio Dashboard - Fortes		Fortes Solutions Dashboard						•	Henk \	/isser		
Cost / Hour Entries Entries														
Entries														
		Portfolio Models									Import	Export	Arcl	ive
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.

3.2.1.2.2 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: <u>Creating portfolio items</u> of .

Each type of portfolio item has its own icon:

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

3.2.1.2.3 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.

Projects (Portfolio Ma		ew Send report requ	est Save	e as version	Archive	Move	* Portfolio Overview	View Options
Name	Current Stage	Project Manager(s)	Status	Planning Status	Hours Status	Costs Status	End Date	
🚍 Apollo project	Project initiation	Arjan van der Laan	•	•	•	•	16-Apr-2013	
∛ç- Minsk		Ruud Peltzer				•	23-Jan-2011	
🚍 Omega Project	Opstartfase	Erik Aalbersberg		•	•	•		
⊒ Venus	Preparation stage	Peter Cole	•	•	•	•	18-Aug-2010	
E Zeus Project			•	•	•	•	-	

Starting a project on the portfolio

- 2. Enter a name for the Portfolio Item, and the objective and remarks (optionally).
- 3. 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> 33.

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.

Project (Portfolio Mana	agement) Properties
Name:	
Objective:	
Remarks by Owner:	
Project Manager:	Henk Visser
Start Project:	Start Project
Project Model:	PRINCE2 project model (EN)
	Production (EN)

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 depicting 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.

3.2.1.3 Portfolio administration

3.2.1.3.1 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.

ome Portfolio Management Organis	ation Resource Allocation T	ime Entry Import /	Export					ersberg 🔻 He	ip Support	t Setup
Portfolio Management > Portfolio Division	I (UK)									
Dashboard Properties - Financials	Portfolio Gantt Documents	Archive								
Portfolio: Portfolio Division	(UK)	Edit Properties	Edit Members	Customise Page Text	Edit Field Config	uration	Edit Page Layout	Edit Widgets		۹ Q
Name: Portfolio Division (UK) Description: Status: Status Description:	Portfolio Overview Overview of all projects withi Maximum amount of FTE av	ailable is 13. If more	is needed, hiring	will be necessary.	x					
Automated Reports Edit	Proj Move Project	ts (Portfolio M	anagement)	/AddEditFolder.jsp?PageD between Portfolio (Portfolio Management) to	S rs Ct	atus	Portfolio Ove End Date 16-Apr-2013 23-Jan-2011	rview 🗸	View Opt	otions 👻
Projects (Portfolio Management) Products / Plan Items Issues Risks	= 0	s (Portfolio Manag	ement) to move				 18-Aug-2010 			
Quality reviews Changes Actions Lessons learned Cost / Hour Entries Entries	Prev Name Marc April	Portfolio	Divisie (NL)	V		Remov	e * All Previous *	/ersions 🛛 🔻	View Opt	otions -
Timeline Reports Entries	Rep Name	Portfolio Portfolio Portfolio	lio Management Divisie (NL) Division (DE) Division (FR) Division (UK)				Ne	w Import	Export	Archive
	Monthly Report Weekly Report		rogress Report rogress Report							

Moving a project

3.2.1.3.2 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
- 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
A 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

3.2.1.3.3 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 Propertie	s 👻 Financials	Portfolio Gantt	Documents	Archive			
Portfolio: Portfo	olio Division (UK)					•
Person	Date	Object			Action	Change	
Erik Aalbersberg	11-Oct-2011	Portfolio Di	vision (UK)		Change	Name=Portfolio Division (UK)	
Erik Aalbersberg	11-Oct-2011	Portfolio Di	vision (UK)		Change	Name=R&D Portfolio	

History Tab on a portfolio item

3.2.1.3.4 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.

ties 🔻	Financials	Portfolio Gantt	Documents	Archive							
folio	R&D (UK	.)								Q	
	New	Current folder:	Knowledge	Repository						Edit	
ository											
Subfolder			Documents (files, links, text)					Remove	Show History	Update	
		Name			Description	escription Revision			Published Publisher		
		Resource_a	Resource Over	Erik Aalbersbe	erg						
		Balanced_Score_Card.xls Training_Functioneel_Beheer y3 print versi.			Balanced Score	Card	1.4	11-Nov-2011 Erik Aalbersberg			
					Expert Training 3.2			11-Nov-2011 Erik Aalbersberg			
		folio R&D (UK New	folio R&D (UK) New Current folder: Documents (fi Name Resource_e Balance_S	folio R&D (UK) New Current folder: Knowledge ository Documents (files, links, tex Name Resource_allocation .v5.dd	folio R&D (UK) New Current folder: Knowledge Repository Documents (files, links, text) Name Resource_allocation_v5.doc	folio R&D (UK) New Current folder: Knowledge Repository ository Documents (files, links, text) Name Description Resource_allocation_v5.doc Resource Oven Galanced_Score_Card.xis Balanced Score	folio R&D (UK) New Current folder: Knowledge Repository Documents (files, links, text) Add Name Description Resource_allocation_v5.doc Resource Overview Balanced_Score_Card.xls Balanced Score Card	New Current folder: Knowledge Repository Documents (files, links, text) Add Add Add Add Add Add Name Description Revision Revision	folio R&D (UK) New Current folder: Knowledge Repository Documents (files, links, text) Add Add Note Remove Name Description Revision Published Resource_allocation_v5.doc Resource Overview 11-Nov-201' Balanced_Score_Card_xis Balanced Score Card 1.4 11-Nov-201'	folio R&D (UK) New Current folder: Knowledge Repository Documents (files, links, text) Add Add Note Remove Show History Name Description Revision Published Publisher Resource_allocation_v5.doc Resource Overview 11-Nov-2011 Erik Aalberabe Balanced_Score_Card .xls Balanced Score Card 1.4 11-Nov-2011 Erik Aalberabe	

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 [59].

3.2.1.3.5 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.

3.2.1.3.6 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.

Portfolio: Portfolio Division	(UK)	Edit	Properties	Edit Members	Customis	se Page Text	Edit Field C	onfiguration	on Ec	lit Page Layout	Edit Widgets		
Name: Portfolio Division (UK) Description:	Portfolio Overview Overview of all projects wit												
Status: Status Description:	Maximum amount of FTE a	ivailable is 13). If more	is needed, hiring wil	l be neces	sary.							
Automated Reports Edit	Projects (Portfolio Mana	agement)	Edit	New Send report	request	Save as version	on Archive	Move		* Portfolio Ove	rview 🔻	View	Options
Importance vs Risks	Name	Current Stag	e	Project Manager(s)	Status	Planning Status		Costs Status	End Da	ite			
	Apollo project	Project initiat	ion	Arian van der Laan		Status			16-Apr-	2013			
Reports	-⊘- Minsk			Ruud Peltzer			-		23-Jan-	-2011			
reports Projects (Portfolio Management)	Omega Project	Opstartfase		Erik Aalbersberg				•					
Projects (Pontolio Management) Products / Plan Items	= Venus	Preparation s	tage	Peter Cole					18-Aug	-2010			
ssues Risks	🕄 Zeus Project	-	2		•	•	•	•					
Auality reviews Changes Actions	Previous versions							Re	move	* All Previous	/ersions	View	Options
essons learned	Name		Saved On	Saved By	Rem	arks by Owner		110	move	7411101045	GIGIGIIG	100	options
Cost / Hour Entries	March 2010		23-Mar-201			and by Owner							
.110105	April 2010		23-Mar-201		2								
Timeline Reports												_	_
Intries	Report Models									Ne	w Import	Export	Archiv
	Name 🔶		Objective										
	Monthly Report	1	Monthly Pr	ogress 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.

3.2.1.4 Managing a portfolio

3.2.1.4.1 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 [142] 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 [138].

3.2.1.4.2 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 [100]'.

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:

- 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.

ome Portfolio Management Organis	ation Resource Allocatio	n Time Entry Import	/ Export				Erik Aalt	iersberg 🔻 Hel	p Supp	ort S	etup
ortfolio Management > Portfolio Division	I (UK)										
Dashboard Properties - Financials	Portfolio Gantt Docume	ents Archive									
Portfolio: Portfolio Division	(UK)	Edit Proper	ties Edit Members	Customise Page	Text Edit Fie	ld Configuration	Edit Page Layout	Edit Widgets		ē.	٩
Name: Portfolio Division (UK) Description: Status: Status Description:	Portfolio Overview Overview of all projects Maximum amount of FT										
Automated Reports Edit	Projects (Portfolio M	anagement) Edit	New Send report	rt request Save a	s version Arc	hive Move	* Portfolio Ov	erview 💌	View (Option	s -
Importance vs Risks	Name	Current Stage	Project Manager(s)	Status Pla	nning Hours lus Status	Costs E Status	ind Date				
Reports Projucts (Pontfolio Management) Products / Plan Items Issues Risks Quality refeves Changes Actions Lessons learned Cood / Hour Enthies Enthies Timeline Reports Enthies	 Apollo project ☆ Minsk ☆ Minsk ☆ Omega Project > Venus ☆ Zeus Project > Previous versions Name March 2010 Report Models Name ⊕ Mome Merch Weekly Report 		A/Principal/online/Fo Request quast for the selected st day of the selected	Ider/functions/Add	ditFolder.jsp?P	ageDef=Portfolio art Date will be	010 All Previous	Versions V	View (
		Due date Request Remarks Send notification I OK Cancel	by e-mail	15-Feb-2013			•				

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.

				 Documents - 							
Apollo Project										Save	Cance
Portfolio:	Portfolio ICT (NL)							Last Published On:	28-Feb-2011		
Due date:	29-Jan-2013							Last Published By:	Erik Aalbersberg		
Report Status:								Request Remarks:	Linchastropolg		
Forecast start date:	01-Jan-2013										
Properties											
General											
Name:	Apollo Project										
Project Manager(s):	Peter Cole										
Start Date:	28-Dec-2012										
End Date:	03-Apr-2013										
Progress											
Tijd:	• •				Status (Tij Status (Ge						
Geld:	• •				Status (Pla	nning):					
Planning:					Status (Re	sources):					
Resources:											
Financial	-										
Budget:		Actu	1:		ETC:			EAC:			
-	150.000.00			100,000.00			7	5.000.00		175.000.00	

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:



Report request pending; hasn't been submitted yet

The report request was received and the report has been submitted

Report request pending; report submission is overdue

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.

Projects (Portfolio N	lanagement)	New Send re	port request	Save as version Archi	ve Move 💌	Report Request	▼ View Options ▼
Name	Request Date	Due date	Report Status	Last Published By	Last Publis	hed On Report Model	
Apollo project	21-Oct-2010		X	Jeroen van Barnev	reld 16-Apr-201	0 Monthly Report	
ିଙ୍ଗୁ- Minsk							
🚍 Omega Project	15-Feb-2013	18-Feb-2013	X			Monthly Report	
🖵 Venus	23-Apr-2010	01-Apr-2010	•			Monthly Report	
😤 Zeus Project	16-Apr-2010	28-Apr-2010	1	Erik Aalbersberg	04-Oct-201	0 Monthly Report	

The dashboard shows the status of the report request

3.2.1.4.3 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 'Financial configuration' rost for more details on how to configure the financial overview.

	Properties -					740														
Portfolic	o: Portfolio	Divisio	n (DE)													Financ	e Configu	ration	Set Curre	nt Perio
well as the	nce overview fo he preceding an n on dates).																			
Finance																				Edit
Project	t Totals 👿 Pred	eding Peri	od 🔽 Curren	Period	Tim	e scale co	lumns 🔽	Succeedi	ng Period	i + ₊	🖴	Select of	olumns to	display						
Reserv	ved 📝 Budget	Actual	Forecast	EAC	E	stimate [Varian	e												
										Precedin	g Period									
							Projec	t Totals		< Jar	ı (13)		Jan (13)			Feb (13)			Mar (13)	
Typ Pr	oject > Category	/ 🔶	Forecast si 🔶	Last Pul	olis 🔶	Budget	Actual	Forecast	EAC	Budget	Actual	Budget	Actual	Forecast	Budget	Actual	Forecast	Budget	Actual	Foreca
Filte	er by		Ø ~	8	9															
∃ 🗄 – A	pollo																			
👰 🗄 M	linsk																			
F 🗄 🗸 V	enus																			
📋 🗄 – Z	eus																			

The financials overview on the portfolio

3.2.1.4.4 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.

3.2.1.4.5 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 Pro	operties 👻	Financial	Portfolio	Gantt	Documen	ts Archi	ve														
Portfolio: Po	ortfolio	Divisio	n (UK)																		
This Gantt she	iows project	ts and idea	s as part of	this po	rtfolio.																
Portfolio Gantt	t																				Edit
Select columns to	display	Timesca	le: Months	and wee	ks	- 🚔															
Typ Projects and	Ideas	🔶 Si	art Date	🗦 End I			ay 2010	Jun 2		Jul 2010		Aug 2010		Sep 20		Oct 2			ov 2010		Dec 20
					1	19.26.3.	10. 17. 24	4.31.7.1	14. 21. 28	. 5. 12. 19	. 26. 2.	. 9. 16. 2	3. 30.	6. 13.	20. 27	. 4. 11.	18. 25.	1. 8	3. 15. 22	2. 29. (5. 13.
Filter by		8		- 😳																	
Apollo project	t		31-Dec-201	2 16	6-Apr-2013																
💡 Minsk			27-Sep-201	0 23	3-Jan-2011										-						
Omega Project	ct																				
Venus			05-Apr-201	0 18	-Aug-2010																
Zeus Project																					
						4			_												

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.

3.2.2 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> 142) 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	Financials	Portfolio Gan	tt Documents	Archive								
Portfolio	Model:	Portfolio N	lodel - IT	Edit Properties	Edit Members	Customise Page	Text Edit Field Cor	figuration	Edit Page Layout	Edit Widgets		
Name:	Portfolio	Model - IT										
Descriptio	on:											
Status:	•											
Status Descriptio	on:											
Automated	d Reports	Edit	Projects (F	Portfolio Manage	ment)			New	All Projects	-	View	Options
Importa	ance vs. Risk		Name		Last Published Cu On	irrent Stage	Project Manager(s)	Status	Planning Hour Status Statu		End	Date
Reports			Previous v	ersions					* All Previous \	/ersions -	View	Options
Projects (Po Products	ortfolio Manag	ement)	Name		Saved Or	Saved By	Remarks by Ov	/ner				
Issues												
Risks Quality revie	ws		Report Mo	dels					Ne	w Import	Export	Archive
Changes			Name 🌧		Objective							
Actions Lessons lear			Monthly Rep	ort	Monthly s	tatus update						
Cost / Hour			Weekly Rep			atus update						
Entries	Entribo				,							
	.											
Timeline R	reports											

Example portfolio model

3.2.2.1 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.

o Model: Portfolio Model - l'	Edit Properties Edit Member	S Customise Page Te	xt Edit Field Configuration	Edit Page Layout Edit Widgets	
Portfolio Model - IT					
ion:					
ion.					
			-		
Principal Toolbox® (Demo) - Window	vs Internet Explorer provided by Princip	pal Toolbox		0	
Change Page Layout					-
				Save	Cancel
Here you can change the page layo		to the page layout section	n.		
Default page layout (deletes custom	layout)				
Custom page layout				Layout Components	
Page layout				Available Page Components	
				Page section	
Algemene informatie		â â	λ.	age section	
Name					
Objective			Remove	Grid	
Project Manager(s)				L	
Project Board - Executive			Add		
Project Board - Senior User			7.00		
Project Board - Senior Supplier				Available Fields	
Status Description				Baseline	-
Remarks by Owner			add a new section drag one	Current Baseline Final	
			om the available sections on the	Current Baseline Set	=
1		ni le	ht to the page layout on the ft. After that you can add fields	Current Baseline Start	
Planning		i fr	om the available fields section.	Initial Baseline Final	
Start Date	Status		om the available fields section	Initial Baseline Set Initial Baseline Start	
End Date	Planning Status		ick on a category title and drag	Initial Baseline Start	
Progress	Hours Status		to the page layout to add a implete category of fields as a	Costs	
			w section.	Actual	
		i	o remove a section click on it's	Costs Actual	
		tr	ashcan icon. To remove fields	Costs Actual Cumulative	
Kosten			mply drag them out of the	Costs Budget	
Costs Budget Cumulative	Costs Actual Cumulative	St	ection.	Costs Budget Cumulative	
Costs Committed Cumulative	Costs Remaining Cumulative			Costs Committed Costs Committed Cumulative	
				Costs Committed Cumulative Costs EAC	
				Costs EAC Costs Forecast	
Uren		~		Costs Planned	
	,	(in the second sec		Costs Planned Costs Remaining	
Hours Budget	Hours Actual			Costs Remaining Costs Remaining Cumulative	
Hours Committed	Hours Remaining			Costs Reserved	
				Costs Status	

Editing the page layout

3.2.2.2 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 left-hand side to build a custom page layout to be used in the reporting model.

Change Page Layout					Save	Cancel
Here you can change the pag	e layout. You can drop sections, components	and fields into the page lay	out section.			
Default page layout (deletes ci	ustom layout)		_			
Custom page layout				Layout Components		
Page layout			1	Available Page Compo	nents	
Overall				Page section		
Name						
Objective			Remove	Grid		
Status			4			
Status Description						
Project Manager(s)			Add			
Project Board - Executive			4	Available Fields		
Remarks				Baseline		
		To add	a new section drag one	Current Baseline Final		
'		from th	e available sections on the	Current Baseline Set		
Planning		right to left. Aft	the page layout on the .	Current Baseline Start		
	, ,	from th	e available fields section.	Initial Baseline Final		
Start Date	Planning Status	Erom H	a available fields section	Initial Baseline Set		
End Date			a category title and drag	Initial Baseline Start		
Progress		it to the	page layout to add a	Capacity planning		
		comple	te category of fields as a	IT Capaciteit		
				PM Capaciteit		
Hours			ove a section click on it's n icon. To remove fields	~ /		
Hours Budget	. 'Hours Status	simply	drag them out of the	Costs Budget		
Hours Actual		section		Costs Actual		
Hours Remaining				Costs Actual Cumulative		
				Costs Budget		
İ				Costs Budget Cumulative		
				Costs Committed		
Costs		iii ii		Costs Committed Cumulat	ive	
Costs Budget	Costs Status		L	Conto EAC		
Costs Actual						

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> 103 for more information.

3.2.2.3 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.

Portfolio: Portfolio D	ivision (UK)		Edi	t Propertie	IS E	dit Members Cus	tomise Page Text	Edit Field Co	nfiguratio	n E	dit Page La	ayout	dit Widget	s 💌	
Name: Portfolio Divisio Description: Status: Status Description:	n (UK)		projects within				nd required FTE per led, hiring will be nea									
Automated Reports	Edit	Projects (Po	rtfolio Manage	ement)	Edit	New	Send report reque	est Save as vers	ion Archive	Move		All Proje	cts	ŀ	View	Options -
Importance vs Risks		Name			Last Publ On	ished	Current Stage	Project Manager(s)	Stat	us	Planning Status	Hours Status	Costs Status	End [Date
		🚍 Apollo pre	oject		16-Apr-20	010	Project initiation	Arjan van der Laa	in						16-Aj	or-2013
Reports		· Minsk						Ruud Peltzer						•	23-Ja	n-2011
		- Omega Pr	roject				Opstartfase	Erik Aalbersberg								
Projects (Portfolio Management Products / Plan Items)	- Venus					Preparation stage	Peter Cole				-	-		18.41	Ja-2010
ssues		Zeus Proj	act		04-Oct-20			T CICI OVIC								19-2010
Risks		S= 2003 PTOJ	601		04-001-20	10				•		•	•	•		
Quality reviews																
Changes		Previous ver	alana.							De			ious Vers	less l	A.C.	Ontheres
Lessons learned			sions							Rei	nove	- All Prev	lous vers	lions	View	Options
Cost / Hour Entries		Name			Saved On			emarks by Owner								
Entries		March 2010			3-Mar-201		Erik Aalbersberg									
		April 2010		2	3-Mar-201	0	Erik Aalbersberg									
Timeline Reports																
intries		Report Mode	els										New	Import	Export	Archive
		Name 🌲		(Objective											
		Monthly Repor	rt	M	Aonthly Pro	aress	Report									
		Weekly Report			Veekly Pro											

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.

		f custom fields and syst nfiguration are shown in									
custom Fields S	system Fields										
Custom Fields										Save	Cance
Category	Name	Portfolio Availability		EditLevel		Behavior		Project Availability		EditLevel	
Capacity planning	IT Capaciteit	Available	-	Editable	-	-	-	Available	-	Editable	
Capacity planning	PM Capaciteit	Available	Ŧ	Editable				Available	Ŧ	Editable	
Costs	Budget	Not Available	-	Editable			-	Available	-	Editable	
Costs	EAC	Not Available	Ŧ	Editable	-	-	-	Available	Ŧ	Editable	
Costs	ETC	Not Available	Ŧ	Editable	-	-	-	Available	-	Editable	
Finance	Total Actuals	Available	Ŧ	Not Editable	-	Synchronized	-	Available	-	Not Edita	ble
Finance	Total Budget	Available	Ŧ	Not Editable	-	Custom	-	Available	-	Not Edita	ble
Finance	Total Forecast (portfolio)	Available	Ŧ	Not Editable	Ŧ	Custom	Ŧ	Not Available	Ŧ	Not Edita	ble
Finance	Total Forecast (project)	No Local Configuration Not Available		Not Editable	Ŧ	-	-	Available	•	Not Edita	ble
Finance	Total Reserved	Available		Not Editable	-	Custom	-	Available	-	Not Edita	ble
	Actions Project Manager	Not Available	Ŧ	Editable	Ŧ	Ì	•	Available	Ŧ	Editable	
	Assigned manually	Not Available	-	Editable	-	-	•	Available	-	Editable	
	Belang	Not Available	-	Editable	-		-	Available	-	Editable	
	Decision to be made	Not Available	Ŧ	Editable	-	İ-	-	Available	-	Editable	
	Delta Lloyd	Available	Ŧ	Editable	-	-	-	Available	-	Editable	
	Hours	Not Available		Editable				Availabla	-	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
	Synchronized	The field will be synchronized from portfolio to project level, or the other way around (one way only)
Behaviour	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.

3.2.2.4 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'.

Project Totals 🖉 Preceding Period 🗑 Current Period 👰 Time scale columns 😨 Succeeding Period 🕴 ++ 🚽 🚘 Select columns to display		oject > Category	/ 🔺 F	orecast st ⊜	Last Pul	blis 🔒 Re	eservec Bu	dget Actual	Forecast	EAC	Variance	Reserved	Budget	Actual	Actual	Actual	Actual	Α
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview shows me invance information for the current financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project otals summarise all available information (no restriction on dates). ance Project Totals Preceding Period Current Period Cur								Proje	ct Totals				< Jul (13)		Jul (13)	Aug (13)	Sep (13)	0
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview shows merimancial momention for the urrent financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project tals summarise all available information (no restriction on dates). ance Project Totals Preceding Period Current Period Time scale columns Succeeding Period +, -, Select columns to display												Prec	eding Pe	riod				
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview snows me imancial mormation for the current financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project otals summarise all available information (no restriction on dates).	Reserv	/ed 👿 Budget	Actual	Forecast	EAC	Estin	nate 👿 V	ariance										
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview snows me imancial mormation for the urrent financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project otals summarise all available information (no restriction on dates).	Project	t Totals 👿 Pred	eding Period	i 👿 Current	Period	Time s	cale column	s 👿 Succee	ding Period	++	🖴	Select co	olumns to	display				
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview snows me imancian mormation for the urrent financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project	inance																	Edi
The finance overview for the portfolio shows information on budgets, actuals and commitments as well as the latest forecast. The overview snows me imancian mormation for the urrent financial period as well as the preceding and succeeding periods (if configured). The current period can be set using the 'Set Current Period' function. Note that the project																		
							eriods (if co	onfigured). Th	e current p	eriod car	n be set us	sing the 'S	et Currer	it Period'	function.	Note that	the proje	ct
rtfolio: Portfolio Division (UK) Finance Configuration Set Current Per	The finar	nce overview fo	r the portfol	io shows info	rmation o	on budget	s, actuals a	and commitm	ents as wel	I as the I	atest fored	cast. The	overview	snows in	e iinancia	rinormati	ion for the	e
	ortfolic	: Portfolio	Divisior	i (UK)									Fi	nance Co	onfiguratio	n Set (Current P	erio

Finance Configuration

- 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
and / or next financial p	period	
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

Configure Finance Process		
		overviews. The current financial period is based on the 'current period start' date. Select the categories to use when this is permitted at a higher level (Portfolio model).
OUse configuration from related portfoli OUse custom configuration	o (model)	
Set Financial Periods		
Current financial period		
Starts on first of:	July	
Time scale:	Per month	×
Duration:	1	▼ years
Preceding financial period		
Show preceding period?	~	
Summarise all up to current period:	⊚Yes ⊙No	
Succeeding financial period		

Show succeeding	ig period?	×							
Summarise all a	fter current period:								
Time scale:		No Per quarter	•						
Duration:		2	▼ years						
Set Behaviour									
Configure how	v to work with the differer	nt financial types. Ch	loose behaviour of t	he type an	d in what leve	l of detail the inforn	nation shoul	Id be shown for the current pe	riod.
	Behaviour							Level of detail current period	I
Reserved:	Editable by portfolio mana	ger, not visible by pro	ject manager				-	Single value, complete current	-
Budget:	Editable by portfolio mana	ger, visible by project	manager				-	Single value, complete current	-
Actual:	Visible by project manage	r and portfolio manage	er, values are importe	d / from time	e sheets		Ŧ	Per time scale, complete currer	nt 🖵
Committed:	Not used						-	Per time scale, complete currer	nt 🗸
Forecast/EAC:	Editable by project manag	er and published to p	ortfolio manager				-	Single value, complete current	-
et Financial Ca	-								
	-								
Use selected (
Selected Ca Capex Opex		External	Categories:						
	ions overview will always sho nany categories are sele	cted the performanc		ose whethe	r to show oth	er (selected) catego	ories as well	l.	
Also show categ	jories without data	V							

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.

onfiguration							
Options ++	– Manage Financial Cat	tegories					
Principal Toolbox	Financial Categories		New	Remove	* All Categories	•	View Options
Notifications	Name 🌧	Description					
MS Project integration	Capex						
Conversions	Opex						
Manage Hour Rates							
Project Plaza Currencies							
Resource Categories							
Financial Categories							
Manage Rossaross							
Manage Skills							
Time Entry							
Manage entries							
Manage Non-project Activity Sets	3						
Resource Allocation							
Customize fields							
Approval entries							

Creating financial categories

3.2.3 Using portfolio dashboards

Portfolio dashboards are a way of providing a cross-portfolio view on the projects that are running within an organisation. As an example, this could be used to list all projects related to a specific business unit, service or product. Within an portfolio dashboard, reporting facilities are available to create a tailored reporting model for the scope of the dashboard.

Note: A portfolio dashboard primarily provides viewing information, it does not allow to modify

information.

To define the projects that will be listed within a portfolio dashboard, the so-called 'dashboard filter' needs to be set. Click 'Set Dashboard Filter' and the filter widget appears to define the selection criteria for the dashboard. Once set, click OK to activate the dashboard filter.

dit Properties Edit Members	Customise Page Text	Set Dashboard Filter	Edit Widgets 🛛 🔛	8
ilter				×
		s	witch to Advanced Filt	er
Location C × - Equals (p	recise) 🔹 Ams	sterdam		×
Programme Progress Project Project (Portfolio Management) Project Assurance Project Board - Executive Project Board - Senior Supplier	Q ^			
Project Board - Senior User Project Color Project Manager(s) Project Model Project Number	Ξ]		
Project Specific Tolerances Project Support	-		OK Cano	el

Buttons and dashboard filter

Only the so-called Dashboard owner (or administrators) may set the dashboard filter. Other roles on the portfolio dashboard are shown below.

Role Permissions

Dashboard ownerCan set the dashboard filter and modify the portfolio dashboard (views, reports etc.).

Note: The viewing permissions of the dashboard owner are used to identify the list of projects for the portfolio dashboard.

A common scenario is to have the dashboard owner someone that coordinates the portfolio management setup, or an administrator. By setting the correct dashboard filter, other users can see the information they need.

- Dashboard managers cannot alter the dashboard filter but otherwise have full permission (except to edit project information as a portfolio dashboard is used for viewing/reporting). Dashboard managers are allowed to create views, reports etc.
- Dashboard Dashboard readers only have viewing access to the portfolio dashboard but cannot define additional reports.

Members for these roles can be set using the common 'Edit Members' dialog.

elect members			
Dashboard Owner	<- Add Remove ->	Available users Q Schm Arne Schmidt	
Dashboard Manager	<- Add Remove ->		
Dashboard Reader	<- Add Remove ->		

Edit members on portfolio dashboard

A portfolio dashboard has the same setup as a normal portfolio but lacks following functionality:

Functionality Create/start projects	Remarks A portfolio dashboard only shows existing (portfolio) projects and does not allow to create or start new projects.
Report requests	Portfolio reporting is done through the base portfolio of a portfolio project and cannot be initiated through a portfolio dashboard.
Saved versions	Portfolio versions (and their projects) can only be done through the base portfolio. Portfolio dashboards can filter on saved versions if needed.
Financial management	Financials can only be viewed through the portfolio dashboard. Financials are managed through the base portfolio.
Configuration	Configuration, except for the portfolio dashboard filter, is not applicable to the dashboard portfolio. Configuration to the projects is applied based on their respective portfolio's.

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
Abert Swank Resource Allocation Readers John Edwards Resource Allocation Members Theo van Wirdum	 Add Arjan van der Laan Remove > Errik Aalbersberg Henk Visser Henk Visser Henk Visser Jan Jansen Jan Jansen Peter Cole Richard de Groot Ruud V. Weerdenburg Saupont Administrator
Tom Maassen	<-Add

Edit members for Resource Allocation

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.

sourc	ce Pool: Resource P	Pool: IT														Add / Re	move Re	sources	Edit Ti	imelin	e Setting
Horizon:	3 Months Start Date	02-Aug-2010		So	cale:	١	Week	s Un	nit:		Hou	rs (chan	jes ar	e spre	ad out ov	er period)	Mode:		Automati	ic Reca	alculation
Fill in the	e project allocation for resou	irces based on the p	roject pl	an an	d/or req	uest.															
Allocat	ted > Available Allocate	d < Available	equest o	r Planr	ned > Allo	ocated		Plann	ied > Rec	uest											
louring a	on project row indicates that or	ne of the underlying re	source/s	kill row	/s has a i	matching	g con	dition.													
quest 8	& Allocation per Project																				Ed
aale:	Planned V Request V	Allocation 👽 Rema	aining	Ava	ilable +	1															
			31 02-08	3	32	09-08		3	3 16-08		:	34 23-08		1	35 30-08		36 06-09		37 13-0	9	3
	ojects > Resources						Allo			Allo			Allo			Allo Ren		Allo Re			
e 🔶 Pro	rojects > Resources Filter by resource						Allo			Allo			a Allo			Allo Ren		Allo Re			
🔶 🔶 Pro	Filter by resource	Skill 🕀		q Allo	Ren Pl		Allo 64			Allo 64				Rem		Allo Ren 152	r Plan Rec		rr Plan Re	eq Alle	
¢ Pro	Filter by resource	Skill 🕀	Plan Re	q Alla 2 64	88	an Req		Ren F	Plan Req		Ren	Plan Re	64	Rem	Plan Req	152	r Plan Rec	15	rr Plan Re	eq Alle	o Rem F
e ♦ Pro	Filter by resource	Skill 🕀	Plan Re	q Allo 2 64 7 39	88	an Req 82	64	Ren F	Plan Req 86	64	Ren	Plan Re	64 39	88	Plan Req 138	152	158 112	15	rr Plan Re 2 14 10	eq Alle	o Rem F
¢ Pro	Filter by resource 	Skill 🔶	Plan Re 8	q Allo 2 64 7 39 0 10	88 20	an Req 82 57	64 39	Rent F	Plan Req 86 61	64 39	Ren 1	Plan Re 64 39	64 39 10	88 20	Plan Req 138 92	152	r Plan Rec 158 112 16	15	rr Plan Re 2 14 10 2 1	eq All(18 12	o Rem F 152
♦ Pro	Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg	Skill Filter by skill Project Manager IC	Plan Re 8 5	q Allo 2 64 7 39 0 10 3 15	88 20 20	82 82 57 20	64 39 10	Ren F	Plan Req 86 61 20	64 39 10	88	Plan Re 64 39	64 39 10	88 20 20	Plan Req 138 92 16	152 40 40	158 158 112 16 22	15	rr Plan Re 2 14 10 0 1 0 2	eq Alle 18 12 16	o Rem F 152 40
¢ Pro	Filter by resource	Skill Filter by skill Project Manager IC Software Developer	Plan Re 8 5 2 2 1	q Allo 2 64 7 39 0 10 3 15	20 22 22	82 82 57 20 23	64 39 10 15	Ren F 88 20 20	Plan Req 86 61 20 27	64 39 10 15	Ren 1 88 20 20	Plan Re 64 39 10 15	64 39 10 15 10	88 20 20 22	Plan Req 138 92 16 22	152 40 40 32	158 158 112 16 22 52	15 4 4 3	rr Plan Re 2 14 10 0 1 2 5	eq Alle 18 16 22	o Ren F 152 40 40
◆ Pro	Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg Vio Rings John Edwards	Skill Filter by skill Project Manager IC Software Developer Software Engineer	Plan Re 8 5 2 2 1	q Allo 2 64 7 39 0 10 3 15 0 10 4 4	20 22 26	82 57 20 23 10	64 39 10 15 10 4	Ren F 88 20 20 20 22	Plan Req 86 61 20 27 10	64 39 10 15 10	Rem 1 88 20 20 22	Plan Re 64 39 10 15 10	64 39 10 15 10 4	88 20 20 22	Plan Req 138 92 16 22 32	152 40 40 32	158 158 112 16 22 52	15 4 4 3 4	rr Plan Re 2 14 10 2 2 12 2 5 0 1	eq Alle 18 16 22 52	o Rem P 152 40 40 32
◆ Pro	Filter by resource [Resources Summary] - Apollo Project - Erik Aalbersberg - Ivo Rings - John Edwards - Peter Cole	Skill Filter by skill Project Manager IC Software Developer Software Engineer	Plan Re 8 5 2 2 1	q Allo 2 64 7 39 0 10 3 15 0 10 4 4 5 25	20 20 22 26	82 57 20 23 10 4	64 39 10 15 10 4 25	Ren F 88 20 20 20 22	Plan Req 86 61 20 27 10 4	64 39 10 15 10 4	Rem 1 88 20 20 22	Plan Re 64 39 10 15 10 4 25	64 39 10 15 10 4	88 20 20 22	Plan Req 138 92 16 22 32 22	152 40 40 32	Plan Rec 158 112 16 22 52 22	15 4 4 3 4	rr Plan Re 2 14 10 2 2 12 2 5 0 1	eq Alle 18 16 12 12 12 12 16	152 40 40 32

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 - Project Integration - Currencies - Resource Ategories - Financial Categories - Financial Categories - Financial Categories - Manage Kuis - Manage Kuis - Manage Kuis - Manage Rom-project Activity Sets - Resource Atocation - Resource Atocation - Construct Helds - Approval entities - -	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.

Name:	Consultant (Jr.)	Creator:	Erik Aalbersberg
Resource Category:			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**'.

Configuration												
Options	++ -	-	Manage Resources									
 Principal Toolbox Notifications 			Here you can manage There are two types		e resource allocation							
 MS Project integration Conversions Manage Hour Rates 				nat are <u>not</u> linked to a nat are linked to a use								
Project Plaza Currencies			Resources (no users)				Edit	New	Remove	* Resources		View Options
Resource Categories			Last Name 🔶	First Name	Primary Skill	Secondary Skill(s)	Email			Phone		Remarks
Einancial Categories			Bloemen	Pieter	Project Manager	Consultant (Sr.)	Peter	@mail.c	om	+31 53 231	4 357	
Manage Resources												
manage okiis			Resources (users)						Edit	* Resources		View Options
Manage entries			Last Name 🔶	First Name	Primary Skill	Secondary Skill(s)	Email			Phone		Remarks
Manage Non-project Activit Resource Allocation Customize fields Approval entries	ty Sets		Aalbersberg	Erik	Project Manager	Consultant (Jr.), Consultant (Sr.), Project Manager ICT	e.aalb	ersberg	@fortes.nl	06 24 94 66	66	
Approvarentities			Administrator	Support		-	suppo	rt@forte	s.nl			
			Cole	Peter	Software	-	p.cole	@fortes	.nl			
			Davies	Samuel	-	-	Davie	s@mail.	com			
			de Groot	Richard	Consultant (Jr.)	Software Developer	rdegro	oot@ma	il.com			
			Edwards	John	Software Engineer	Software Developer	j.edwa	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 user	rs)	Edit	Remove * Resource	ces 💌	View Options -
Last Name 🌲	First Name	Primary Skill	Secondary Skill(s)	Email	
Bloemen	Pieter	Project Manage	er Consultant (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 (Sr.), Project Manager CT T	e.aalbersberg@fortes.nl	06 24 94 6	6 66
Administrator	Support			support@fortes.nl][

Appointing a primary skill

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 Develope	er 🔍
Last Name:	Cole	Secondary Skill(s):		-
Initials:	Ρ.	Default Hou	Cor	sultant (Jr.)
Email:	p.cole@fortes.nl	Remarks:		sultant (Sr.) ject Manager ICT
Phone:			< Sof	tware Developer tware Engineer
		OK A	nnuleren	

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 Prope	rties Request & Allocation (Project	s) Availability (Resources)
Resource Poo	ol: Resource Pool: IT	

Dashboard tab

- 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:	Q			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.

3.3.1.1.1 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 de	scription
Name:	Resource Pool: IT
Description:	
Non-Project Activ	ity Sets
Non-Project Activity	y Sets: Niet-Project Activiteiten Non-Activités du projet Vion-Project Activities Non-Project Activitiaten

Select a non-project activity set

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>

3.3.1.2 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.

Horizo	n: 3	Start Date	02-Aug-2	2010	Scale:	Weeks	Unit:		ŀ	lours	(change	s are s	pread o	ut over	Mo	ode:		Automat		
Fill in	the availability fo	or resources	and their allocati	ion to non-	project activities (NP/	A's).														
Allo	cated > Available	Allocat	ed < Available																	
Availab	ility & NPA Allo	cation per F	lesource															Sa	Ve	Cance
	-																	ou	••	ounoc
Toggla		Domaining	Available -	4	1															
Toggle:	Allocation	Remaining	V Available	+ - 4	2		05 20 4	0.0		0.00		12.00		20.00		0.07.00		04.40		
						Δ	35 30-I		36 O			13-09		20-09		9 27-09		0 04-10		
Re	esources > NPA				ary Skill(s)	Ð										9 27-09 Allo Rem				
Re	esources > NPA Filter by NPA		Primary Skill	😔 Second		, in the second s	Allo R	Ren A					Avai A		Avai A		Ava A		Avai	Allo R
Re V	esources > NPA Filter by NPA		Primary Skill	⇔ Second r IC Consul	dary Skill(s)	, in the second s	Allo F	Ren A	vai Allo	Rem	Avai Alle	Rem	Avai A	llo Rem 40	Avai A	Allo Rem	Ava A	llo Rem	Avai	Allo R
Re V	esources > NPA Filter by NPA Erik Aalbersb Ivo Rings	¢	Primary Skill Project Manage	⇒ Second r IC Consul ope	dary Skill(s) Itant (Jr.), Consultant	, in the second s	Allo F	Ren A	vai Allo	Rem 40	Avai Alle	Rem 40	Avai A	llo Rem 40	Avai A	Allo Rem	Ava A	llo Rem	Avai	Allo R
Re ×+ ± ×+ ±	esources > NPA Filter by NPA Erik Aalbersb Ivo Rings	¢	Primary Skill Project Manage Software Develo	⇒ Second r IC Consul ope eer Softwar	dary Skill(s) Itant (Jr.), Consultant	, in the second s	Allo F	Ren A	vai Allo	Rem 40	Avai Alle	Rem 40	Avai A	llo Rem 40	Avai A	Allo Rem	Ava A	llo Rem	Avai	Allo R
	esources > NPA Filter by NPA Erik Aalbersb Ivo Rings John Edwards	¢	Primary Skill Project Manage Software Develo Software Engine	⇒ Second r IC Consul ope eer Softwar	dary Skill(s) Itant (Jr.), Consultant	, in the second s	Allo F	40 40	vai Allo	Rem 40	Avai Alle	Rem 40	Avai A	llo Rem 40	Avai A	Allo Rem	Ava A	llo Rem	Avai 40	41 11-1 Allo Ri

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

	ard Properties	Request & /	Allocation (Projects) Availability (Resources)																
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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.

3.3.1.3 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

- **Red:** alarm the resource manager to the fact that resources have been allocated over and above their availability

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

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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

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X 🗠 🕓	-			Erik Aalbersberg	Project Manager IC
ו 🖻	1.	• •	Ė⊷ Vei	nus Project	
84				Peter Cole	Software Develope

Opening a discussion log

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

scussion between Resource	Pool 1 and Venus Project		
Here you can read and contri completed or flag the request	bute to the discussion between the project m for follow-up.	anager and pool manager. You can add a messa	age, mark the request as
Discussion Status:	New	Request Status:	Yellow
scussion Log			Red
			Yellow
			Blue Green
			(If Green
			-
K Cancel			

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.

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	Erik Aalbersberg (11-Nov-2011 14:29): James is not available next week	46 16
26 Y	James is not available next week	10
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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 Resource Management tab.
- 2. Click on Edit Resource Pools. A pop-up will appear where you can link a resource pool to a

project.

Pool References		
Resource Pool(s):	Q Available Resource Pool(s)	Q Selected Resource Pool(s)
		ICT Pool
		→
		←

Add a resource pool to the project

- 3. By using the "->" the project manager is able to add more resource pools. Dragging pools is also possible.
- 4. Click **Ok** to save your changes

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

 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.

- 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.

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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:
 - 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

Note: The new <u>generic project planning</u> 74th provides a different approach, please refer to the help <u>there</u> 80th.

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'

eneral	Logs	Dependencies	Costs & Hours	Resource Deman	d					
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Hours	Planne	d:	0.00		Final: 1	7-Jan-20)13			
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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 Entry (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 time sheet which they can then use to register the hours worked against projects and non-project activities, like leave. Using these time sheets, actual cost entries can be allocated against projects and non-project activities according to pre-defined hourly rates.

3.4.1 Generating, submitting and approving time sheets

The process contains the following steps, which are explained in the next sections.

1. Creating a time entry configuration 12

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 168

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 126

These groups define departments / teams. Members of a group share configuration, non-project activity sets and the approvers of the weekly time sheets.

Time Entry	A time regist	ration group contains a group	of persons for time e	ntry.					Membe	rs Cu	ustomis	e Page Text	A			
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		Start Date: End Date: Correction Time Sheet: Fill in the hours for this of individual rows may nee	18-Feb-2013 24-Feb-2013 - week on the appropria	manager(s). T	'his is ind Mon	licated	by icon: Wed	ighted ros at the Thu	ows (in start of	yellow) a the row.		selected for Totals	time entry by % Complete F		of the time sheet. Not Remarks by . (k)	v e that
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		Start Date: End Date: Correction Time Sheet: Fill in the hours for this individual rows may nee Project General Venus Project (Albert S	18-Feb-2013 24-Feb-2013 - week on the appropria d approval by project Product / Activity	manager(s). T Hours Actual	'his is ind Mon	ficated	Wed 20	ighted ros at the Thu	ows (in start of	yellow) a the row.	are pre-	Totals	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Individual rows may nee Project General Venus Project (Albert S () (Albert S Project (Erk)	18-Feb-2013 24-Feb-2013 	manager(s). T Hours Actual	Mon 18	ficated Fue 19	Wed 20	ighted n s at the Thu 21	ows (in start of	yellow) a the row.	are pre-	Totals 16.00 4.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: individual rows may nee Project General Venus Project (Zink Apalo Project (Zink Apalo Project (Zink	18-Feb-2013 24-Feb-2013 - week on the appropria d approval by project Product / Activity	manager(s). T Hours Actual	Mon 18	ficated	Wed 20	ighted n s at the Thu 21	ows (in start of Pri 22	yellow) a the row.	are pre-	Totals 16.00 4.00 2.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: individual rows may nee Project General Venus Project (Bin Apalio Project (Bin) Omage Project (Ein	18-Feb-2013 24-Feb-2013 - week on the approprint d approval by project Product / Activity Project initiation Docc	manager(s). T Hours Actual	Mon 18	ficated Fue 19	Wed 20	ighted n s at the Thu 21	ows (in start of	yellow) a the row.	are pre-	Totals 16.00 4.00 2.00 6.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 - week on the approprint d approval by project Product / Activity Project initiation Docc	manager(s). T Hours Actual	Mon 18	ficated Fue 19	Wed 20	ighted n s at the Thu 21	ows (in start of Pri 22	yellow) a the row.	are pre-	Totals 16.00 4.00 2.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: individual rows may nee Project General Venus Project (Bin Apalio Project (Bin) Omage Project (Ein	18-Feb-2013 24-Feb-2013 - week on the approprint d approval by project Product / Activity Project initiation Docc	manager(s). T Hours Actual	Mon 18	ficated Fue 19	Wed 20 4.00 4.00	ighted n s at the Thu 21	ows (in start of Pri 22	sat 23	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 - week on the approprint d approval by project Product / Activity Project initiation Docc	manager(s). T Hours Actual	Mon 18	ficated Fue 19	Wed 20 4.00	ighted n s at the Thu 21	Fri 22 6.00	sellow) a the row.	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 - week on the approprint d approval by project Product / Activity Project initiation Docc	manager(s). T Hours Actual	Mon 18	ficated	Wed 20 4.00 4.00	ighted ros at the Thu 21	Fri 22 6.00	sat 23	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 	manager(s). T Hours Actual	Mon 18 8.00 8.00	ficated	Wed 20 4.00 4.00 8.00	ighted ros at the Thu 21	6.00	vellow) + the row.	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00 32.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 	mainaiger(s). T Hours Actual 0.00 0.00	Mon 18 8.00 8.00	2.00	Wed 20 4.00 4.00 8.00	ighted ro s at the Thu 21 8.00	6.00	vellow) + the row. Sat 23	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00 32.00	% Complete F			v e that
		Start Date: End Date: Correction Time Sheet: Grief in the hours for this individual rows may nee Project General Venus Project (Albert Apalio Project (Erk Apalio Project (Erk Venus Project (Albert	18-Feb-2013 24-Feb-2013 	mainaiger(s). T Hours Actual 0.00 0.00	Mon 18 8.00 8.00	2.00	Wed 20 4.00 4.00 8.00	ighted ro s at the Thu 21 8.00	6.00	vellow) + the row. Sat 23	Sun 24	Totals 16.00 4.00 2.00 6.00 4.00 32.00	% Complete F			v e that

Add-on 'Time sheets'

See also <u>Registration of actual hours</u> ⁵³ for more information about using Time sheets.

3.4.1.1 Creating a time entry configuration

The time entry configuration defines a number of options for the way time sheets are provided/ managed.

The main configuration concerns the available products or plan items that are shown/selectable on the time sheet.

Two methods exist depending on the setting at Settings > Configuration > Time Entry > Settings > Support for Activity Planning.

If set to ' No', the configuration provides following options:

- which products are shown/selectable on time sheets:
 - "membership" based: only products of which the user is owner, reviewer or participant are shown 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.

If set to 'Yes', the configuration provides following options:

- which filters should be used for pre-selected items
- which filters should be used for selectable items

Creating a time entry configuration (Support for Activity Planning = No)

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**.

Time Entry		• A time registration group con	Itains a group of persons for time en	ta			Edit Members	Customis	e Page Text
Automated Reports	Edit	A time entry group can be re	lated to a single configuration and o nd created in 'Setup->Configuration'.	ne or more non	-project	activity sets	(NPA sets).		
Pending Timesheets									
Approved Timesheets		Time Entry Groups			New	Remove	* All Time Entry G	roups 💌	View Options
		Name 🌲	Description	Group Mana	ager	Time Ent	ry Configuration	Non-Project	Activity Sets
		ICT	Groep voor ICT medewerkers	Erik Aalbers	berg	Budget		Non-Project	Activities
Reports		Sales	Groep voor Sales medewerkers	Albert Swan	k	Members	hip	Non-Project	Activities
Time Entry Groups Non-Project Activity Sets Activities		•		III					
Time Sheets Cost / Hour Entries		Time Entry Configurations			New	Remove	* All Time Entry C	onfigurati 👻	View Options
Cost / Hour Entrics		Name 🚖	Description						
Timeline Reports		Budget	Products appear on time sheets an hours budget has been set o products						
Entries		Membership	Products appear on time sheets users are owner/reviewer/partic those products. Active stage on choice of products also allowed	ipant of ly. Free					

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: @Products from active stage on @Products from all stages	ity		
Product Budget: Products from active stage or Products from all stages	iy		
Free product selection			
Allow free entry on projects:			
Allow free entry on non project activities:			
Show fields on time sheet			
Product Field (read-only):	V		
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 product / plan item filters (Support for Activity Planning = Yes) 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'.

Options ++ -	- Settings			
Principal Toolbox	Module name: Time Entry			
Notifications				
MS Project integration	Settings for Time Entry			
Conversions	Settings			
Manage Hour Rates	Settings			
Project Plaza				
Currencies		Default value	Custom value	
Resource Categories	Allow project manager(s) to approve	🔘 No	Yes	
Financial Categories	hours 🚯	0.11		
Manage Resources	Allow project manager(s) to configure hour rates per resource	No	Yes	
Manage Skills	Support for Activity Planning	No	• Yes	
Time Entry	Support for Activity Flamming	0110	Ves 💌	
Settings				
Exclusions for Pivi-approval	OK Cancel			
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.

Dashboard Accountable Hours Pl	lanning Item Filters		
Time Entry Configuration	: Budget		Edit Close
Edit time entry configuration Set name and settings for this cor General	nfiguration. A planning item c	n be a product, an activity or a non project activity.	
General			
Name:		Budget	
Description:		Products appear on time sheets when an hours budget h products	as been set on those
Split Up Time Sheets on Month Tra			
Create new Time Sheets after Appro Allow external users as time entry (
		fault. For these items, employees can directly start wr re which Planning Items should be shown as pre-sele	
Pre-selected Planning Item Filters:	Selected Filter(s)	Available Filter(s)	
	No name	 Pre-selected With budget With budget and in progress With ownership With ownership and in progress 	
be selected to configure which pla	anning items should be select		e items. Filters can
Selectable Planning Items:	Selected Filter(s) No name	Available Filter(s) Pre-selected	
		With budget With budget and in progress With ownership With ownership and in progress	
Show fields on time sheet			
Product Field (read-only):	Percentage Complete		
Entry Field (selectable in time shee	t):	Required to be set	
Approval			
Auto Approve on Submit:			
Create draft entries on request app	roval:	Replace draft entries after approval.	
		Keep history of draft entries after approval.	

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 time sheet. 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 Time sheets' 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 time sheet.
Selectable Planning Items :	Select which products can be selected on the time sheet 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 time sheet (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 time sheet.
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> 127. 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.

Time Entry Configuration: Bu	dget					Clos
A planning item filter defines which Example: A filter can be created that in top-level actvities only.	products/activities etc. will be displayed cludes only top-level activities. When the		n (dashboard i	ab) members a	re allowed	to write hours o
Preview of products/activities that will	be shown on the time sheet		* Witi	n ownership	-	View Options
Name 🚖	Project	All Members	Start	Draft	Ch d	Set Filter
Project Initiation Document (PID)	Venus Project	John Edwards, Albert Swank, Erik Aalbersberg	16-Jun-2012	19-Jun-2019	21-Jun-201	Set Columns Set Widths Advanced Make Default Save View
						Manage Views

Creating a Planning Item Filter

Functionalities

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- 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.

Time Entry						Edit Members	Customi	se Page Text
Automated Reports	A time entry group can be r	ontains a group of persons for time el elated to a single configuration and d and created in 'Setup->Configuration	one or more nor	I-project	activity sets	(NPA sets).		
Approved Timesheets	Time Entry Groups			New	Remove	* All Time Entry G	Broups -	View Options
	Name 🔶	Description	Group Man	ager	Time Ent	ry Configuration	Non-Project	Activity Sets
	ICT	Groep voor ICT medewerkers	Erik Aalbers	sberg	Budget		Non-Project	Activities
Reports	Sales	Groep voor Sales medewerkers	Albert Swar	nk	Members	ship	Non-Project	Activities
Time Entry Groups Non-Project Activity Sets Activities			ш					•
Time Sheets Cost / Hour Entries	Time Entry Configurations			New	Remove	* All Time Entry C	onfigurati 👻	View Options
	Name 🔶	Description						
Timeline Reports	Budget	Products appear on time shee an hours budget has been set products						
Entries	Membership	Products appear on time shee users are owner/reviewer/parti those products. Active stage o choice of products also allowe	cipant of nly. Free					

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.

Add Time Entry Group			
dit name and description			
Name:			
Description:			
Select area members			
Group Manager		Available users	
	<- Add Remove ->	Q Albert Swank Arjan van der Laan Erik Aalbersberg Herk Visser Herman Mulder Ivo Rings	
Group Support	<- Add Remove ->	Jan Jansen Jeroen van Barneveld John Edwards Peter Cole Richard de Groot Ruud Peltzer Ruud v. Weerdenburg Samuel Davies	
Group Reader	<- Add Remove ->	Support Administrator Theo van Wirdum Tom Maassen Yung Ji-Lao	
ime sheet configuration			
ime Entry Configuration:	Budget 💌		
Minimum Hours per Time Sheet:			
Non-project activities			
Non-Project Activity Sets:	Niet-Project Activiteiten Non-Activités du projet Non-Project Activities Non-Projekt-Aktivitäten		
OK Cancel			

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

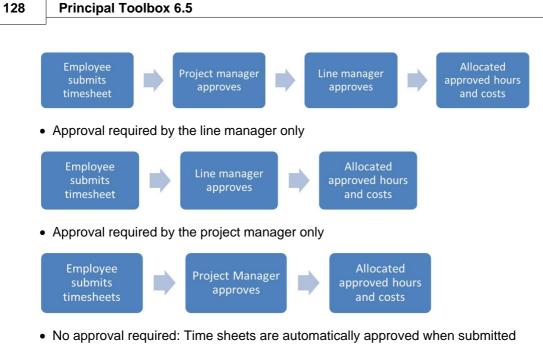
Time Sheets Members	& Approvers Hour Entries			
Time Entry Group	: ICT			
Name:	ICT		Time Entry Configuration: Membership	
Description:	Groep voor ICT medewerk	ers	Non-Project Activity Sets: Non-Project Activities	
Group Approvers				Add / Remove
Name	Email	Remarks		
Ruud v. Weerdenburg	r.vanweerdenburg@fortes.nl			
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 Time sheets 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'**.

Dash	board	Properties -	Product Breakdown	Plan	Gantt	Resource Ma	anageme	ent 👻	Docur	ments 👻	Reports	Guide	Plaza				
Pro	ject:	Juno Proje	ect														
8 S	elect ap	plicable lines t	elow to approve or rej	ect the h	nours.												
App	prove h	ours												Approve	Reject	* Waiting for approval	▼ View Options ▼
Wee	k Res ber	ource 🌲	Product/Activity 🌲			Start Date 🚖	Mon	Tue	Wed	Thu	Fri S	at Su	n Tri	cemarks by Own	er	Remarks by Ap	prover(s)
	45 Erik	Aalbersberg	Highlight Report			07-Nov-2011		4.00)	4.00	D		8.	00			
	2 Erik	Aalbersberg	Product A			07-Jan-2013		4.00	4.0	0 5.00	0	-	13.	00			

Approval by line manager only

In case a line manager needs to be able to approve Time sheets, 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 Time sheets 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 Time sheets. 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'
- 3. 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 Time sheets, 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 time sheets

Any Time sheets that need filling out will appear on the personal dashboard of the employee on the tab 'My Time Sheets'.

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
	8 18-Feb-2013	Erik Aalbersberg	New		ICT

My open Time sheets on the homepage

Any open Time sheets will be displayed as a listing. Click on the start date of the time sheet to open it. The following window will open:

wner:	Erik Aalbersberg					Time	Entry G	roup:		ICT				
ime Sheet Status:	New New						Sheet A		er(s):	Erik Aalber	shero			
ast Saved By:	Li New						rks by			Entry Global	oborg			
otal Hours:	0.00					Grou	o Mana	er:						
linimum Hours:	0.00					Rema	rks by	Owner:						
tart Date:	04-Feb-2013													
nd Date:	10-Feb-2013													
orrection Time Sheet:														
orrection Lime Sheet:	1													
Individual rows may need	Draduat / Astivity	Percentage	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Totals	Remark	9	Remarks by Apr	orover(
Project eneral	Draduat / Astivity				Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Totals	Remark	s	Remarks by App	prover(s
Project eneral	Draduat / Astivity	Percentage Complete	Mon	Tue						Totals 0.		s	Remarks by App	prover(s
Project eneral	Product / Activity	Percentage Complete	Mon	Tue							00	ş	Remarks by App	prover(s
Project eneral Venus Project (Albert Swa	Product / Activity	Percentage Complete	Mon	Tue						0.	00	S	Remarks by App	prover(s
Project eneral Venus Project (Albert Swa Apollo Project (Peter •	Product / Activity Project Initiation Docume	Percentage Complete 25%	Mon	Tue						0,1	00	S	Remarks by App	prover(s
Project eneral Venus Project (Albert Swa Apollo Project (Peter + Zeus Project (Erik Aa+	Product / Activity Project Initiation Docume (On Project)	Percentage Complete 25%	Mon	Tue						0.0	00	\$	Remarks by App	prover(s
Project eneral Venus Project (Albert Swa Apollo Project (Peter • Zeus Project (Erik Aa • Venus Project (Albert •	Product / Activity Project Initiation Docume (On Project)	Percentage Complete 25%	Mon	Tue						0.1 0.1 0.1	00 00 00 00	\$	Remarks by App	prover(s
Project eneral Venus Project (Albert Swa Apollo Project (Peter + Zeus Project (Erik Aa+ Venus Project (Albert + Apollo Project (Peter +	Project Initiation Docume (On Project) Project Initiation Do •	Percentage Complete 25%	Mon	Tue						0.1 0.1 0.1 0.1	00 00 00 00	\$	Remarks by App	prover(s
Project eneral Venus Project (Albert Swi Apollo Project (Peter * Zeus Project (Albert * Apollo Project (Albert * Non-Project Activities *	Project Initiation Docume (On Project) Project Initiation Do •	Percentage Complete 25%	Mon	Tue 5		7	8	9		0.1 0.1 0.1 0.1 0.1	00	S	Remarks by App	prover(s
Project eneral Venus Project (Albert Swi Apollo Project (Peter * Zeus Project (Albert * Apollo Project (Albert * Non-Project Activities *	Project Initiation Docume (On Project) Project Initiation Do •	Percentage Complete 25%	Mon 4	Tue 5		7	8	9		0.1 0.1 0.1 0.1 0.1	00	S	Remarks by App	prover(s
Project eneral Venus Project (Albert Swi Apollo Project (Peter * Zeus Project (Albert * Apollo Project (Albert * Non-Project Activities *	Project Initiation Docume (On Project) Project Initiation Do •	Percentage Complete 25%	Mon 4	Tue 5		7	8	9		0.1 0.1 0.1 0.1 0.1	00	\$	Remarks by App	prover(
Project eneral Venus Project (Albert Swi Apollo Project (Peter * Zeus Project (Albert * Apollo Project (Albert * Non-Project Activities *	Project Initiation Docume (On Project) Project Initiation Do •	Percentage Complete 25%	Mon 4	Tue 5		7	8	9		0.1 0.1 0.1 0.1 0.1	00	8	Remarks by App	prover(s

A time sheet

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 Time sheets'</u> for instructions on how to approve the submitted Time sheets.

3.4.1.5 Approving time sheets

Approval by project manager

When a time sheet 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.

pprove hours									Approve	Reject	- Cus	tom view	•	View Options
/eek umber Project _♀ ≩	Resource	Product/Activity	Start Date	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Re	emarks by Owner		Rem
45 Juno Project	Erik Aalbersberg	Highlight Report	07-Nov-2011		4.00		4.00)			8.00			
45 Juno Project	Erik Aalbersberg	Product A	07-Nov-2011			4.00)	4	.00		8.00			
3 Juno Project	Erik Aalbersberg		14-Jan-2013	2.0	D						2.00			
2 Juno 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			

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 Time sheets will appear on the line manager's personal dashboard.

Home	Approve Hours	My Time Sheets								
Home							Customise Page	Text Customise Home Pag	ge Edit Widgets	Q
	Prine Dolb	cipal ox	Hei		information regarding pr	ojects, products and other b sks, actions and timesheets				
My op	en time sheets					Documents to be ap	proved by me			
Week	Start Date 🌲	Owner	Time Sheet Status	Remarks by Owner	Time Entry Group	Document	Location		Due Date 🌧	
	6 04-Feb-2013	Erik Aalbersberg			ICT	Hoofdpuntenrapport.rtf	Highlight Reports		04-May-2010	
	7 11-Feb-2013	Erik Aalbersberg	New		ICT	Highlight_Report.rtf	Highlight Report	Apolio Project	24-Aug-2010	
	7 11-Peb-2013									
	8 18-Feb-2013	Erik Aalbersberg	New		ICT					_
			New		ICT	Time sheets to be ap	pproved by me			_

To be approved Time sheets on the homepage

By clicking on the start date of one of the Time sheets it opens and the line manager, after reviewing the contents, can choose to **Approve** or **Reject** the request for approval.

me sneet 21-Jan-	2013 - 27-Jan-20	13 (Erik Aal	bersb	erg)						Close	Approve	Reject	Approval Statu	5 🛛	
wner:	Erik Aalbersberg					Time	Entry G	iroup:		ICT					
ime Sheet Status:	🕒 Waiting for Times	eet Approval				Time	Sheet A	Approv	er(s):	Erik Aalb	ersberg				
ast Saved By:	Erik Aalbersberg	ICCI Approval				Rem	arks by	Approv	er /						
otal Hours:	30.00						p Mana arks by								
inimum Hours:	0.00					Rem	arks by	Owner:							
tart Date:	21-Jan-2013														
nd Date:	27-Jan-2013														
Correction Time Sheet:															
		nager(s). This is	indicate	ed by ic	ons at ti										
		Percentage	Mon	tue	ons at th	Thu	Fri	Sat	Sun 27	Totals	Remark	5	Remarks b	/ Appro	
individual rows may nee	d approval by project ma	nager(s). This is	indicate	ed by ic	ons at ti					Totals	Remark	s	Remarks b	/ Appro	
Project eneral	d approval by project ma	Percentage Complete	Mon	Tue 22	ons at th	Thu	Fri	Sat			Remark	5	Remarks by	/ Appro	
Project eneral Apollo Project (Peter Co	d approval by project ma	Percentage Complete	Mon 21	Tue 22	Wed 23	Thu	Fri	Sat				5	Remarks b	/ Appro	
Project eneral Apolio Project (Peter Co Apolio Project (Peter Co	d approval by project ma Product / Activity ble Intake-gesprek met ein	Percentage Complete	Mon 21	Tue 22	Wed 23	Thu	Fri	Sat		1	B.00	5	Remarks by	/ Appro	
Project eneral Apolio Project (Peter Co Apolio Project (Peter Co	d approval by project ma Product / Activity ble Intake-gesprek met ein ble Project Initiatie Docum ble Uitrol naar Client PCs	Percentage Complete	Mon 21	Tue 22 4.0	Wed 23	Thu 24	Fri	Sat		1	B.00 4.00	S	Remarks by	/ Appro	
Apolio Project (Peter Co Apolio Project (Peter Co Apolio Project (Peter Co Apolio Project (Peter Co Venus Project (Albert So Venus Project (Albert So	d approval by project ma Product / Activity le Intake-gesprek met ein be Project Initiatie Docum le Uitrol naar Glient PCs wir Initial Project Plan wir Project Authorisation	Percentage Complete dç 50% en 75% 0% 0%	Mon 21	Tue 22 4.0 2.0	Wed 23 0 0 6.0 2.0	Thu 24	Fri 25	Sat			8.00 4.00 2.00 6.00 5.00	s	Remarks by	/ Appro	
Project eneral Apollo Project (Peter Cc Apollo Project (Peter Cc Apollo Project (Peter Cc Venus Project (Albert St Venus Project (Albert St	d approval by project ma Product / Activity ble Intake-gesprek met ein ble Project Initiatie Docum le Utirol nac Client PCs wz Initial Project Plan	Percentage Complete dç 50% en 75% 0% 0%	Mon 21 8.01	Tue 22 4.0 2.0	Wed 23 0 0 0 0 0 0 2.0 0 0	Thu 24 0 0 4.0	Fri 25 0	Sat 26	27		8.00 4.00 2.00 5.00 5.00 4.00	5	Remarks b	/ Appro	
Project eneral Apollo Project (Peter Cc Apollo Project (Peter Cc Apollo Project (Peter Cc Venus Project (Albert St Venus Project (Albert St	d approval by project ma Product / Activity le Intake-gesprek met ein be Project Initiatie Docum le Uitrol naar Glient PCs wir Initial Project Plan wir Project Authorisation	Percentage Complete dç 50% en 75% 0% 0%	Mon 21	Tue 22 4.0 2.0	Wed 23 0 0 0 0 0 0 2.0 0 0	Thu 24 0 0 4.0	Fri 25 0	Sat 26	27		8.00 4.00 2.00 6.00 5.00	S	Remarks b	/ Appro	
Project eneral Apollo Project (Peter Cc Apollo Project (Peter Cc Apollo Project (Peter Cc Venus Project (Albert St Venus Project (Albert St	d approval by project ma Product / Activity le Intake-gesprek met ein be Project Initiatie Docum le Uitrol naar Glient PCs wir Initial Project Plan wir Project Authorisation	Percentage Complete dç 50% en 75% 0% 0%	Mon 21 8.01	Tue 22 4.0 2.0	Wed 23 0 0 0 0 0 0 2.0 0 0	Thu 24 0 0 4.0	Fri 25 0	Sat 26	27		8.00 4.00 2.00 5.00 5.00 4.00	S	Remarks b	/ Appro	
Project Project Apollo Project (Peter Cc Apollo Project (Peter Cc Apollo Project (Peter Cc Apollo Project (Albert Sc Venus Project (Albert Sc	d approval by project ma Product / Activity le Intake-gesprek met ein be Project Initiatie Docum le Uitrol naar Glient PCs wir Initial Project Plan wir Project Authorisation	Percentage Complete dç 50% en 75% 0% 0%	Mon 21 8.00	Tue 22 4.0 2.0 4.0 2.0 4.0 0 10.0	Wed 23 0 0 0 0 0 0 0 0 0 0 0 0 0 0 8.0	Thu 24 0 0 4.0	Fri 25 0	Sat 26	27	1 1 1 10 31	8.00 4.00 2.00 5.00 5.00 4.00	5	Remarks b	/ Appro	

Approving a time sheet

3.4.2 Time and cost allocations

Against products, part of a project, cost and hour entries can automatically be generated from the Time sheets that have been submitted. The tab 'Costs & Hours' on each product will then list all the costs and hours in line with the Time sheets 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 131
- 2. Let project managers set hourly rates [132]
- 3. Get cost and hour entries against individual products [134]

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 Ms Project Integration Conversions Manage Hour Rates Currencies Resource Categories Manage Resources Manage Resources Manage Resources Manage Non-project Activity Resource Allocation G Customics fields Approval entries	Hou Nam Rate Rate Rate Rate Rate Rate Rate Rate	ur rates	all available hour rates Unique ID Principal Toolbox® (Principal) - V Principal Toolbox® (Principal) - V Tour rate (new) Gonfigure the hour rate and the global cur example, modifying an hour rate Edit name and description Name: Description: Code: Financial Category: Hour rate: 0.00 OK Cancel	line/Folder/functions/AddEditFold	der.jsp?PageID=1098298	New Remove
		l	UK Cancel			

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.

Options	++ -	-	Manage Resource	\$								
 Principal Toolbox Notifications MS Project integration Conversions Manage Hour Rates 			• Resource	anage the resources for the rpes of resources: es that are <u>not</u> linked to es that are linked to a us	a user account. Thes							
Currencies Resource Categories			Resources (no us	ers)			Edit	New	Remove	* Resources		View Options
Financial Categories			Last Name 🌲	First Name	Primary Skill	Secondary Skill(s)	Email			Phone	R	emarks
Manage Resources			Bloemen	Pieter	Project Manager IC	T Consultant (Sr.)	Peter@r	nail.com		+31 53 2314	357	
Resource Allocation	vity Sets				der.jsp?PageID=130380		LO CLUIIS	_	dit	* Resources Phone	▼ R	View Options emarks
		_	ter Cole		achippin againe 1999 an	Edit	Close		dit			
 Customize fields 		Pe		Peter	Primary Skill:	Edit						
 Customize fields 		Pe	ter Cole			Edit	Close					
 Customize fields 		Pe Fi	eter Cole	Peter	Primary Skill:	Edit Soft kill(s):	Close					
 Customize fields 		Pe Fi Li	rter Cole	Peter Cole	Primary Skill: Secondary Si	Edit Soft kill(s):	Close ware Devel					
Customize fields		Pe Fi Li E	rter Cole Irst Name: ast Name: itials: mail:	Peter Cole P.	Primary Skill: Secondary Si Default Hour	Edit Soft kill(s):	Close ware Devel					
 Customize fields 		Pe Fi Li E	eter Cole Irst Name: ast Name: itials:	Peter Cole P.	Primary Skill: Secondary SI Default Hour Remarks:	Edit Soft kill(s):	Close ware Devel a 120.0	loper				

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 ++	Settings			Edit					
Principal Toolbox	Module name: Time Entry								
Notifications MS Project integration	Settings for Time Entry								
Conversions	Customize the following settings by clicking on the edit button.								
Manage Hour Rates Currencies	To save any changes, click 'OK' or click 'C	cancel' to return to the curre	nt settings.						
Resource Categories	Settings								
Financial Categories									
Manage Resources Manage Skills		Value							
Time Entry	Allow project manager(s) to approve hours	Yes	(Custom)						
Settings Exclusions for PM-approval	Allow project manager(s) to configure hour rates per resource	No							
Manage time sheets	Support for Activity Planning	No							
Manage entries									
Manage Non-project Activity Sets Resource Allocation									
Customize fields									
Approval entries									

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):	Q 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):	N
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	at are m	ember of this project. If no	p pr	oject specific hou	ir rate is se	et, the de	fault hou	our rate is used for the time entry process.	
Desile at D												
Project Re	sources										Save Cance	91
Name (Res	ource) 🔶				1	Proj	ect Specific Hour I	Rate	D	efault Ho	pur Rate (Resource)	
Arjan van d	er Laan				-				▼ R	ate -1.0		
Ivo Rings										e -1.0		
Samuel Day	vies						e 0.0 e -1.0			e -1.0		
						Rat	e 100.0					2
							e 110.0 e 114.0		1			
							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 time sheet 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.

eneral Logs	Dependencies	Costs & Hours	Resource Demar	nd							
Product: Hig	ghlight Rep	orts							Edit	Close	
Hours	Manual	Entries	Total		Costs	N	Manual	Entries	Т	otal	
Budget:	0.00	0.00	0.00		Budge	:	0.00	0.00	0.0	00	
Committed:	0.00	0.00	0.00		Comm	tted:	0.00	0.00	0.0	00	
Actual:	0.00	0.00	0.00		Actual		0.00	0.00	0.0	00	
Remaining:	0.00	0.00	0.00		Remai	ning:	0.00	0.00	0.0	00	
Variance:			0.00		Varian	:e:			0.0	00	
Product Quality	y:										
inance											
Total Actuals:		0.00									
Cost / Hour Ent	ries listing					New Cost / Hour I	Entry	* All entries	•	/iew Optior	ıs י
Description	Туре		proval Status	Hours	Owner	Creato		Book Date 🔶 Rei	er andre ber	0	

Cost & hours tab on products

4 Reporting

Reports can be used in projects to provide reports about your projects, programme, portfolio's, time entry groups etc.

- <u>General reporting</u> [134] is provided throughout the application and is based on the ability to create views on all kinds of data.
- When working with hours and costs, it is also possible to create <u>timeline reports</u> as that provide options to report data in respect to the bookdate of the hours and costs.
- Based on these reports (general and/or timeline), <u>automated reports</u> [142] can be created that combine information from different views into a single report or apply specific formatting.
- Finally, the Principal Toolbox allows for reporting using <u>widgets</u>, dynamic functionality provided on dashboards that show the data in a specific way.

4.1 Reports

Throughout the Principal Toolbox, reporting is provided on the data that is available at various locations.

Note: Timeline reports provide a special way of reporting over costs and hours, see <u>timeline</u> reports 138.

Reports							Close
Projects						All Projects	View -
Name 🌲	Objective	Current Stage	Progress	Status	Status Description	Project Manager	Set Filter
Server relocation	Project model for small and midsize projects			٠		Cole, Peter	Set Columns Set Widths Chart Option
Theta Project	Project that runs externally	-				Cole, Peter	Advanced Make Defaul Save View

Basic project report

Reports provide different views that each set specific filtering, column (or field) selection and other options to tune the data that is shown.

Op R tio	Remarks				
	he set filt	ter options a	llows to sele	ect fields available for the c	object that is being reported.
filt	Filter				×
er				Switch to Advanced Filter	
	Archived	× VI	▼	×	
	Saved	× ▼No	v	×	
	-	•		×	
-	Hours Comn	ect Plaza Stage Only I Cumulative et et et Cumulative nitted Cumulative pe (%) pe (%bs) %) Abs)	Q 	OK Cancel	

SetColumns can be selected and ordered to build the views content. Next to selecting columns for the view, the col sorting and the number of results shown per page can be set.

•	Ascending (az)	
	Q Fields in list	
	Name (Standard fields)	\$
	Project Manager(s) (Organisation)	\$
	Current Stage (Planning)	\$
→	Status (Standard fields)	\$
	Planning Status (Planning)	\$
-	Hours Status (Hours)	\$
	Costs Status (Costs)	\$
	Objective (Standard fields)	\$
		 Q Fields in list Name (Standard fields) Project Manager(s) (Organisation) Current Stage (Planning) → Status (Standard fields) Planning Status (Planning) Hours Status (Hours)

SetWidth of the columns in the view can be controlled by dragging the column separator to the desired position. wid

ths Column Widths

-	for the selected colun nd landscape referen		to the reports	generated	through the	automated	reports.	
OK Cancel								
		A4 Portrait						
			A4 Landsca	pe				
Name	Project Manage	Current Stage	Status	Planni	Hours	Costs	Objective	

Ch The chart options allow to show the results of the view in a chart (like bar, line or pie chart) instead of a plain t

General Chart Configura	tion		
Enable chart:	Show this repor	t as a chart (not as a listing)	
Chart title:	Project per project		
Show legend:			
Label orientation:	Horizontal 💌		
Colour order:			
Size:	Medium (640 x 480)	
Chart Type			
Standard chart:	C (This chart prov	ides a chart which plots the data in	respect to the selected object type.)
	- (Field:	Representation:
	Range:	Project Manager(s)	•
	Series 1:	-	▼ Bar ▼
	Series 2:		▼ Area ▼
	Series 3:		▼ Area ▼
	Series 4:		▼ Area ▼
	Series 5:		▼ Area ▼
Stacked chart:	Chie chart prov	idee a chart which plote the data in	respect to the selected object type.)
	 (This chart prov 	Field:	Representation:
	Range:		
	Series:		▼ Area ▼
	Stacked by:		
Pie chart:	-	idee a nie chart representing the dis	tribution of the data in respect to the number of
	 (This chart prov 	ides a ple chart representing the dis	and an of the data in respect to the number of

Ad Finally, some special options can be set like hiding a header caption, provide a total etc. va

nc

ed

Advanced Settings Set options for the listing: - show category names for columns with categories (when two or more adjacent columns are of the same category); - whether to provide a total on specific columns with numeric values; - whether to hide the header name for specific columns.
Categories
Show categories for grouped category columns:
Show totals for selected columns
Hide column name for selected columns Name Project Manager(s) Current Stage Status Planning Status Hours Status Objective

Once views are configured, the views can be saved for re-use later or for the creation of automated reports.

Sa Saves the current configuration of the view. The view can be saved as a new view or overwrite an existing on

	ew. Provide a new name or save the view as an existing view. Indicate whether the view should be defined sed by you), local (to be used by everyone on this location) or global (to be used by everyone everywhere).
Select existing view to	overwrite or save as new view.
Existing View:	new view
View name:	
Type:	Personal

Views can be set to one of the following types:

Personal The view is available to the current user only but can be used throughout the application (for t same type of object). This option is available to all users.

- Local The view is available to the current location only but can be used by everyone (that has access the location). This option is available to users with manager/coordinator permission on the location.
- *Global* The view is available for all users at all locations (for the same type of object). This option is available to administrators only.

Ma Sets the current selected view as default (for the current user only!). Default views are indicated by an asteris ke behind the name of the view in the view selector.

def

aul

t

MaTo manage all views that have been created at a specific location (or for a specific user etc.), the views can b na managed to remove, rename or alter the global view parameters (like type or hidden).

ge

vie

ws

Manage Views	able views. The following view types exist:		Ba
- Global: Views can be u - Local: Views can be us	ised by everyone, everywhere. Only system sed by everyone on this location. System a n use and adapt these views. Views are av	dministrators and coördin	
Personal Views			Remove Export Impo
Name	Remarks by Owner	Creator	Published Hidden
Local Views			Remove Expo
Name	Remarks by Owner	Creator	Published Hidden
Global Views			Remove Expo
Name	Remarks by Owner	Creator	Published Hidden
Builtin Views			
Name	Remarks by Owner		Hidden
All Lessons Learned			-
My Lessons Learned			-

Views are shown in respect to their type: personal, local, global or built-in (provided by the application).

Views can be exported or imported from other applications as well to re-use configurations, e.g. from a test environment.

If the user has sufficient permissions, views can be modified by clicking the name and clicking 'Edit':

View Details		Save Cancel
Name:	Needs attention	Creator:
Remarks by Owner:		
Hidden:		
Туре:	Personal 💌	
	Global Local Personal	

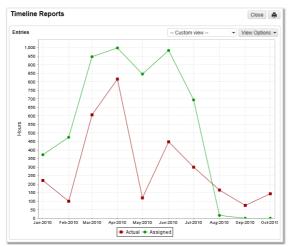
* Will be deprecated in release 7.0

The data that is shown can be exported to Word, Excel or the clipboard for use later on. Finally, views as saved on these locations can be used to create <u>automated reports</u> [142].

4.2 Timeline reports

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.

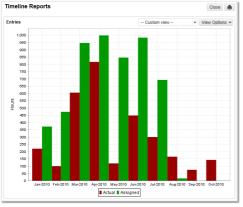
The timeline reports can be found on the same location as the normal reports. So they are available enterprise-, programme-, portfolio- and project level. They are also available in the different modules like time registration and resource management.

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

Entries			i i i	I 🚺	Custom view	· · · · · • • • • • • • • • • • • • • •	View Options -
Туре	No Date	Jan (10)	Feb (10)	Mar (10)	Apr (10)	May (10)	Jun (10) Ju
Actual		220.00	100.00	605.00	0 816.00	119.00	448.00
Allocation				75.60	551.40	240.00	88.00
Assigned		372.00	473.25	946.00	998.00	845.75	982.75
Available				268.8	2,068.48	2,041.00	1,600.00
Capacity		611.49	582.38	669.73	640.61	611.49	640.61
Committed					4.00	10.00	
Planned	7,752.00			692.5	3 761.66	893.16	1,006.35
Request				138.40	749.60	780.20	418.80
Reserved	600.00				-66.67	-175.00	-183.33

Example: Timeline Report Table

The different options in the View options menu are:

Basic Setting Set filters	: To configure the timeline report view : Define a filter to make a selection of	View Options -
	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 column to increase or decrease the column size.	Set Widths
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:		T
Scale:	Months	T
Startdate:	●Dynamic Last month ▼	
Show entries without bookdate (additional column	n): 🔽	
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 filter Is draft Type No filter Selection	Actual Alocation Assigned Available
	Available Budget Capacity Committed Demand EAC ETC

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 EntryCustomBool1 EntryCustomDate1 EntryCustomDate1 EntryCustomDouble1 EntryCustomDouble2 EntryCustomInt1 EntryCustomInt1 EntryCustomRef1 EntryCustomRef1 EntryCustomRef2	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) - Windows Internet Explorer provided by Princ
	, , , , , , , , , , , , , , , , , , ,
Save view	
whether the view sh	d view. Provide a new name or save the view as an existing view. Indicate hould be defined personal (only to be used by you), local (to be used by cation) or global (to be used by everyone everywhere).
Select existing view	to overwrite or save as new view.
Existing View:	new view
Existing View: View name:	new view
0	- new view
View name:	

Save 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 Automated reports

Automated 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.

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, portfolio or project.

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.

Logs		Pro	ducts			Edit	Owner & Miles	tones Edi	t Project Plan	Set Bas	eline	++	-
Net		۲	Project start-up										
I Issue log	10	Θ	Project initiation										
R Risk log	4				Owner	Start	Draft	Checked	Final	P) D)	M R		A
Quality review log	1	~	Initial Business Case		John Edwards	~			~				
C Change log	13	~	Project Initiation Document		John Edwards	\checkmark	\checkmark	\checkmark	\checkmark	- 1	2 1		
A Daily / Action log	15	•	Project Authorisation		Samuel Davies	~	07-Feb-2013		12-Feb-201	3			
Lessons learned log	1	Θ	Requirements & Prototyping										
M minutes of meetings			Requirements & Prototyping		Owner	Start	Draft	Checked	Final	ሮ በ	N R		A
											00	300	9
Automated Reports	Edit		Pilot Preparation (Work Packag	le)	Jeroen van Barnevele	14-Feb-2013			27-Feb-201	3	3 -		
Progress Report			Requirements report		Yung Ji-Lao	14-Feb-2013	18-Feb-2013	19-Feb-201	3 20-Feb-201	3 - 1	1 -	- 1 -	
Highlight Report		L	Database configured		Samuel Davies	17-Feb-2013			27-Feb-201	3	- 1	1 1 -	
		J —											
			Pilot (Workpackage)		Peter Cole	16-Feb-2013			01-Mar-201	3			
My to do List	_		User instruction		Richard Hammond	23-Feb-2013			01-Mar-201	3			
2: Find out about costs []	4)		Pilot evaluation		Richard Hammond	16-Feb-2013			01-Mar-201	3			
			Highlight Reports		Peter Cole	24-Feb-2013			01-Mar-201	3 - 1			
			lext Stage Plan		Yung Ji-Lao	01-Mar-2013	01-Mar-2013		04-Mar-201	3			
			t Stage Authorisation		John Edwards	02-Mar-2013			05-Mar-201	3			
					Sour Lonaido	62 Mai 2010			00 Mai 201				_
			utomated Reports										
		6	Automated reports insert Princi actual content (data) on genera	pal Toolbox data into a W ating the report	ord or Excel merge te	mplate. The Pri	ncipal Toolbox	keywords in	the template	are automa	itically r	eplaced I	by th
			Select a merge template or nor Excel merge templates must be										TF fo
			For a list of keywords, click on	the 'Keyword List' button.									
		1	Templates		Add D	ownload Templ	ate Keywor	d List Ope	n Template	Remove	Show	History	U
		1	Name	Description			Revi	sion Publis	hed Publis	sher	N	lerge	
			Project_Reportv2.xls	Progress Report			v1.4	09-Ap	-2010 Erik A	albersberg	~		

Click 'Edit' at automated reports to manage reports within a project or project model

General Logs Dependent	cies Costs & Hours Resource Demand							
Product: Highlight F	Reports			Edit	Change Picture	Close	Edit Widgets	
Name: Description: Owner Group: Owner: Reviewer: Participants: Priority: Mandatory:	Highlight Reports Project Manager Richard Hammond John Edwards 	Start: Draft: Checked: Final: Duration: Planning Status	Plan date 20-Mai 22-Mai 3:	r-2013	Actual (date		
Product Quality: Finance Total Actuals:	- 0.00							
Helpful Text:	and other project stateholders about the project progress, the eates a Highlight Report with a summary of the project status.							
Deliverables							Add Add I	Vote
Templates Name Highlight_Report.doc	Description Highlight Report		Revision P	ublished	ld Note Remov Publisher 0 Erik Aalbersber	1	v History Up Merge	date
Product Descriptions (Sp	ecifications)						Add Add I	Vote

On product or plan item pages templates for automated reports can be added as well

Within programmes (or project lists) and portfolio's: On the dashboard, at the section 'Automated reports'.

Project list: Quality and Org	janisation projects		Edit Propertie	s Edit Membe	Edit Tole	rances Edi	it Widgets	
Name: Quality and Organisation projects Description: Projects for improving the organisa [more] Status:		Welcome on the startpage of the	iis programme!					
Logs	Projects	New Import	Export Move	Model Arc	hive * Dash	board	Vi	ew Options
New Total	*	Curre	nt Stage Prog	ress Gen	eral Planning	Hours Cos	sts Project I	Aanager(s)
I) Issue log	Apollo project		t initiation					n der Laan
R Risk log	Roll-out of software on desktops		b-2013			• •		
A Daily / Action log 2	Juno Project	Proje	t initiation		•	• •	John Ed	wards
	Back-up of all previous documents	25-M	iy-2010		-			
	Venus project		t start-up		•	•	Peter Co	le
Automated Reports Edit	Logistic optimisation project		t-2012					
Project Report	Zeus Project Roll-out Zeus on clients		p-2010		•	• •	Henk Vis	ser.
Reports	Project Models						Import Exp	ort Archive
Programmes / Project lists	Name 🚖	0	bjective				Own	ier(s)
Projects	Small Prince2 project model		roject model for smi	all and mideize pro	iacte		0111	01(0)
Products / Plan Items	Software implementation project model							
ssues Risks	Software implementation project model Prince2 project model for software implementations Standard Prince2 project model Project model for larger and/or complex projects.							
Changes	Standard Princez project moder	P	roject model for larg	jer and/or complex	projects.			
Quality reviews								
Actions								
essons learned								
Cost / Hour Entries								
Benefits								
Performance Indicators								
Project Resources Entries								
Timeline Reports								

Automated Reports on a programme

In the next sections, you will find more detailed information about creating and managing automated reports.

4.3.1 **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:

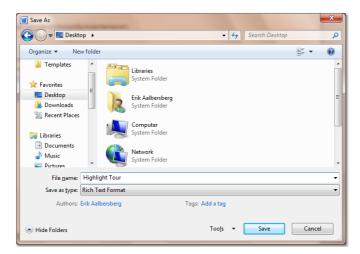
Open Template

- 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.

http://asp.fortes.nl/Principa	l/jsp/Reports/MergeFields.jsp?PageID=12	2638&SetReturnAdrs=false&PopupSi	bling=true	
	and views and click the link to copy the k merge template at the appropriate location			Close
Project fields				
Baseline	Capacity planning	Costs	Costs	
Current Baseline Final Current Baseline Set Current Baseline Set Unital Baseline Set Initial Baseline Set Initial Baseline Set	IT Capaciteit (Custom28) PM Capaciteit (Custom29)	Budget (Custom11) Costs Actual Costs Actual Cinulative Costs Actual Cinulative Costs Committed Costs Budget Cumulative Costs Committed Costs Forecast Costs Forecast Costs Remaining Costs Remaining Cinulative Costs Reserved Costs Variance Cumulative 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 (Custom32) Total Forecast (project) (Custom34) Total Reserved (Custom36)	Hours Actual Hours Actual Cumulative Hours Budget Hours Committed Hours Committed Hours Remaining Hours Remaining Cumulative Hours Variance Hours Variance Cumulative	Hours Active Stage Only Hours Orange (%) Hours Orange (Abs) Hours Red (%) Hours Red (Abs)	

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



7. Go back to Principal Toolbox. To upload the merge template in the Principal Toolbox, click Add in the Templates section (in the Edit Automated Reports window or on a product page). Fill in the following information:

Filename : Locate the RTF-file with the browse button Internal document link : Provide a document ID from a document at another location in the		:	Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the document
--	--	---	---



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 t	the list	Download Template Keyword List
on any document but mus	or normal document / link to upload. Please note that t be saved in the RTF format. Excel merge template: acro's: Click on the 'Download Template' button to do	s must be based on a template 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,xls	m,rptdesign)
Merge Template:	Add this document as a merge template	
miteriet autress.		
Internal Document Link:	Provide a document ID from location in this application. T the document history.	
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.

4.3.2 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 147
- <u>Creating an Excel report template</u>

Note: automated reports within projects are available to project managers and project support.

On programme level they are available to the programme manager, etc.. You will need sufficient rights on your computer to run Excel macros.

Note: Excel reporting is intended for Office 2007+ as of release 6.5. For compatibility with Office 2003 an older version of the Excel template can still be used. Download the old template <u>here</u> and add it manually to the desired location.

4.3.2.1 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.

Home Portfolio Management Organisa	tion Resource Allocation Time Entry Import / Ex	(port				Erik Aalbersb	erg 🔻 H	elp S	иррог		tup
Organisation > Production (EN) > Quality	and Organisatio > Apollo project										1
Dashboard Properties - Product Bre	akdown Plan Gantt Resource Management -	Documents 👻 Portfolio	Report Repo	rts Guide							
Project: Apollo project			Edit	Properties	Edit Members	Pack Projec	t Offline		ē	Q	
Objective: Roll-out of software on desktops Members: Arjan van der Laan [more]	Project start-up Project initiation	Stage 1 Stage 2 Requirements &	Prototyping		Project closu	re					
Status: On schedule. Info: Behind schedule Etc	Directing a Project	Directing a stage	Managing stage boundaries		losing a Project						
FORTES 🕫		Managing Project Delivery									:
		C	Project Board	O Project Man	ager <mark>O</mark> Team M	embers					
Logs	Products		Edit	Owner & Miles	stones Edit F	Project Plan	Set Basel	line	++		
New Total I Issue log 10	Project start-up Project initiation										
R Risk log 4		Owner	Start	Draft	Checked	Final	ច្រា ច្រា	าตา	QC		
Q Quality review log 1	Initial Business Case	John Edwards	~			~		50		-	
C Change log 2	Project Initiation Document	John Edwards	\checkmark	\checkmark	\checkmark	\checkmark	- 1 3	2 1		-	
Daily / Action log 13	Project Authorisation	Samuel Davies	\checkmark	07-Feb-2013		12-Feb-2013				-	
L Lessons learned log 1 M Minutes of meetings 1	Requirements & Prototyping										
		Owner	Start	Draft	Checked	Final	P D	i) R	QC) (A)	
Automated Reports Edit	Pilot Preparation (Work Package)	Jeroen van Barneveld	14-Feb-2013			27-Feb-2013	3	3 -		-	
Progress Report	Requirements report	Yung Ji-Lao	14-Feb-2013	18-Feb-2013	19-Feb-2013	20-Feb-2013	- 1 1	1 -	- 1	-	
Highlight Report	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

Note: Excel reporting is intended for Office 2007+ as of release 6.5. For compatibility with Office 2003 an older version of the Excel template can still be used (contact Fortes Solutions for more information).

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.

When opening the file in Excel, the data is automatically 'refreshed' with the currently available data.

🐹 🛃	1 9 -	0.	₹	and the second second	ProjectRep	ort.xlsm - Micro	osoft Excel	1.0	
File		Home	Insert	Page Layout Formulas	Data Rev	view View	PTB Deve	loper Add-Ins	a 🕜 🗆 🛱 🛛
Insert Chart	Rep	t t Pre orting		Keywords Data Keywords Te Template	ave as mplate Config	ure Help Ab tion General	out		
	A1	-	- (~
A				D	E	F	G	Н	
1 Pro	oject		Apollo		Name				FORTES
3 Iss	su 🚹	ssues	(All Issues)}						FURIES
5 S	Р	Nr	Descript	ion	Туре	Decision	Owner	Due Date	Remarks
6		2	Supplier d	lelivery too late for completion	Concern	Investigation			
7		1	Fix piping	between plants (now leaking)	Issue	Open		19-9-2013	
8									
9 10									
11	4								
12									
13									
14									
15									
16									
17 18									
19									
20									
21									
22									
23									
24									
25 26									
26									
28									
29									
30									
		Repo	rt / 🔁 /						
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 60

4.3.2.2 Creating an Excel Report Template

Creating an Excel report template is done by following these steps:

- 1. Download a basic Excel report template 148
- 2. Open the template and insert keywords 150
- 3. Extending the report data 153
- 4. Finish the template and make the report template available within the Ist Principal Toolbox

For more advanced topics, see the 'Advanced Topics' chapter.

4.3.2.2.1 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 Repor	ts						Clos
		ipal Toolbox data into a W laced by the actual conter				ipal Toolbox keywor	ds in the
document but must be	saved in	rmal document / link to up n the RTF format. Excel m 'Download Tomplate' but	nerge template	es must be ba	ased on the ba		
	click on	the 'Keyword List' button.				Show Histor	Undate
For a list of keywords,		the 'Keyword List' button.	Keyword List	Open Tem	plate Rem		Update
For a list of keywords,	click on	the 'Keyword List' button.				ove Show History Merge	Update
For a list of keywords,	click on	the 'Keyword List' button.	Keyword List	Open Tem	plate Rem	Merge	Update

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.

Note: Excel reporting is intended for Office 2007+ as of release 6.5. For compatibility with Office 2003 an older version of the Excel template can still be used. Download the old template <u>here</u> and add it manually to the desired location.

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	
	- peri				,

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).

I	19 - (21-	* -				ProjectR	eport.xism -	Microsoft Ex	cel					
File	Home	Inser	t Page	Layout	Formulas	Data I	Review V	iew PTB	Develo	per Add	-Ins		(2) ه	- 6
7		Ê	1	\bigcirc			6.L (?	(i)						
J.		Create	<i>•</i>		LL L		figure Help	About						
nsert Thart	Insert Pivot Pre	esentation	Keyword	s Data K	Toggle Sav eywords Tem	plate Con	figure Help lection	About						
	Reporting	g		Temp			General							
	A1	-	0	f _x										
4	A	В	С	D	E	F	G	Н	1	J	K	L	М	Ν
2														
D														
1														
2														
3 4														
4 5														
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7														
8														
9														
0														
1														
2														
3 4														
4 5														
5														
7														
B														
3		_												
${}^{+}{}^{+}$		orts 🧷 🔁									_			▶
eady	2											100% —		

Empty Excel file

Note that you should now have a special ribbon (PTB):

Insert Insert Create Chart Pivot Presentation	Open Refresh Toggle Save a Keywords Data Keywords Templa	s Configure Help About
Reporting	Template	General
Excel ribbon		

The ribbon provides three sections:

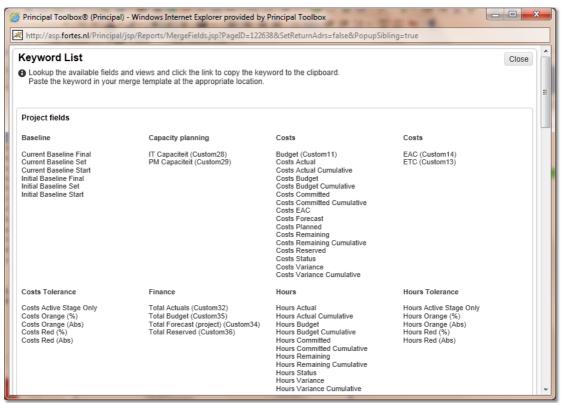
- <u>Reporting</u>, provides options available to templates as well as generated reports like pivoting, charting and PowerPoint presentation. generation.
- <u>Template</u>, provides functions applicable to building a template: opening available keywords, refresh data, toggle visibility of keywords in the template and saving the template.
- General, configuration, help and an about dialog.

4.3.2.2.2 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.



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.

X		ŋ -	(° ·	₹	and a second sec	ProjectRep	ort.xlsm - Micro	osoft Excel		
Fi	ile	ŀ	lome	Insert	Page Layout Formulas	Data Rev	riew View	PTB Devel	oper Add-Ins	x 🖬 🗆 🕃 a
Inse Cha	ert I art		t	Create sentation	Open Keywords Data Keywords Te Template	ave as Config mplate		out		
		A10)	• (f _x					*
- 2		В			D	E	F	G	Н	I
1	Proj	ect:		Apollo		Name				FORTER
3	lssj	µ[<u>{Is</u>	sues	(All Issues)}						FORTES
5	S	Р	Nr	Descript	ion	Туре	Decision	Owner	Due Date	Remarks
6			2	Supplier d	lelivery too late for completion	Concern	Investigation			
7			1	Fix piping	between plants (now leaking)	Issue	Open		19-9-2013	
8										
9 10										
11	 å									
12										
13										
14										
15										
16										
17 18										
19										
20										
21										
22										
23										
24 25										
25 26										
27										
28										
29										
30										
			lepo	rt / 🞾 /						
Rea	idy	2								

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.

D 🔒 .	Arial	- 10	· A A		Seneral	Ŧ	<s 8</s 	1	Σ AutoSum *	27 🗥
aste 🝼	BIU	• 🖽 •	<u>⊘</u> - <u>A</u>	▼ 書 書 篇 譯 譯 圖 Merge & Center ▼ 5	∛ • % •	00. 0.≯ 0.♦ 00.	Conditional Formatting	Format Cell Ins as Table * Styles *	sert Delete Format	Sort & Find & Filter * Select *
pboard 🗔		Font		🕞 Alignment 🕞	Number	Gr.		Styles	Cells Editi	ng
E20		- (B	f_{x}							
A	В	С	D	E	F	G	Н		J	К
Name		me ls nd Organisa								
Issue Log	Priority	Status	Nr	Description	Documer	Туре	Decision	Owner	Product / Plan item	Due Date
	Low	Open		8 Slow Internet connection		Issue	Open	Samuel Davies	Pilot Preparation (Work Package)	
	Critical	Open		7 Bug found in version 7		Off-spec		John Edwards	Pilot Preparation (Work Package)	
	High	Open		6 Delay in system development		Concern	Deferred	Jeroen van Barneveld		17-6-2010
	High	Open		5 Request for change of the page layout		RFC		Yung Ji-Lao	Pilot Preparation (Work Package)	
1	High	Open		4 Different page layout		RFC		Samuel Davies	Updated user documentation	1-4-2010
_	Low	Open		3 Request for more background material		RFC		Richard Hammond	Requirements report	28-5-2010
	Critical	Open		2 Request for roll-out on Macintosh machines	0	RFC	Investigati	Samuel Davies	LE LE LA D	19-4-2010
1	Normal	Open Open		1 test issue				Gerard Mesen Gerard Mesen	Highlight Reports	
5	Normal High	Closed		1 test 1 The PID does not include a proper risk analysis		Concern	Investigation	Gerard Mesen	Project Initiation Document Project Initiation Document	31-12-2004
5	riign	Ciused	-	The Pib does not include a proper risk analysis		Concern	investigati	Geraru wesen	Project initiation Document	31-12-2004
1		-	-		-	1	-	1		
3										
)										
3 9 0 1										

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.

4.3.2.2.3 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 start, it assumes that an appropriate view is created in the Principal Toolbox and is available as a keyword for use in the Excel template. As a result, a template as shown below could be created.

Fi	le	Ho	ome	Insert Page Layout Formulas	Data Re	view	View	PTB Deve	loper	Add-Ins				۵ 🕜	- đ
] ¥	6 	Aria				General	Ŧ				Breansert ▼ Σ Provente ▼ United Tests T		A	
as		3	B				-				ormat Cell Fable * Styles *	🗒 Format 🐐 🧷	Filter *		
pł	board	J5		Font 5	Alignment	F ₂₄	N	umber 5	ž	Style	25	Cells	Editing		
	AE		0	▼	E		F	G		Н		1	J	K	
	Proje			Apollo			г	G		п			J	K	_
	Issu			1 4010							F	ORTES 🕫			
	_	_	-	Description	Туре	Deci	sion	Owner	D	ue Date	Remarks				
I			2	Supplier delivery too late for completion	Concern	Inves	tigation						1		
			1	Fix piping between plants (now leaking)	Issue	Open				19-9-2013					
2															
;															
;															
1															
;															
)															
2															
;															
)															
)				rt 🕲							[] ∢				

Extending the report data

To add the calculated impact data, a column heading is added next to the 'Remarks' column. Also, in the cell below this heading, the following formula is entered:

==IF([@[Due Date]]="";";IF([@[Due Date]]<TODAY();TRUE;FALSE))

(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.

		9 -	0	↓ Proje	ctReport.xlsm	- Microsoft Exc	el		Table Tools			×
File		ŀ	lome	Insert Page Layout Formulas	Data Rev	iew View	PTB Develo	oper Add-Ins	Design		≈ 🕜 =	- a - Σ
Paste		K ≧ - ≶ ∣ ⊑		$\begin{array}{c c} & & & \\ & & & \\ \hline & & & \\ I & \underline{U} & - \\ \hline & & \\ \hline & & \\ \hline & & \\ \hline \\ \hline$	目 律律			Conditional Fo Formatting ~ as T Style		Insert → Σ Delete → I Format → Cells	Sort & Find & Filter Select + Editing	
		SUN	N	- (× ✓ fx =IF([@[Due Da	te]]="";"";IF([@[Due Date]	<pre></pre>	E;FALSE))				
		В		D	E	F	G	Н		- I	J K	
•		ect:		Apollo						FO	RTES 🕫	
	ssi S	le	-	Description	Turne	Desister	0	Due Dete	D	101		
5 -	5	P	Nr 2	Description Supplier delivery too late for completion	Type Concern	Decision Investigation	Owner	Due Date	Remarks		Overdue	
,				Fix piping between plants (now leaking)	Issue	Open		19-9-2013				
3												
1												
0 1												
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6 7												
8												
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)												
1 2												_
2 3												
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9												
	► H	F	Repo	t 🕲 /			1					▶ [
dit		2	1							III II II 10	0% 🕞 🚽	

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).

4.3.2.2.4 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 [148].

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		This will be the title of the report shown on the dashboard
Revision/Doc nr.	:	Use this to give a version number to your template
Filename	:	Locate the XLS-file with the browse button
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.

IMPORTANT: Make sure the checkbox 'Document is a merge template' is ticked!

on any document but mus contains the necessary m	the list or normal document / link to upload. Please note that to to be saved in the RTF format. Excel merge templates accro's: Click on the 'Download Template' button to dow k on the 'Keyword List' button.	must be based on a template which
Add a document/link		
Description:		
Revision/Doc Nr.:		
Filename: Merge Template:	Browse (rtf,xtt,xttm,xls,xlsm	n,rptdesign)
 Internal Document Link: 	Provide a document ID from a location in this application. Th the document history.	
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> Excel report 147.

4.4 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										
Portfolio	: Portfolio	ICT (NL)				Edit Prop	erties	Edit Members	Customise Page Tex	Edit Field Configuration	Edit Page Layout	Edit Widgets		ð	٩
Name: Descriptio Status: Status Descriptio	Portfolio ICT n: Portfolio Ove de ICT afde • n:	erzicht van	6000	more	C F	Portfolio Overzicht / Dverzicht van alle IC TE per kwartaal. Ma neer nodig is, moet r	T projec ximaal	ten met de priorif aantal FTE besch							
Automated		Edit	Projects P	ie Chart		Filter Configure	Bo	llendiagram (f	Projecten)	Configure Timeline	Budget (Costs)	Con	figure		
Reports Projects (Por Products / Pl Issues	rtfolio Manageme an Items	ent)		20%	2	Single Sheet Project		6		50000 - 40000 -	Budget (Costs)				
Risks Quality revier Changes Actions							Internal	2		- 00000 - Starter - Starte					
Lessons lear Cost / Hour E Entries				60	94			0		10000 -	11				
Timeline R	eports							-2 2 0	2 1 10	0 0					
Entries			Total Count pr	rojects: 5					Market			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	◎ <u>1</u> 1 2	1 2 3			
Widget column 1	Pie Chart	•			
Widget column 2	Bubble Chart (Projects)	-			
Widget column 3	Bar Chart	T			

Edit the widget lay-out

Widgets will now be displayed on the page. Once displayed, almost all widgets have three common buttons:

Allows to configure the widget. Configuration varies per widget. Allows to filter the set of objects that the filter includes in its representation. Allows to create an image of the current displayed widget. The image can be used to include in your report.

Configure

P*

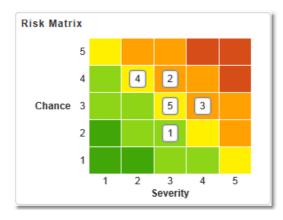
Filter

Different widgets exist for different locations:

Widget

Avail Remarks able at ... Proje Shows risks in

Risk matrix



cts	respect to their
only	chance and
-	severity. Can be
	shown on the
	project reports
	tab as well as on
	the projects' risk
	log.

Proje Shows planned

cts

only

versus actual

hours within a

configurable period. Provides

a burn-rate

(burn-up or

planned and

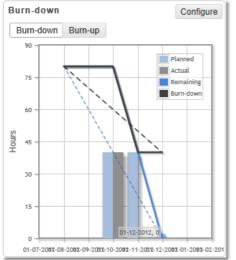
project

progress.

burn-down) as

actual to monitor

Burn-down chart



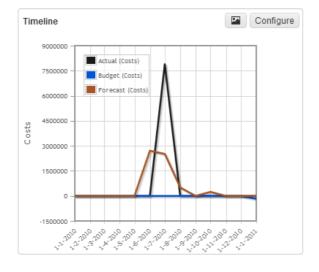
PRINCE2 process diagram

Project initiation	Project start-up	Execution stage	Project closur
Directing a Project			
Starting Up a Project	Initiating a Project	Controlling a Stage Managing Product Delivery	Closing a Project
		Project Board Project Manage	r 😑 Team Memb

Timeline chart

Gene	Shows the
ric	PRINCE2
<u>plann</u>	project process
ing	in respect to the
<u>proje</u>	project plan and
<u>cts</u>	progress.
74	
only.	

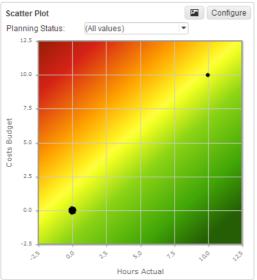
Proje	Shows timeline
cts,	information on
progr	costs and/or
amm	hours for
es	selected types
and	(budget, actual
portf	etc.).
olios	



Gauge meter



Scatter plot



Bubble chart

Progr	Shows a single
amm	value against a
es	conditional
and	meter indication
portf	(green, amber,
olios	red).

Progr	Shows projects
amm	weighted to
es	different axes.
and	An indication of
portf	good/bad can be
olios	shown using
	different colour
	gradients.

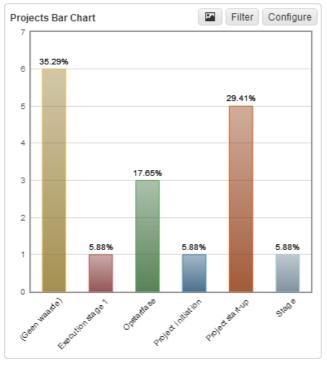
Progr	Shows projects
amm	weighted to
es	different axes.
and	Additionally, the
portf	size can be
olios	used for

indication of

impact.

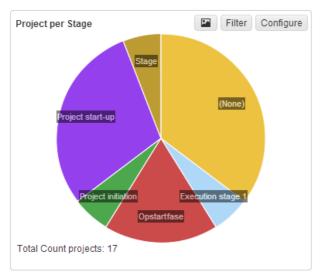


Bar chart

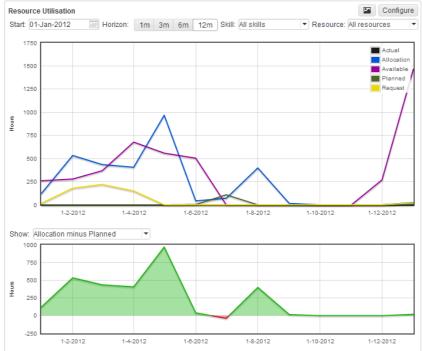


Pie chart

Progr Shows project amm values grouped es by different and options in pie portf layout. olios

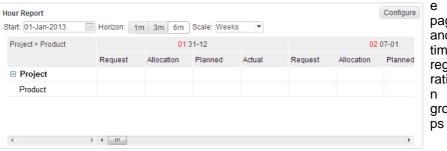


Resource utilisation



Reso Shows utilisation urce information of a pool resource (availability vs. allocated) but also whether the request and allocation are leveled etc.

Personal hours



Hom Shows hours e planned, actual page etc. for selected and users time (resources). On regist the home page ratio this applies to n the current user. grou ps

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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.

	Standard Principal Toolbox view;
Custom layout Custom layout with approval	To choose which fields are visible on the product page. To customise and define an approval for the page.
y	

Product: Project	t Initiation Document (PID)	Edit Change Pict	re Close	Page Layout 🔻	Approval Settings	Edit Widgets	\mathbb{Z}
Name:	Project Initiation Document (PID)			Planned	Actual date		
Description:	Includes project plan	Start:		date			
Owner Group:	Project Manager						
Owner:	-	Check					
Reviewer:	-		: -				
Participants:	-	Final:	-				
Priority:		Duration:		0.00			
Mandatory:		Planning 9	atus:				
Finance							
Total Actuals:	0.00						
basis for the project c means the PID also p Board and Project Ma	t Initiation Document is to define the project and creat Initiation and determination of success of the project. Th lays a role <i>during</i> the project. It is a baseline for Proje mager to gauge progress, evaluate changes and keep PID answers the what, why, who, how and when o	is ct oan					

- Product page
- 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 memb Persons defined 		Owner		-	
On approval set field:	Final	Ŧ	to	Approved		

- 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

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**'.

button.

pprovers:	Selected Approvers:	Available Approvers:	
		Erik Aalbersberg	
		>>	
ue date:			
emarks:			^
			-

9. The approver(s) will be informed through an email and will have a note on their 'Home' page.

Documents to be appr	roved 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	
Name: Descrip Owner Owner: Review Particip Priority Mandat	Group: ver: pants: v:		roject Initiatie Docu roject Manager	ment (PID)	- - - Du	Start: Draft: Checked: Final: iration: anning Statu	dat	nned te 0.00	Actual date 		
Product Finance Total A		-	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**'.

5.2 Classic Project Migration

As of release 6.5, <u>classic PRINCE2 projects</u> and be migrated to <u>generic PRINCE2 projects</u> default, this option is <u>not</u> activated as it requires configuration by your administrator before migrations can be performed.

The generic project planning provides flexible planning support and improved usability that allows for activity planning, multiple breakdowns, integrated cost/hour planning etc. However, some functionality

is deprecated in the new planning that is available in the classic planning:

- The classic plan tab is no longer available, this is now integrated in the planning
- · Unused work packages are no longer maintained separately
- · Microsoft Project export/add-in is no longer available
- · Classic cost/hour administration is replaced entirely

Note: Once migrated, projects cannot be migrated back. Therefore, this option should be used with great care as certain information might be lost (see below) and functionality changes significantly within the project.

Note: If possible, it is advised to finish the project rather than migrate the project to the generic PRINCE2 planning.

Note: Verify custom calculations on products and projects to be compatible with the new planning before migrating projects.

The general approach to enable project migration is as follows:

- 1. Configure project migration at Setup > Configuration > Classic Project Migration
- 2. After activation, migrate the original classic project model(s)
- 3. After migrating the original model, migrate classic projects based on this (these) model(s)

1. Configure project migration

At Setup > Configuration > Classic Project Migration the project migration can be configured and activated (after configuration).

Options	Migration of classic PRI	NCE2 projects to nev	/ planning			Migration of classic PRINCE2 projects to new planning									
 Principal Toolbox Classic Project Migration Notifications 	The new generic project planning etc. However,						le breakdowns, integrated	cost/hou							
MS Project integration Conversions Manage Hour Rates Project Plaza Currencies	The classic plan tab is no longer available, this is now integrated in the planning Unused work packages are no longer maintained separately Microsoft Project exportAdd-in is no longer available Classic cost/hour administration is replaced entirely														
Resource Categories	To see what the new pl	To see what the new planing offers, please refer to the help pages.													
Financial Categories Manage Resources	A Migration cannot be	undone and is irrever	sible.												
Manage Skills	Migrate fields	- Miorate fields													
Time Entry Manage entries Manage Non-project Activity Sets Resource Allocation Customize fields							do with the content of these ose fields will be lost after to Status								
Approval entries		NO GECISION	©	Сору	Fiameu	→		-							
	Droft														
Advanced Configuration	Draft:	٢	0	0											
	Draft: Checked:	0	0	0	-	 ▼	▼	-							
		 No decision 	0	0											
		٢	Õ	0	Field			-							
	Checked:	No decision	Not used	Сору	Field			-							
	Checked: Reviewer: Pre-select on Time	No decision	Not used	Сору				•							
	Checked: Reviewer. Pre-select on Time Sheet(s):	No decision ©	Not used	Сору	Field 										
	Checked: Reviewer: Pre-select on Time Sheet(s): Migrate fields	No decision ©	Not used	Сору	Field 										

Migration of classic project planning

Initially, the migration option is disabled and cannot be activated unless some decisions are taken for the following information:

- · classic draft and check milestones
- classic reviewer role
- pre-select option for time sheets¹

¹ For time entry, a general approach is available to select products / plan items to appear on time sheets, see <u>time entry configuration with planning</u> <u>filters</u> [12] where support for activity planning is 'Yes'.

For each of these it must be decided whether the information is no longer used or copied to custom fields. These custom fields need to be created before selecting at this configuration. Once this has been configured, the migration can be activated, see below.

Options	Migration of classic PRIN	ICE2 projects to nev	v planning					Save Cance			
Principal Toolbox Classic Project Migration Notifications Manage Hour Rates Project Plaza Currencies Resource Categories Hanage Resources Manage Resources Manage entries Manage entries Manage entries Manage entries Manage Negentries	planning etc. However, s The classic plan Unused work pan Microsoft Project Classic cost/hou To see what the new pla Migration cannot be u Migrate fields	The new generic project planning provides flexible planning support and improved usability that allows for activity planning, multiple breakdowns, integrated planning etc. However, some functionality is deprecated in the new planning that is available in the classic planning. • The classic plan tab is no longer available, this is now integrated in the planning • Unused work packages are no longer maintained separately • Microsoft Project exportadd-in is replaced enthrely To see what the new planning offers, please refer to the help pages. Migration cannot be undone and is irreversible. Migrate fields Not all fields are available within the new planning as they are rarely used or replaced by new functionality. Please select what to do with the content of these. Either choose to copy the content and select the desired destination field(s) or confirm that the field is not used, any content for those fields will be lost after migration.									
Manage Non-project Activity Sets	Either choose to copy the										
Manage Non-project Activity Sets Resource Allocation Customize fields	Either choose to copy the										
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the	e content and select	the desired destinati	on field(s) or confirm	n that the field is not us	ed, any content for the	se fields will be lost				
Manage Non-project Activity Sets Resource Allocation T Customize fields	Either choose to copy the migration.	e content and select	the desired destinati Not used	on field(s) or confirm Copy	n that the field is not us	ed, any content for the Actual	se fields will be lost Status	after the			
Manage Non-project Activity Sets Resource Allocation El Customize fields Approval entries	Either choose to copy the migration.	e content and select No decision	the desired destinati Not used ©	on field(s) or confirm Copy ©	n that the field is not us	ed, any content for the Actual	se fields will be lost Status	after the			
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the migration.	e content and select No decision ©	the desired destinati Not used ©	on field(s) or confirm Copy ©	n that the field is not use Planned 	ed, any content for the Actual	se fields will be lost Status I▼	after the			
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the migration.	e content and select	the desired destinati Not used © Not used	on field(s) or confirm Copy © Copy	n that the field is not use Planned 	Actual ▼ - × - × -	Status	after the			
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the migration.	e content and select No decision O No decision O No decision O	the desired destinati Not used ම Not used ©	on field(s) or confirm	n that the field is not use Planned 	Actual ▼ - × - × -	Status	after the			
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the migration. Draft: Checked: Reviewer: Pre-select on Time Sheet(s): Migrate fields	e content and select No decision O No decision O No decision O	the desired destinati Not used ම Not used ©	on field(s) or confirm	n that the field is not use Planned 	Actual ▼ - × - × -	Status	after the			
Manage Non-project Activity Sets Resource Allocation Customize fields Approval entries	Either choose to copy the migration. Draft: Checked: Reviewer: Pre-select on Time Sheet(s):	No decision No decision No decision No decision No decision Yes	the desired destinati Not used ® Not used ©	on field(s) or confirm	n that the field is not use Planned 	Actual ▼ - × - × -	Status	after the			

Activating migration

The migration option needs to be set to 'Yes' to activate the migration at project models (and projects). Also, it can be set whether administrators and/or project managers can perform the migration. By default this is set to administrators only.

2. Migration at the project model

Once activated, the migration option is shown on project models.

Note: Migration is not available at projects itself until the project model that the projects are based on has been migrated!

The header of the project model now shows a 'Migrate' button in amber. For users allowed to perform the migration, a click will bring up the dialog shown below. If the user clicks 'Migrate', the project model is migrated.

Project Model: Software imple	emen	tation pro	oject model		Edit Properti	es Edit	Members	Configure Proc	ess Diagram	Migrate		ē 0
Objective: Prince2 project model for software [more]	Р	roject start-	up Project initiation	Stage 1 Stage 2 Stage 2	Stage 3 nts & Prototyping)	Project	closure				
Status:	Dire	ecting a Projec	z									
Info:	-	1	iect Initiating a Project	Directing a stage	Managing sta		Closing a l	^				
	018	rting Up a Proj		Managing Project Delivery	Project Board							
			Migrate to New Planning									
				oject planning provides								
Logs New Total	Proc	lucts Project si		hat allows for activity pla r planning etc. However, vailable in the classic pla	some functionali			estones Edit	Project Plan	Set Baseli	ne +	+)
1) Issue log			 The classic plan ta 	b is no longer available,	this is now intear	ated in th		Checked	Final	P D I	RQ	
R Risk log		Project Mar	planning									
Q Quality review log		Project Brie	Unused work packages are no longer maintained separately Microsoft Project sport/add-in is no longer available Classic cost/hour administration is replaced entirely									
		Initiation Sta										
C Change log	Θ	Project in	To see what the new plani	ng offers, please refer to	the help pages.							
A Daily / Action log	0	Projectin	Å Migration cannot be un	done and is irreversible.				Checked	Final	P D () (R) (Q) (C) (A
L Lessons learned log		Initial Busin										
Minutes of meetings		Project Initia			I	Aigrate	Cancel					
		Project Auth	orisation									
Automated Reports Edit	_	Denviren	nte O Destatuele e									
	Ξ	Requireme	ents & Prototyping	Own	er	Start	Draft	Checked	Final	P D I	R	
My to do List												
		Requireme	ents (Work Package)									
		Interviews	3									
		Requireme	ents report									
		Pilot (Work	package)									
		Server ins	tallation									
		Undeted or	ser documentation									

Migrate project model to generic project planning

After migrating the project model, the same option appears at the related projects as well. The outcome of the migration would then look like this:

ject: In	mplem	ient SAP									
t	C	osts Resources									
ject Gan	ntt		= Stane	Work Pack	2.0 0.00	nacialist P	oduct • Mana	gement Produ	ct Board Product Acti	vity Product Breakdown	
,			e otago			lo Baselin		Q - View:		- -	Specialist Product
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		tial Business Case			0% 🧹					- User	instruction
	-	oject Initiation Document (PID)			0% 🧹					🗄 – Technica	l products
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		lot (Workpackage)			0%						
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÷	- Full ro				0%	6					
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6 System Administrator: Configuration & Settings

The administrator can simply control the Principal Toolbox via the 'Configuration' and the 'Settings'. In order to access the 'Configuration' you need to click **Setup** in the dark blue header of the Principal Toolbox application and select **Configuration**. To access the 'Settings' you need to click **Setup** in the dark blue header of the Principal Toolbox and select **Settings**. These functions are initially only available to users with administrator rights.

Settings
occurgo
Option Classes 1 Result should add on a log data 1 Result should add add add add and a log data 1 Result should add add add add add add add add add a

Configuration page

Settings page

On the Configuration page you can find several functional configuration options, such as non-project activities and custom fields.

On the Settings page you can set technical settings related to the system such as mail server etc.

6.1 Configuration

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 168
- Email notification 168
- Creating non-product activity sets 168
- Defining custom fields 172

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 T	oolbox			•
		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	t integration (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 ' No '
		Customer installer instruction text		Needs to be changed when a specific customer instruction is needed here.
Time entry	r (add-on)			
	Manage time sheets			Click ' New ' to create new time sheets or select a specific time sheet and click ' Remove ' to delete.
Cost entry	(add-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.

onfiguration	ation Resource Allocation Time Er	ary import / Export					Erik Aalbersberg 👻 He	ip Support Sett
Principal Toolbox	Manage Non-project Activity Non-project Activity Sets	Sets			New Remo	ve * All N	Non-Project Activity St 🔻	View Options
Notifications MS Project integration	Name 🌲	Objective			Budget Ac	sts tual		
Conversions	Niet-Project Activiteiten		0.00	0.00	0.00	0.00		
Manage Hour Rates	Non-Activités du projet		0.00	0.00	0.00	0.00		
Currencies	Non-Project Activities		0.00	14.00	0.00	0.00		
Resource Categories	Non-Projekt-Aktivitäten		0.00	0.00	0.00	0.00		
Financial Categories Manage Resources Manage Skills Time Entry Manage Non-project Activity Sets Resource Miscoline Customice fields Approval entries								

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	vity 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 Project	Activities	Save Cancel
	s and activities to the list b ategory. Rename categori iem.	
New category	New activity	
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.

New activity	/	

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/ Work package/ 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 alphanumeric characters, spaces and/or the following special characters: []() + : . & Custom 4
Order Number: Category:	The order number is used to sort fields (within their categories) on detail pages.
Abbreviated name: Description: Visibility: Editable: Type: Width (in pixels): Default value	The abbreviated name is the used field name when categories are displayed Custom 4 ♥ Show on property pages. ♥ When checke field is editable by owner else it is read-only String (free text entry, max 255 character length) I♥ 80
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:

Available for use	:	Highlight to make the field available on the pages.
Field name	:	Name of the custom field.
Field description	:	Description of the field.
Editable	:	Highlight to make the field editable.
Field type	:	Select the type of the custom field.
Field width	:	Width of the field on the screen.
Field default value	:	Default value of the field.

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.
Pick list (single)	:	From the pick list only one can be selected.
Pick list(multi)	:	From the pick list multiple values can be selected.
Person (single)	:	From the pick list only one person can be selected
Person (multi)	:	From the pick list multiple persons can be selected
Image (single)*	:	From the pick list only one can be selected. The value is shown by an
		image rather than text.

When selecting a pick list, a new data field will appear named 'Pick lists 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 pick list with the values; --,-,0,+,++.

General	Logs	Dependencies	Costs & Hours	Resource Demand					
Produ	ict: Pi	roject Initiat	ion Docume	nt (PID)				Save	Cancel
Name: Descrip Owner Owner Review Particip Priority Manda	ption: Group : ver: pants: y:	: [Project Initiation Doe Project Manager Erik Aalbersberg	cument (PID)	Start: Start: Checked: Final: Duration: Planning Status:	Planned date 26-Jul-2011 	Actual	date	
Finance	ct Quali		- 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 !

* Image fields are available as of release 6.1

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 [174]

174 Principal Toolbox 6.5

- management of users 175

6.2.1 Licenses

Under the heading License key on the Settings page you come across a number of options:

- <u>Request license key</u> 174;
- Request additional user licenses 174;
- Renew expired license key 174;
- Enter license key 175;

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.

6.2.2 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.

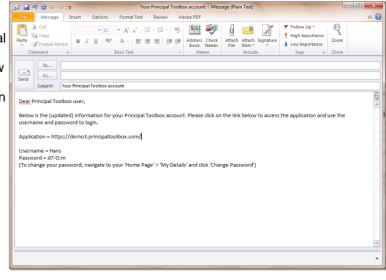
3. Further click Add	n Resource Allocation T	ime Entry	Import / Export			Erik Aalbersberg	🗧 🗝 Help S	upport Setup	
in order to add a	Settings								
new user.	Options ++	User Administration							
	 License key and updates 	System Users		Edit New	New named user	Edit Account Details Remove Person	* All Users	▼ Vie	ew Options 👻
	System status User Administration	Last Name 🌲	Initials	First Name	User Name	Email	Administrator	External	Login disabled
4. The screen Add	Current activity	Aalbersberg	E	Erik	Erik	e.aalbersberg@fortes.nl	×		
	 System Settings 	Administrator	S	Support	admin	support@fortes.nl	V	-	
<i>person</i> appears,		Clarkson	J.	Jeremy	Jeremy	jclarkson@mail.com		-	
		Cole	Ρ.	Peter	Peter	p.cole@fortes.nl		-	
fill in the following		Davies	S	Samuel	Davies	Davies@mail.com		-	
in in the following		Edwards	J.	John	Edwards	erik@fortes.nl		~	
data:		Efflink	М.	Marco	Marco	info@efftinkconsulting.nl	×	-	
uala.		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.



As of release 6.5, the Principal Toolbox allows for <u>user groups</u> 177 as well.

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)	:	
Fax	:	Fax number.
Mobile	:	Mobile phone number.
Birthdate	:	Date of birth.
Gender	:	Male or female.
Remarks	:	Any remarks.
Calendar	:	Calendars applicable to the user

Peter	User Name:	Peter	
Ρ.	Password last changed	31-May-2010	
Cole	Administrator:		
p.cole@fortes.nl	External:	-	
	Default Hour Rate:	Rate 120.0	
	-		
	P. Cole p.cole@fortes.nl	P. Password last changed on: Cole Administrator: p.cole@fortes.nl External: Default Hour Rate:	P. Password last changed on: 31-May-2010 Cole Administrator:

Person details

6.2.2.2 User Groups

User groups can be created to make user administration within the Principal Toolbox easier. As an example, consider a department where all department users need permission to view projects within a work area (programme). By defining a user group and adding the appropriate members, only the user group needs to be added to the work area to allow all members within the user group to view the projects within this work area.

To add and/or modify user groups, navigate to the <u>user administration</u> and click the user group tab.

Name:	IT Maintenance	
Description:		

Once a group is created, users can be added to the group.

T Maintenance			Edit Close
Name:	IT Maintenance		
Description:	on: Users related to our IT maintenance team		
Group Members			Add / Remove
	Email	Remarks	
Name	Email	Remarks	
Name Cole, Peter	p.cole@fortes.nl	Remarks	
		Remarks	

Add and remove users to a group

Once users have been assigned, user groups can be set to the membership at various locations in the application, for example the members of a programme or portfolio. Groups are shown in blue and have the text '(User group)' added to their name.

elect area members			
Programme Manager Cole, Peter Programme Support IT Maintenance (User group)	<- Add Remove C- Add Remove	Ji-Lao, Yung Nijenhuis, Sander Peltzer, Ruud Swank, Albert van Binsbergen, Thijs Vierkant, Remco	
Programme Reader Edwards, John	•		
	<- Add Remove		

Edit members with groups

Note: In release 6.5 it is not yet possible to assign a user group to a time entry group or resource pool.

once a user group is set, users of the group inherit the permissions that the user group itself is set to. For example, users now have reading permission on the programme that are set to in the example above.

6.2.2.3 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

User Login Settings		Edit
Jser administration settings		
Customize the following settings by clic o save any changes, click 'OK' or clic	cking on the edit button. k 'Cancel' to return to the current settings.	
Settings		
	Value	
Login type 🔒	Principal Toolbox authentication (Form Login)	
Multiple user domains 🚯	No	
Password expiry time in days ('0' is no expiry)	0	
Maximum incorrect login attempts ('0' is infinite)	3	
Lockout duration ('0' is infinite)	15	
Minimal password length 🚯	6	
Mix upper and lower case letters in passwords	Yes	
	No	
Use special symbols in passwords 🚯		
Use special symbols in passwords () Use numbers in passwords ()	Yes	

User login settings

These settings can be changed:

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 password. ('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	ngs			
		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> <u>Advanced options</u> 178		
	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 synchronisation and Single-sign-on options

6.2.4 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.

7 Troubleshooting and Solutions

7.1 Troubleshooting

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 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.			

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Sort	Issue	Solution			
Edit Proje	Edit Project 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	Gantt 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.			
Miscellan	Miscellaneous				
	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).			
	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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