Version 8.0

User Manual

SIMPLY FORTES.

Principal Toolbox 8.0

Printed: 2015

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1 Introduction to the Principal Toolbox

Principal Toolbox offers a powerful set of tools for the management of your projects, folders 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 the 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 located in the right-hand top of the main page. 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: Download User Manual as a PDF file

> ***Note**: This manual is to support release 8.0. Where applicable, notes about the required version is stated.*

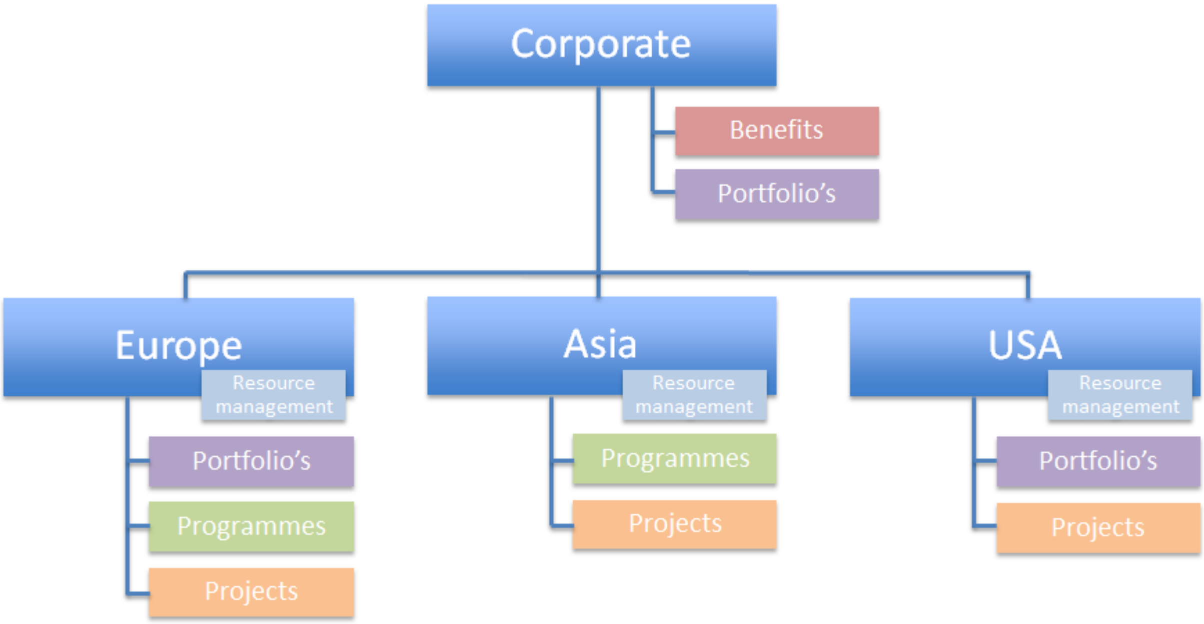
Older versions of the manual (English) can be found below:

Version	Link
5.5	Manual
6.0	Manual
6.5	Manual
7.0	Manual
7.5	Manual

1.1 Structure of Principal Toolbox

As of release 8.0 organisational units have been introduced. To read about organisational units in detail click here 14.
The introduction of organisational units has restructured the Principal Toolbox.

The functionality within the Principal Toolbox can be organised in a hierarchical structure. This allows to enable functionality at the appropriate level.
Organisational units enables to group data according to the organisational view (countries, business units, teams, products, etc.).
For every organisational unit the time entry and the resource allocation may be combined into resource management.
It also enables local portfolio and programme/project management and additional reporting levels.
The picture below shows an example of what the hierarchy can be within the Principal Toolbox.



Example of an enterprise hierarchy. Each OU will have its own span of control for managing portfolio's, programmes and projects.

This structure can be changed to fit your organisation's needs. The highest level is generally referred to as the 'enterprise level'. Within every individual organisational unit, folders can be added to organise programmes and projects.

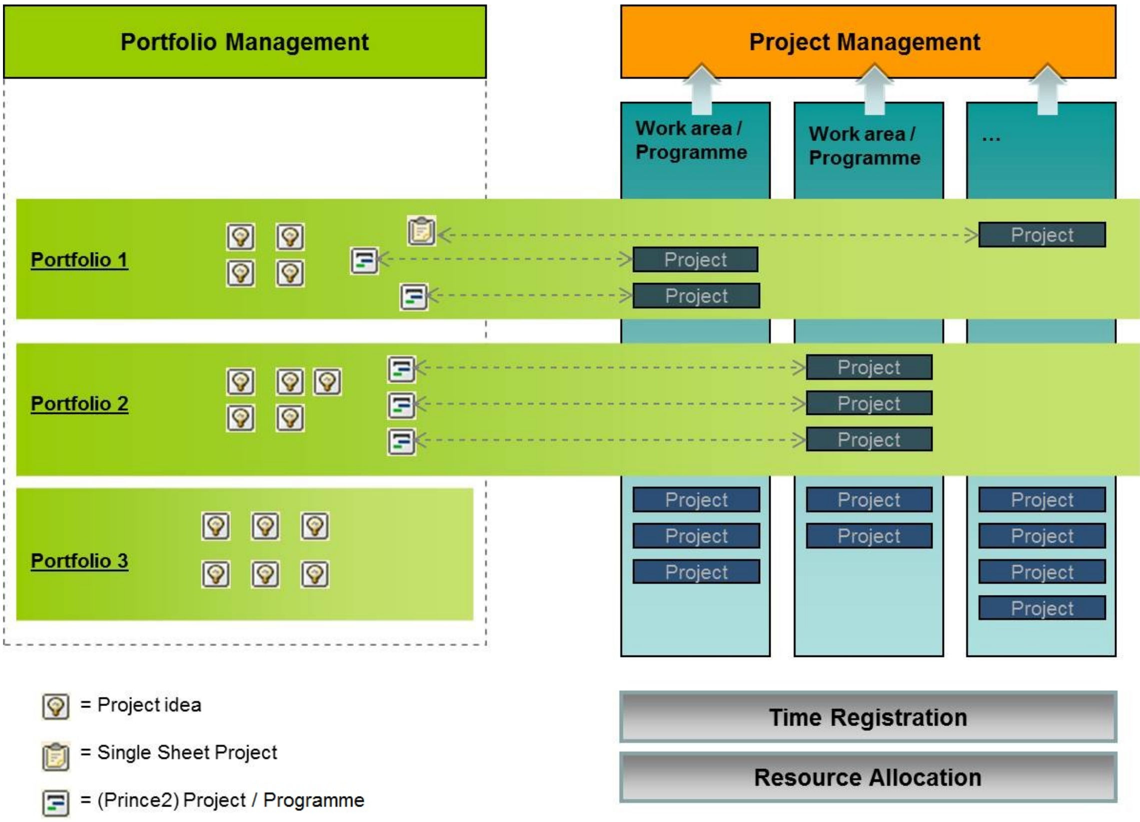
The folders can be any of the following types:

- Sub folders, programmes and projects: can contain sub folders, programmes and projects
- Sub folders and programmes: can contain sub folders and programmes
- Projects: can only contain projects

By choosing the right type of folders, the actual structure of for example 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 organisational unit(s).

The same projects that have been fit in with this hierarchy (reflecting the organisational structure), can also be made part of a portfolio. Portfolios are managed in a separate area within the Principal Toolbox, and this functionality is provided by an add-on module (Portfolio Management add-on 40).

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	1 GB or more
Browser	Microsoft Internet Explorer 9 or later, FireFox or Google Chrome[1, 2]
Display	Resolution 1024x768 or higher
Requirements for using reports and exports:	
Software	Microsoft Office 2007 or later [3]
Software	Adobe Acrobat Reader

If you experience problems while accessing the Principal Toolbox, please verify security settings 9 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 the Principal Toolbox. In Internet Explorer go to *Tools > Internet Options,* select the *Security* tab and choose *custom level* to change the settings.

Section	Setting	Value	Remarks
ActiveX controls and plug-ins			
	Initialize and script ActiveX controls not marked as safe for scripting	Enable	Script errors on different pages occurs when disabled.
Downloads			
	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.
Miscellaneous			
	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 Authentication			
	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 Logging on

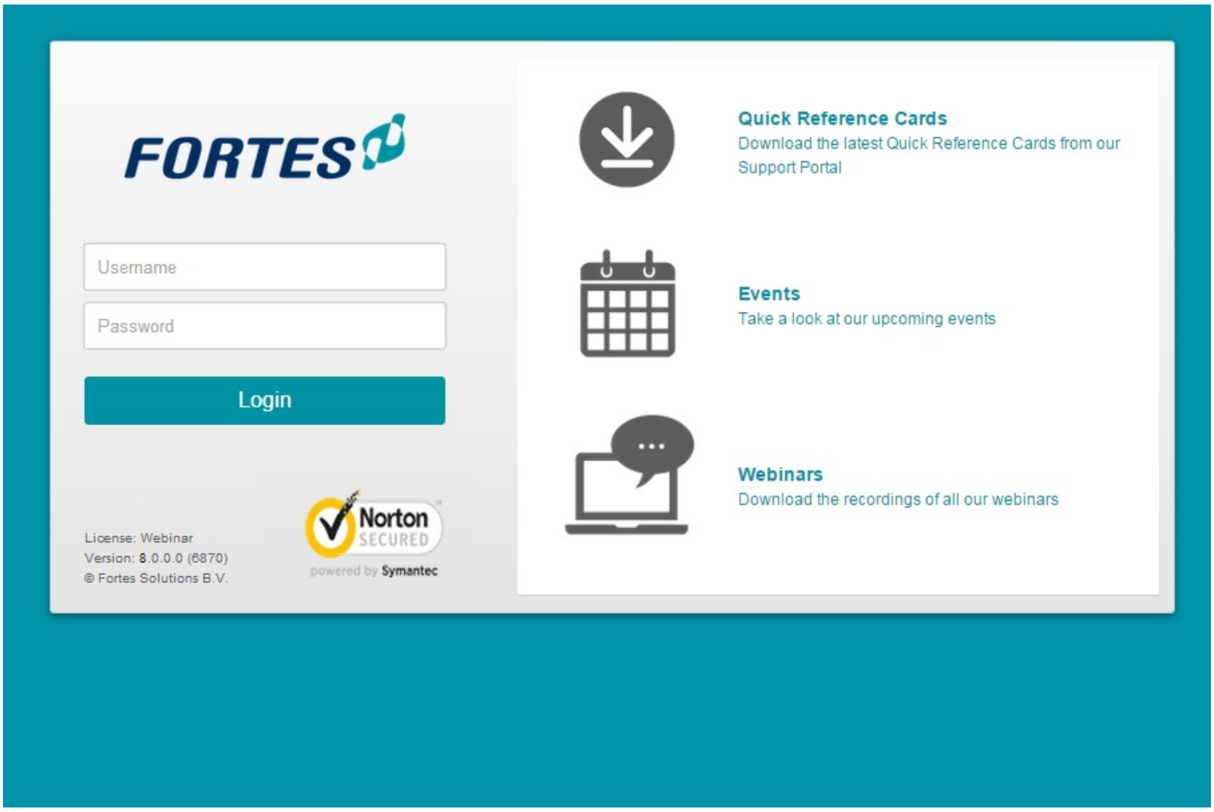
Before you can log on to the Principal Toolbox, the system administrator must first create a user name for you. After this has been done, you can log on using the following steps.

> ***Note**: Some organisations have so-called single sign-on configuration. In this case, you are logged on automatically with your organisational account.*

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.



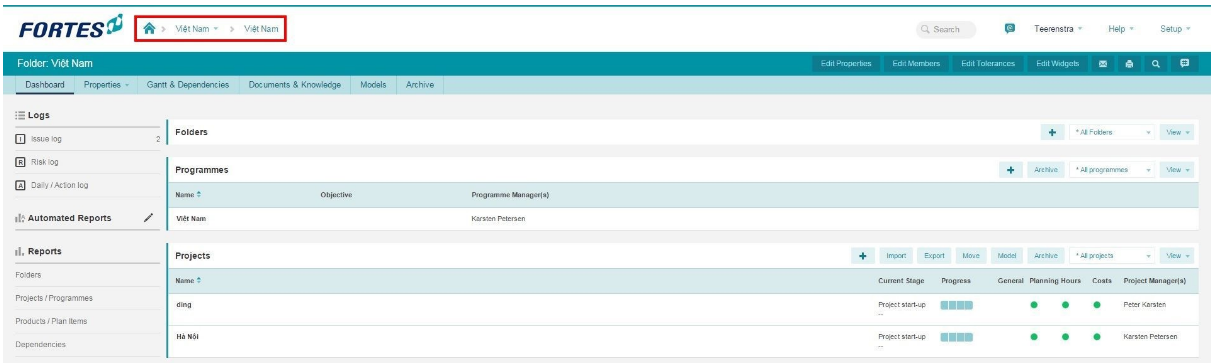
1.5 Navigation

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 6.5+ the browsers 'Back' button may be used as well.*

Navigation with organisational units:

Navigating through the Principal Toolbox is done by using the dark blue header within your browser window. **'Enterprise'** is the highest level in the hierarchy for your organisational units. From there you can navigate down the branches of the organisation tree (through the drop down menu) to locate your folders (containing sub folders, folders and projects) on the appropriate **'Project Management'** tab. On this tab select the appropriate folder to navigate through folders and projects within.



Project Dashboard; bread crumbs (Navigation with organisational units).

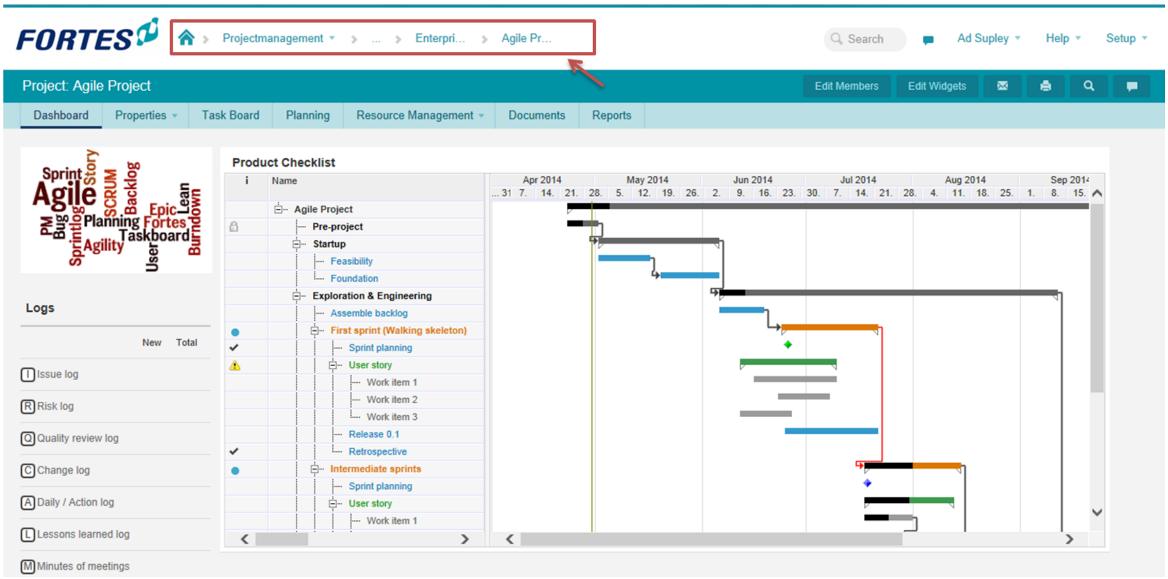
***Note:** Classic navigation is available after migration.*

Classic Navigation:

Classic navigation through the Principal Toolbox is done by using the dark blue header within your browser window. **'Enterprise'** is the highest level in the hierarchy for your organisation's organisational units, folders and project tree. From there, you can navigate down the branches of the tree (through the drop down menu) 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 organisational unit, folder and project tree. Click the bread crumbs anywhere higher up in the hierarchy to navigate to that location.

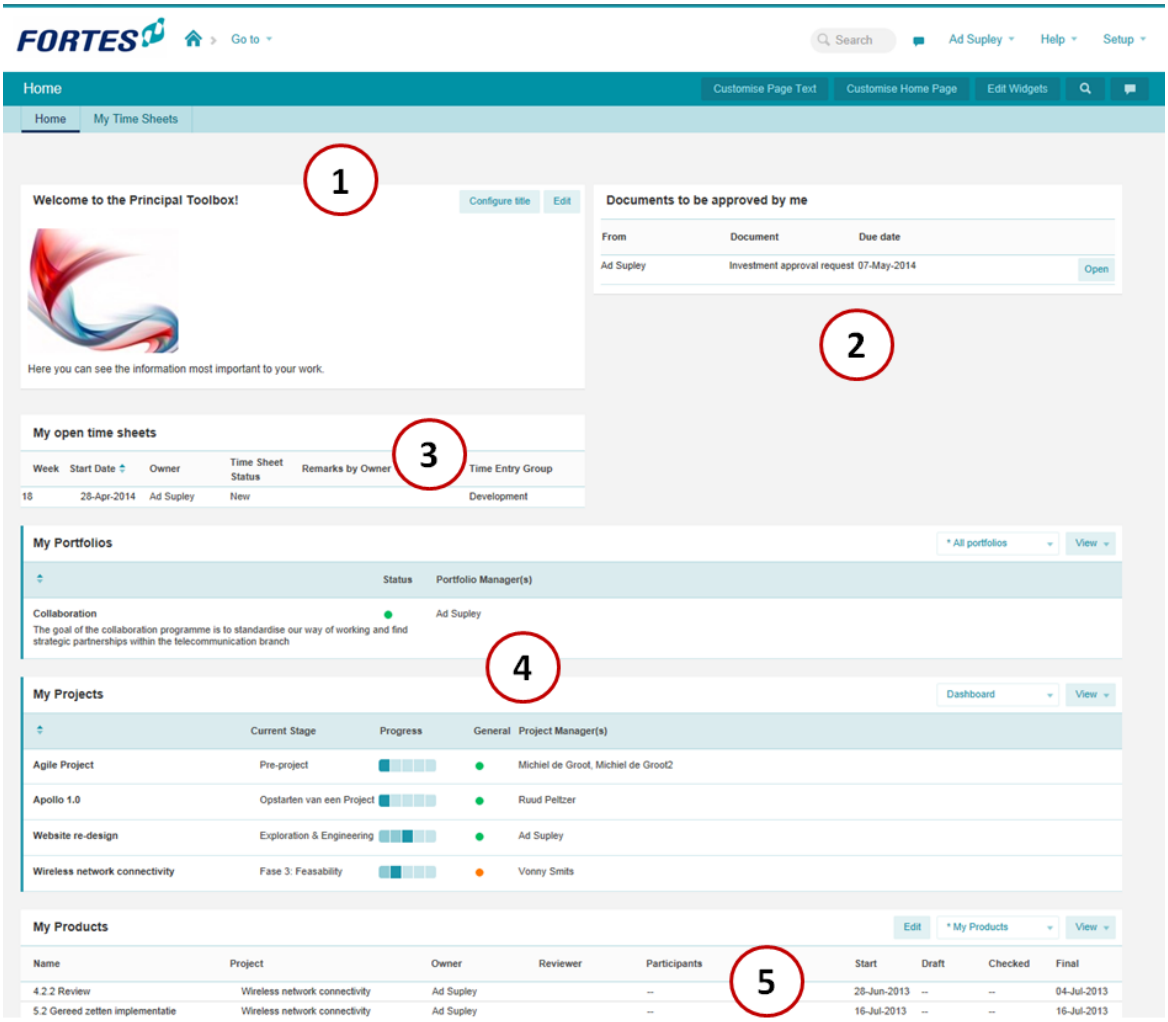


Project Dashboard; bread crumbs (Classic Navigation).

2 Basics Principal Toolbox

2.1 Home page

On the home page you are able to see all folders 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.



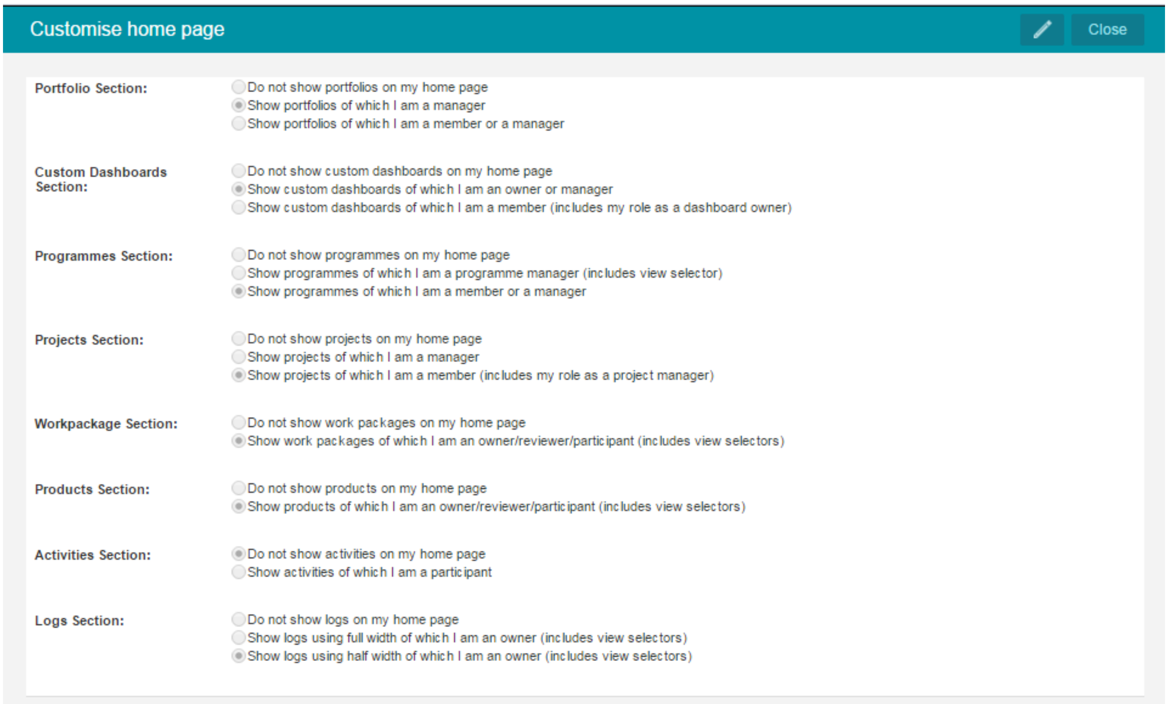
Home page

1. Area for general information and widgets.
2. Products/documents to be approved (add-on Advanced Customisation & Workflow)
3. Time sheets to be filled in and/or approved (add-on Time sheets)
4. All portfolio's (add-on), folders 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 portfolios (add-on) should be displayed.
- Which folders should be displayed.
- Which projects should be displayed.
- How to display the products.
- How to display the log items.



Editing Home page settings

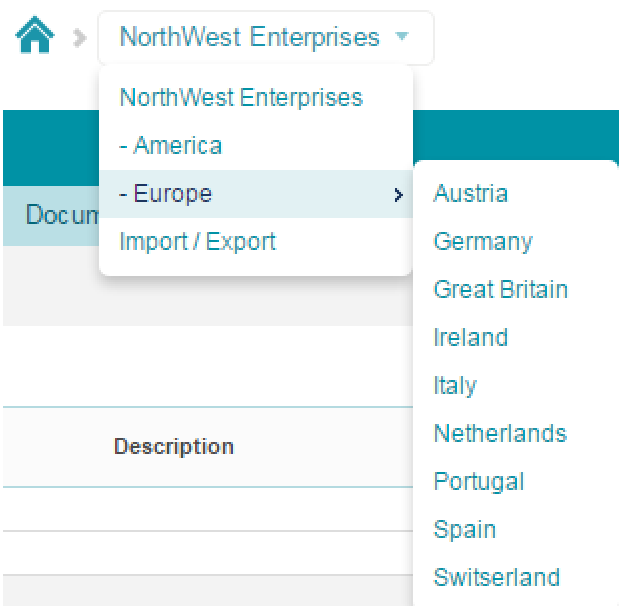
Tabs shown on your home page
Your home page displays several tabs. Depending on your organisation's license some tabs might not be available. Here you can see:

- **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 Organisational Units

Note: As of release 8.0 of the Principal Toolbox there is the possibility to use Organisational units (OU).

To edit the organisational units, navigate to your company by clicking on the header in the drop down menu.



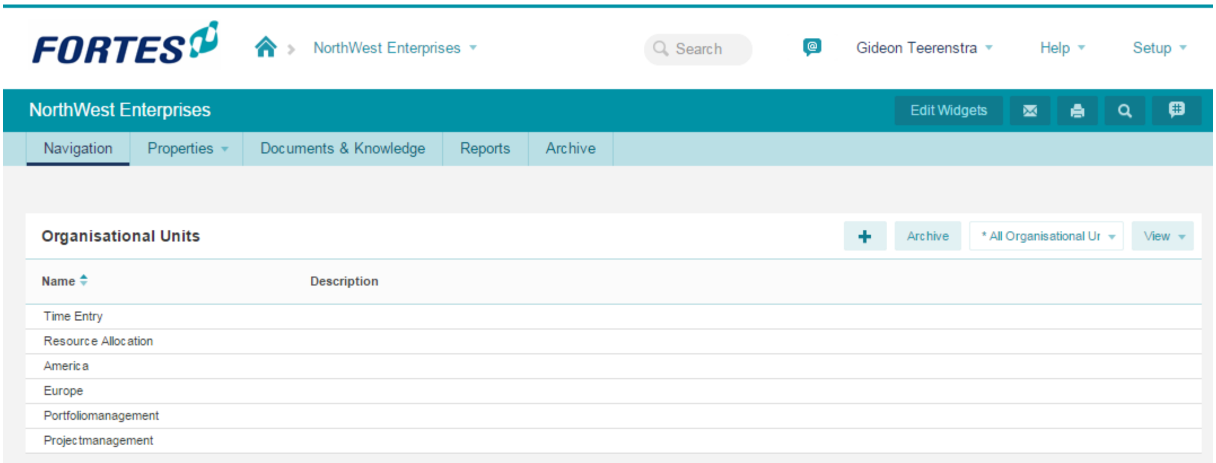
Click on your companies name to edit the organisational units.

You will now see an overview of all the organisational units.

By clicking on the button you can add an organisational unit.

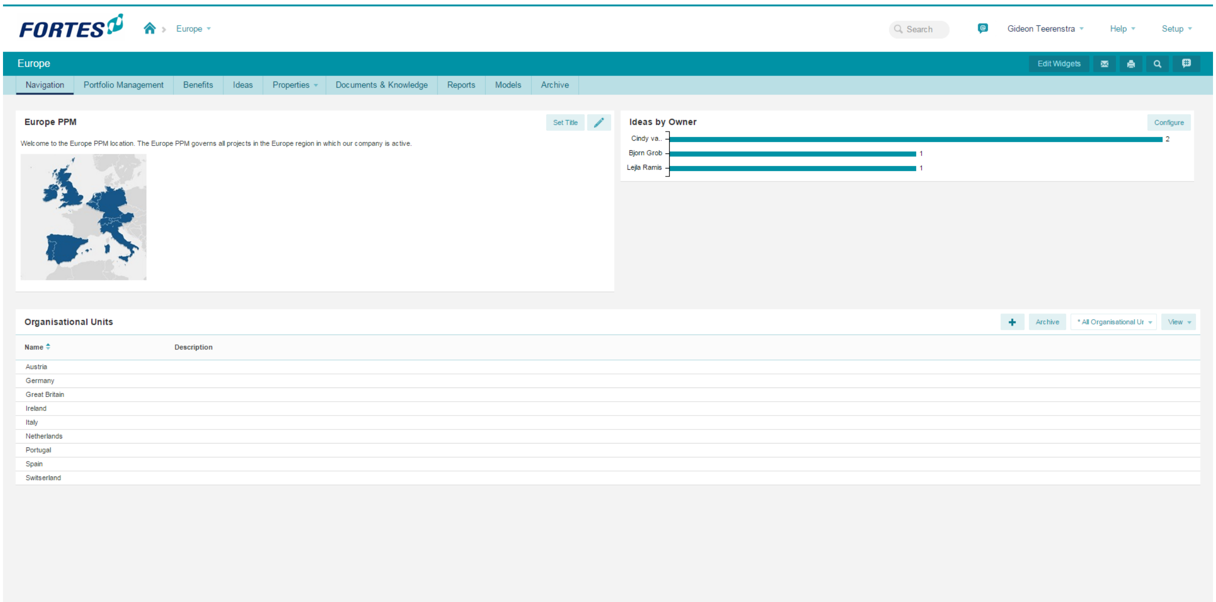
By clicking on the Archive button you can archive outdated organisational units.

You can start editing an organisational unit by clicking on it in the overview.



Overview of the organisational units

When editing the highest level of organisational units the lower level organisational units will appear. This overview shows the location of all your organisational units and has space for editable widgets. To choose the widgets that suit you best see the widgets 188 section of the manual.
Editing and archiving organisational units on this level is done identically to the higher level.

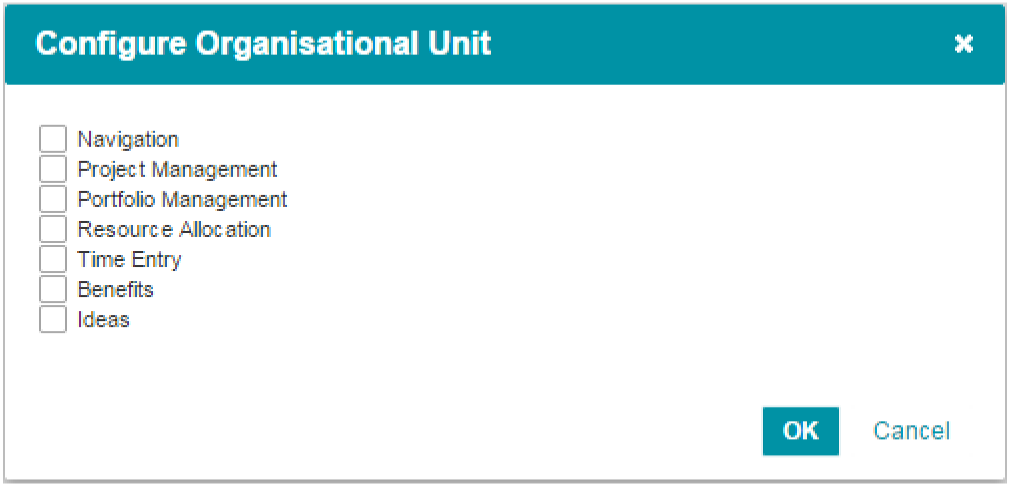


Example of an Organisational unit's dashboard on the lower level

When editing a lower level organisational unit click to edit the name or description of the organisational unit.

By clicking Configuration on the '**Properties**' tab, the configuration for this organisational unit can be edited.

For every organisational unit this configuration can be changed independently.



Configuration of the organisational unit

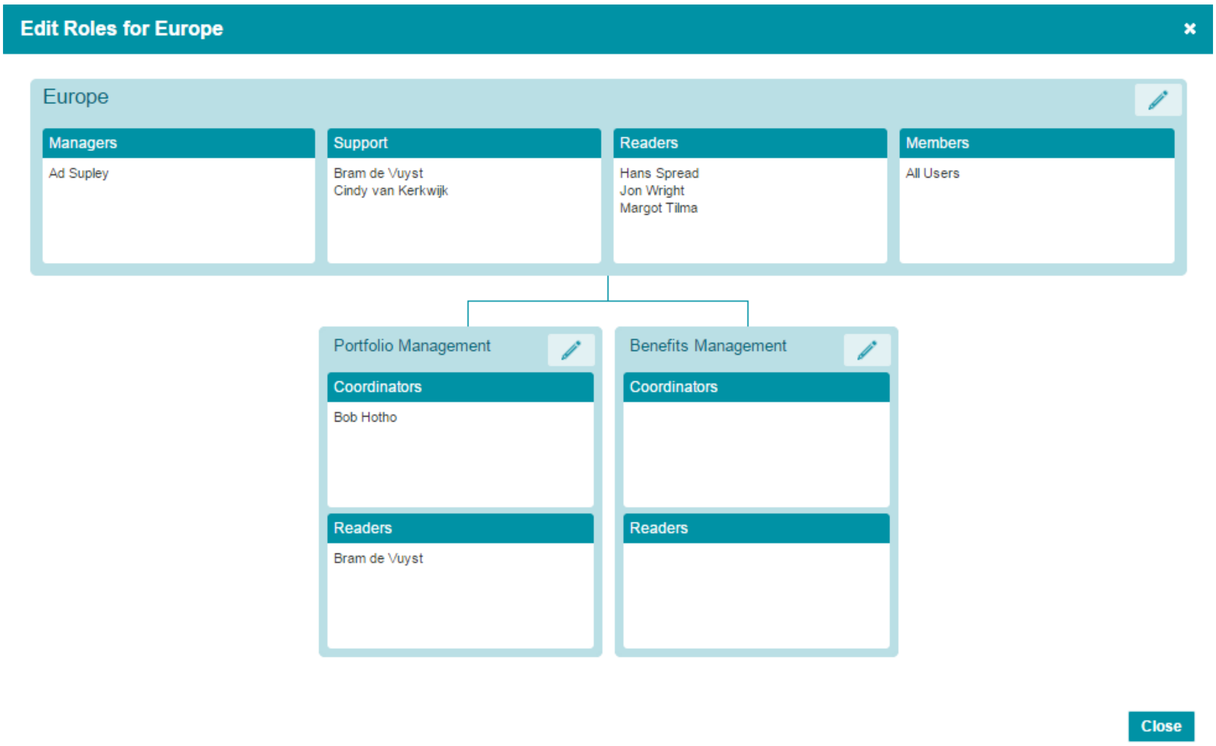
To save the changes, click OK.

Permissions and roles

Configuring roles for organisational units can be done on all levels of organisational units and can be found on the '**Properties**' tab.

There are four 'regular' roles and there are 'additional' roles.

For more information on permission and roles see the permissions and roles 22 section of the manual.

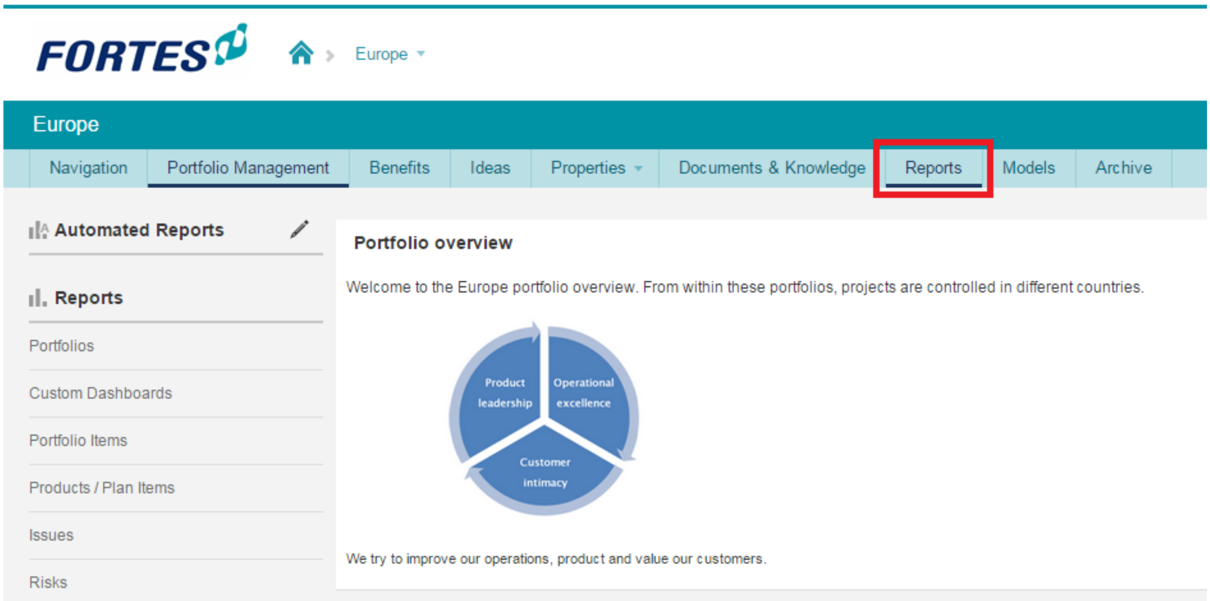


Roles on organisational unit level

Reporting on organisational units

Reports on organisational units can be found in two place which generate reports with a different scope.

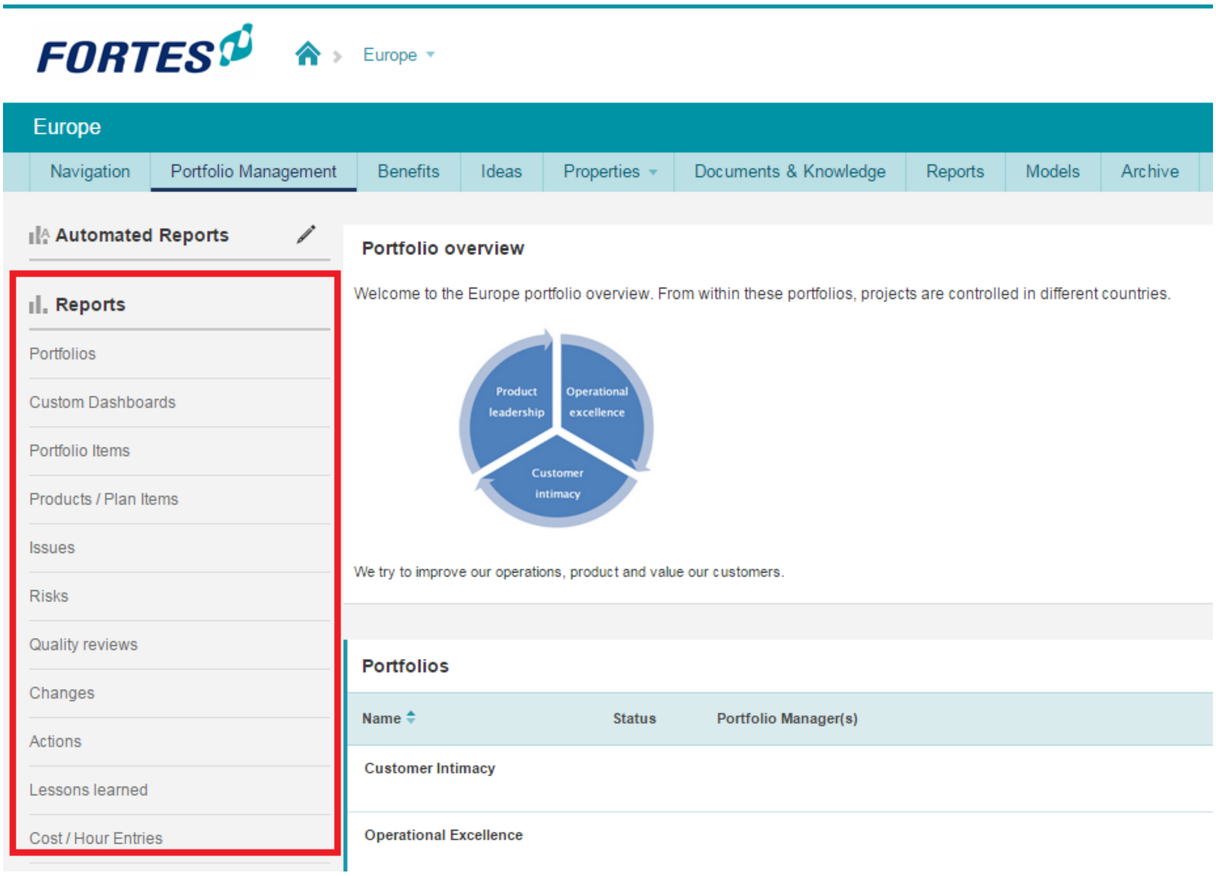
- The first option is the reports tab in the organizational unit.



The reports that report on the current level and all lower levels.

The reports generated on the reports tab for the OU include information from the current OU and all lower levels.

- The second option are the reports on local levels such as '**resource management**'.



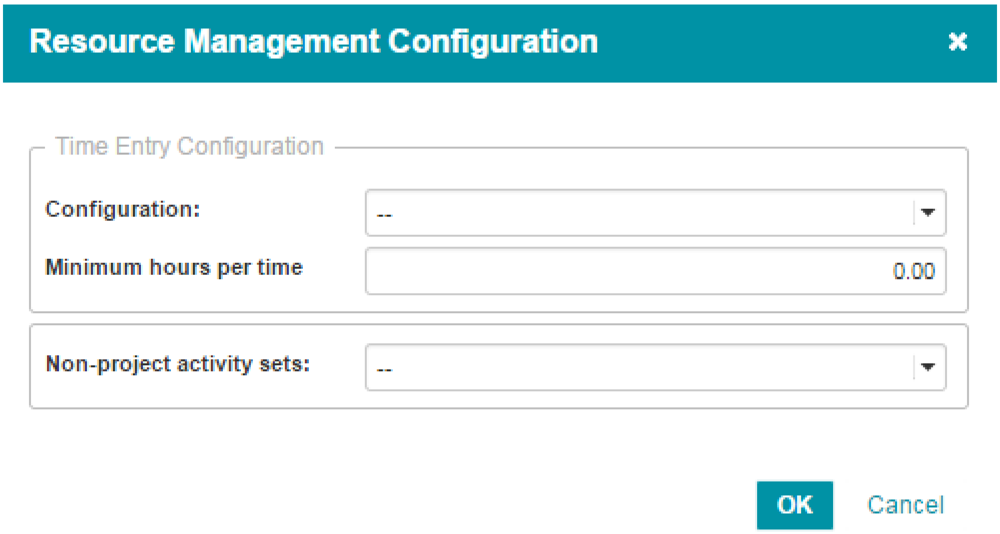
The reports that report on the current level only.

The reports generated this way will only report about the current level and functional are (e.g. portfolio management).

Resource Management Configuration

To configure resource management and/or time entry in organisational units, navigate to the resource management tab in the organisational unit.

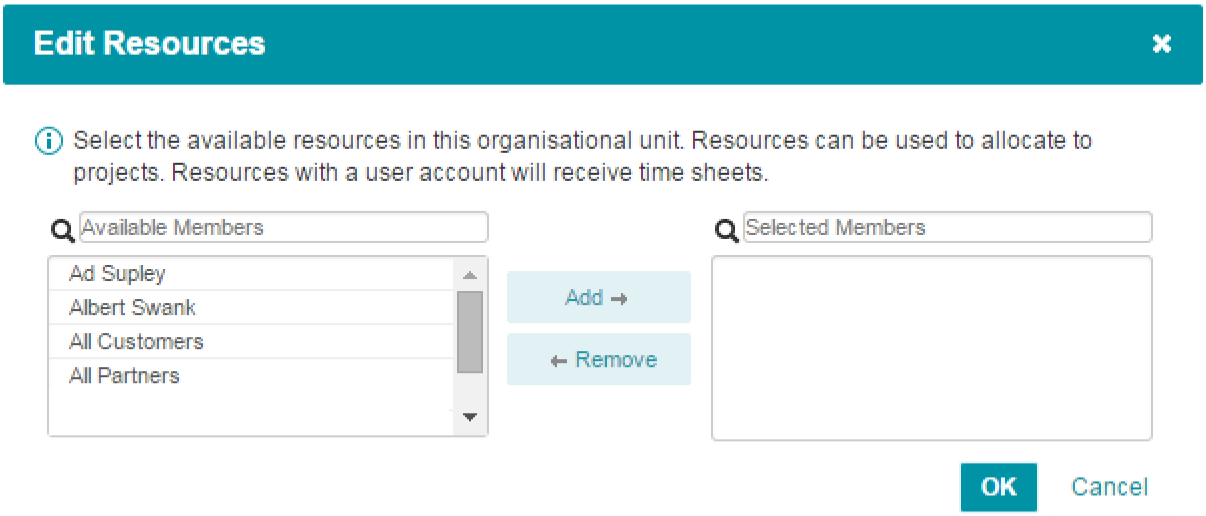
Next click Resource Management Configuration



Resource management configuration in organisational units

Select the appropriate time entry configuration and Non-project activity set to configure the resource management.

The resources can be edited in the appropriate organisational units. Click Edit Resources.



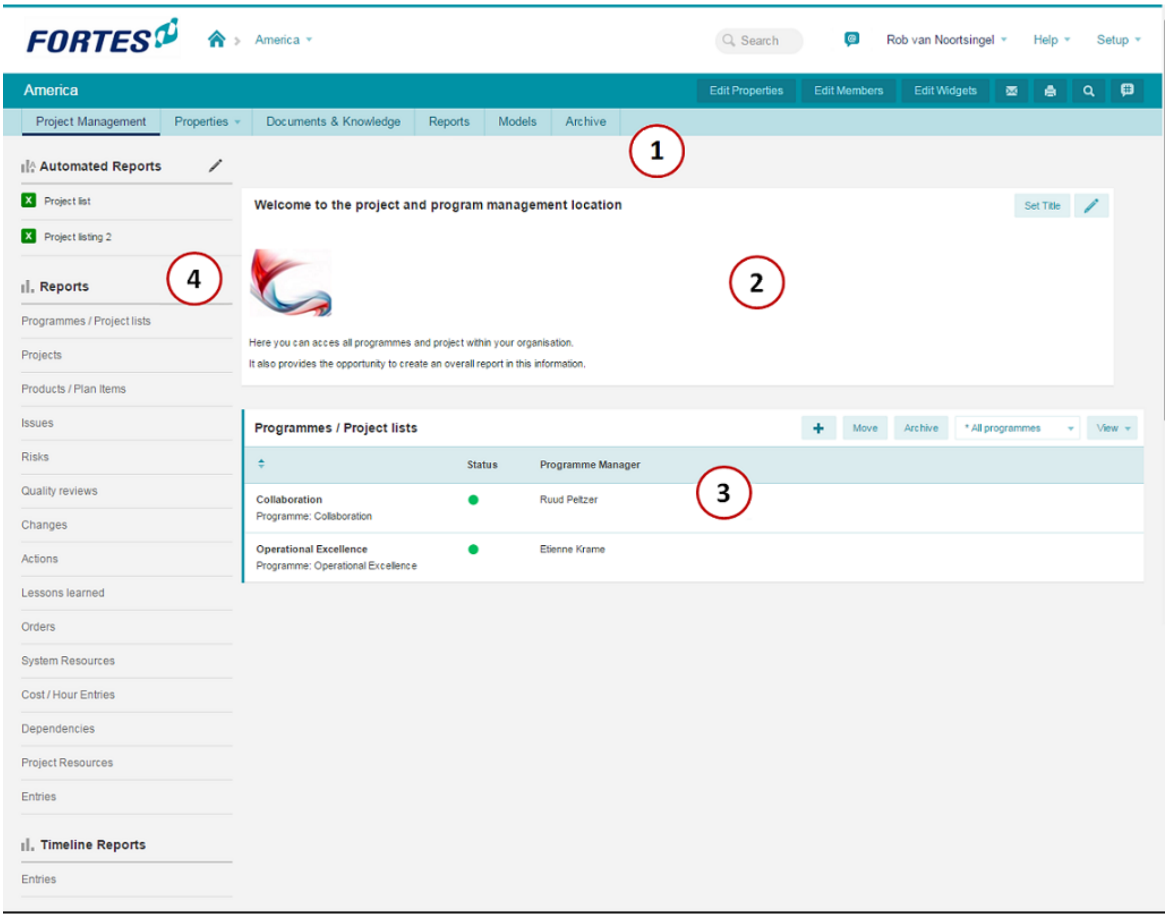
Edit resources in organisational units

Select the available resources and save by clicking OK.

2.3 Project management dashboard

The Project management dashboard is the highest level in the folder and project tree. The Project Management dashboard is accessible through the link (drop down) in the blue header.

On the Project management dashboard you are able to reach all folders within the organisation and you are able to get information regarding the progress of folders as judged by the folder manager.



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.
   - Project Management : This is the main (default) page.
   - Properties : The properties and history of the projects for this organisational unit can be found here.
   - Documents & Knowledge : A folder structure can be created here where files of any format can be stored and shared.
   - Reports : This tab shows all reports from all underlying projects (only visible when configured, see Principal Toolbox 216 configuration).
   - Models : An overview of the project models on the enterprise level.
   - Archive : Archived work areas / folders / project lists and project models on the enterprise level.

2. Area for customisation and widgets.

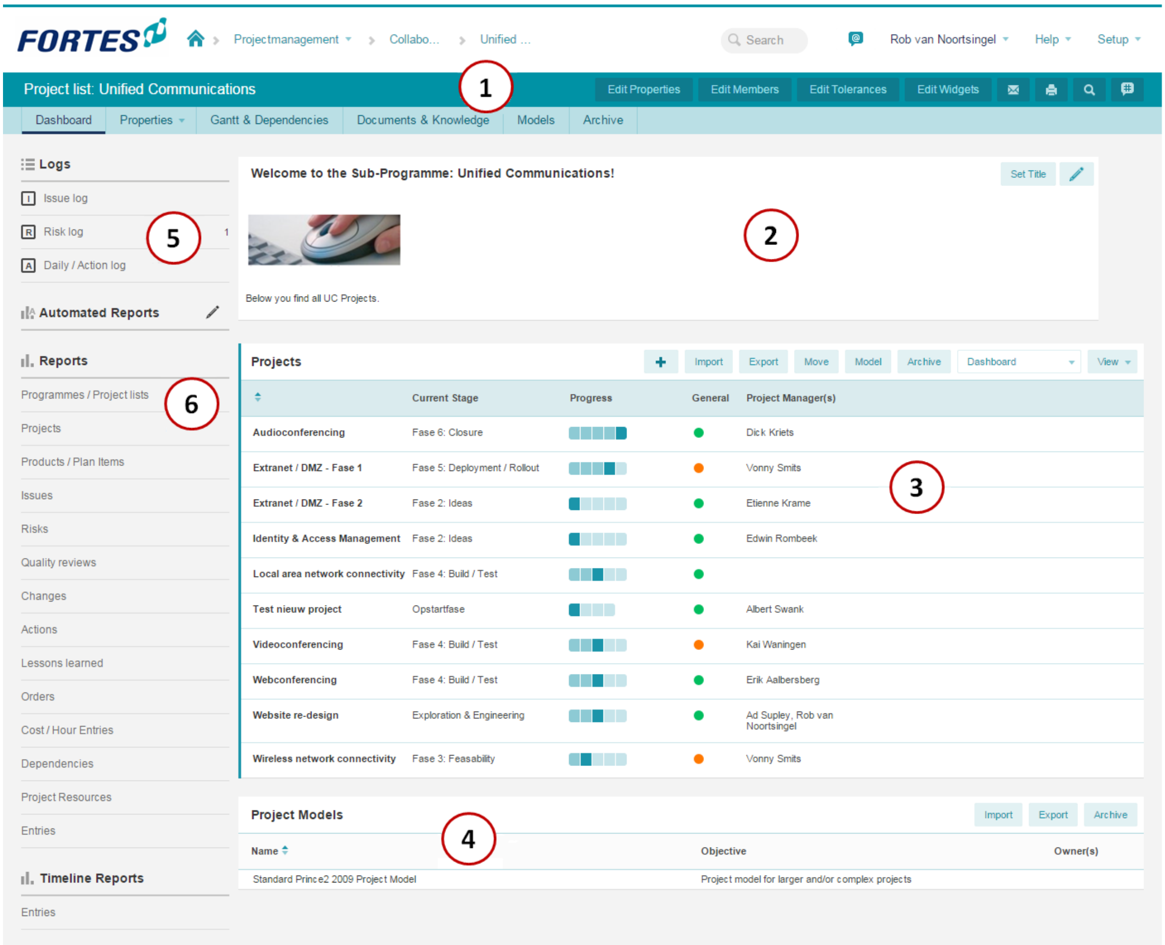
3. folder listing
   A list of all work areas / folders and project lists on this level. Shown behind each folder name is a RAG indicator which indicates the status of the folder and the manager's name.

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 folders, projects, products etc. within all project within the database.

Functions at project management level
Within the project management level, buttons are available so 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.

2.4 Folder dashboard

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



Folder dashboard

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

- Dashboard	:	The main and default page of the folder.
- Properties	:	An overview of the folder properties and history.
- Gantt & Dependencies	:	Graphical representation of all projects within the folder.
- Documents & Knowledge	:	Archive of important documents and/or useful best-practices.
- Models	:	An overview of the project models within the folder.
- Archive	:	Archived projects and project models within the folder.

Fold

2. Area for customisations and widgets.

3. List of projects (and folders when applicable)
   Gives an overview of the projects within this folder. 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 75 set by the folder manager.

4. List of available project models
   Gives an overview of the project models available within this folder.

5. Logs
   On folder 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.

6. Report
   Creation of reports/views about all projects and products within this folder.

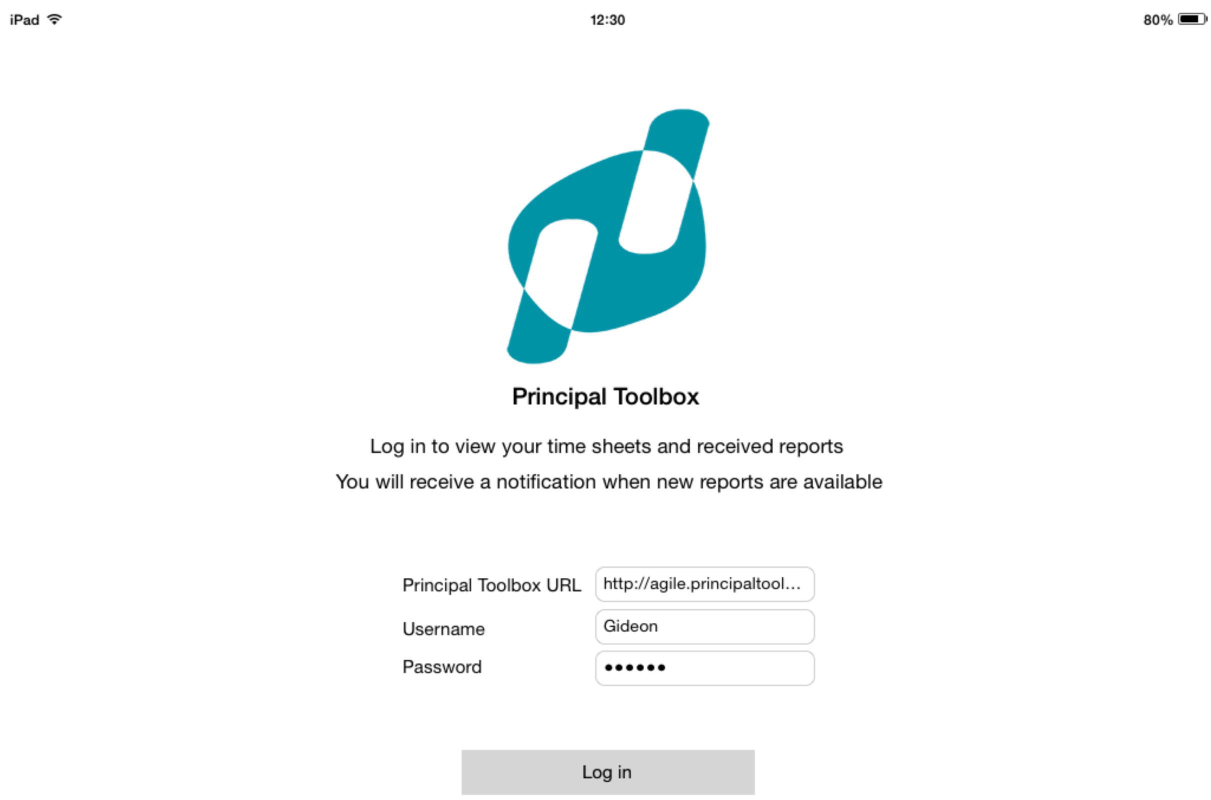
Functions at folder level
Here you can make the 'folder dashboard' available to users 22 ('**Edit members**'), change the text and the logo of the dashboard ('**Edit Properties**'), send an e-mail, print the current page, use the search function. The folder manager can also setup the tolerances 75 for the planning, hours and costs of all projects with this folder by using the **'Edit Tolerances**' button. Finally, the '**Edit Widgets**' buttons allows administrators to define the set of widgets 188 available to the folder.

2.5 Mobile Application

As of release 7.0 it is possible to use Mobile Reporting and Mobile Time Entry using the Fortes app.

They allow for managers and stakeholders to always have the appropriate reports with them and for all employees to enter hours using only their tablet or smartphone.

> ***Note**: To start using this functionality, download the app in the appstore or google play store*



Opening screen op the Fortes app

Principal Toolbox URL:	Enter the URL of your Principal Toolbox
Username:	Enter your username
Password:	Enter your password

Click 

The application can be used for Stakeholder Reporting 56 and Time Entry 133.

2.6 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.

> ***Note**: For folders and projects security-enabled locations that have no security set, ALL members of the organisational unit have access. Please keep this in mind if you do not want users to access such locations.*

Roles on organisational units

Role	Rights
Organisational unit Manager	• Create and archive folders in the organisational unit • Assign *folder manager(s)* to a new folder within the organisational unit • Assign *folder reader(s)* to a new folder within the organisational unit • Manage roles at the organisational unit level • Access information of all folders and projects within the organisational unit • Modify picture and text on organisational unit dashboard • Defining resource availability • Allocating project and non-project work • Assigning and removing Non-project Activity Sets from the organisational unit • Defining resource availability • Allocating hours against projects and non-project activities
Organisational unit Support	• *Identical access rights as the Organisational unit Manager*
Organisational unit Reader	• Access information of all folders and projects within the organisational unit • Read access to the resource management of the organisational unit • This includes read access to all allocation requests, time allocations and availability data on the applicable organisational unit
Organisational unit Member	• Can be assigned to individual portfolios as readers or managers within the organisational unit *Note: before being granted access to portfolios, users first have to be a member of Portfolio Management*

Additional roles on organisational units
All roles within portfolios, folders and projects can be configured *for individual organisational units*.

Roles on Project Management

Role	Rights
Project Management Coordinator	• Create and archive folders • Assign managers and readers to individual folders • Manage roles at all levels within the folders • Access to all folders and their underlying data • Remove and restore archived folders
Project Management Reader	• *Read access to all data within project management*

Roles on Folders

Role	Rights
Folder Manager	• Create, move and archive projects and project models on assigned level • Create, move and archive sub-folders • Remove and restore archived projects, project models on

Role	Rights
	assigned level • Assign project manager to a new project • Manage roles (managers and readers) of assigned level • Create, edit and remove issues, documents, risk's etc. within assigned level • Read all information within own and underlying levels • Set tolerances for the projects within assigned folder / project list • Modify layout of folder / project list dashboard
Folder Support	• *Identical access rights as the Manager*
Folder Reader	• Read all information within own and underlying levels

Roles on Portfolio Management

Role	Rights
Portfolio Management Coordinator	• 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*

Roles within Portfolio's

Role	Rights
Portfolio Manager	• Create and archive portfolio items • Assign managers, readers and members as owner to individual portfolio items • Access to all portfolios and their data • Create and archive portfolio items within portfolio • Remove and restore archived portfolio items • Assign a project manager when starting a project from a portfolio item • Changing the portfolio dashboard layout • Saving portfolio versions
Portfolio Reader	• *Read access to all data within the assigned level*
Portfolio Members (available as of release 7.0)	• Can be assigned to individual portfolio items as owner *Note: before being granted access to portfolios, users first have to be a member of Portfolio Management*

Roles on Portfolio Item (available as of release 7.0)

Role	Rights
Owner	• Add documents to a portfolio item • Editing all portfolio item specific and custom fields

Roles within Custom Dashboards (previously known as Portfolio Dashboards)

Role	Rights
Dashboard owner	• Can 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 manager	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 reader	Dashboard readers only have viewing access to the portfolio dashboard but cannot define additional reports.

Roles on Programmes

Role	Rights
Programme Manager	• Manage all information within own programme • Edit programme plan, planning, logs, etc. • Edit members • Set the general status of own programme • Modify lay-out programme dashboard
Programme Support	• *Identical access rights as the Manager*
Programme Reader	• Read all information within a programme • Add issues to the issue log
Programme Member	• Access assigned items within the programme • Add issues to the issue log

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 project • Add 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 / Plan Items

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.

Roles on Logs (Issues, Risks, Changes, Actions, Quality reviews)

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

Roles within Resource Management

Role	Rights
Resource Management Coordinators	Has the following rights on all Resources within all underlying organisational units: • Defining resource availability • Allocating project and non-project work
Resource Management Reader	Has the following rights on all Resources within all underlying organisational units: • Access to all resources on the underlying organisational units. • Reader access to all allocation requests, time allocations, and availability data

Roles within Benefits Management

Role	Rights
Resource Management Coordinators	Has the following rights on all Resources within all underlying organisational units: • Defining resource availability • Allocating project and non-project work
Resource Management Reader	Has the following rights on all Resources within all underlying organisational units: • Access to all resources on the underlying organisational units. • Reader access to all allocation requests, time allocations, and availability data

2.7 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.

2.8 RAG indicators (traffic lights)

On dashboards of folders and on your home page, the status of projects is shown with RAG indicators. These indicate the actual status on a folder, project, or product.

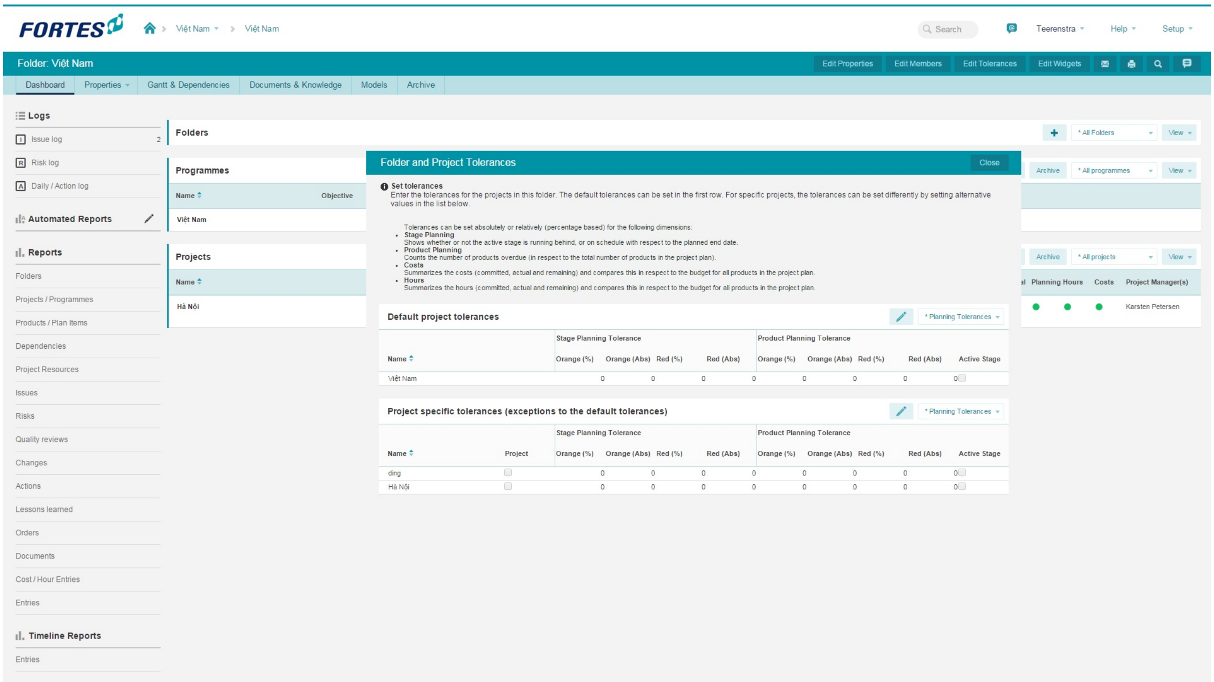
The red, amber and green indicators are used in respect to the status of the enterprise, folder, or the project.

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 folder / project list. Uses the number of products overdue.
- Cost status : Based on the tolerances of the folder / project list. Uses the deviation of expected costs from the budget.
- Hours status : Based on the tolerances of the folder / 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 folder can be defined by the folder manager at the dashboard of that level. These tolerances can be set in percentages or in absolute numbers.

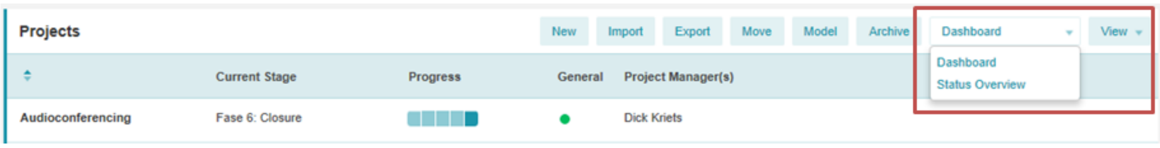


Tolerances can be set on the folder level

The use of indicators within projects is explained in the [following section](80). For setting the tolerances in a folder or project list see: [Setting tolerances](75).

2.9 Views

Throughout Principal Toolbox, views are available to present information in a tabular form. On all organisational levels (e.g. enterprise, folders, 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 [automated reports](174).



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 [Resource Allocation](152) is available within your organisation.*

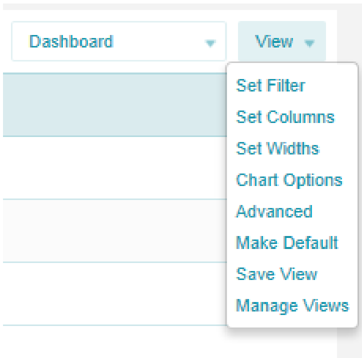
The different options in the **View Options** menu are:

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 30'.

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.



3. 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 Automated Reports 174.
   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 *Managing views.* 30

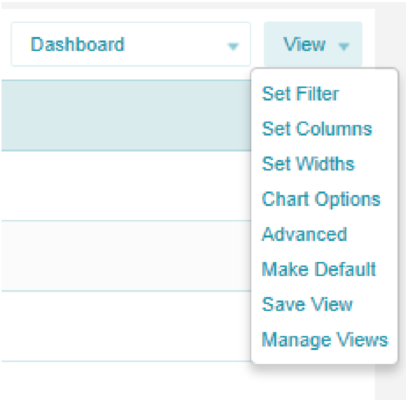
***Tip:** If you define a (new) view as standard with the ‘**Make Default**’ button, the view will be shown when opening that tab.*

2.10 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, folder), 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.

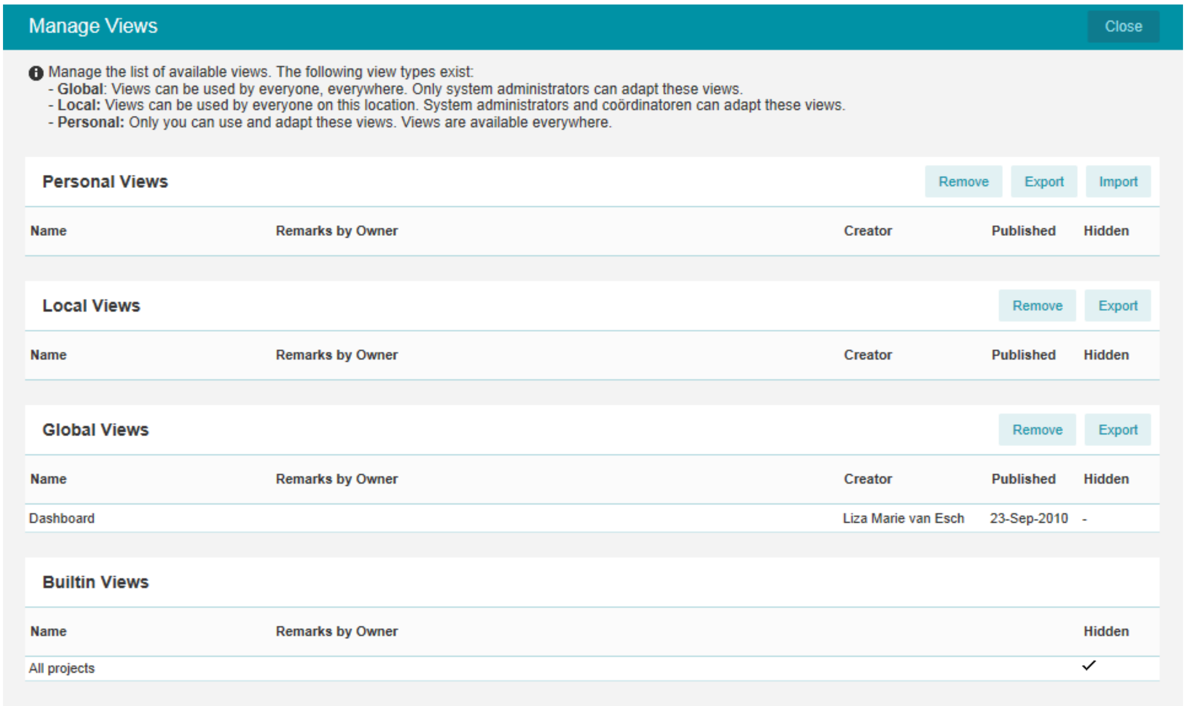


1. Go to a page where views can be defined and click **Manage Views**.

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.



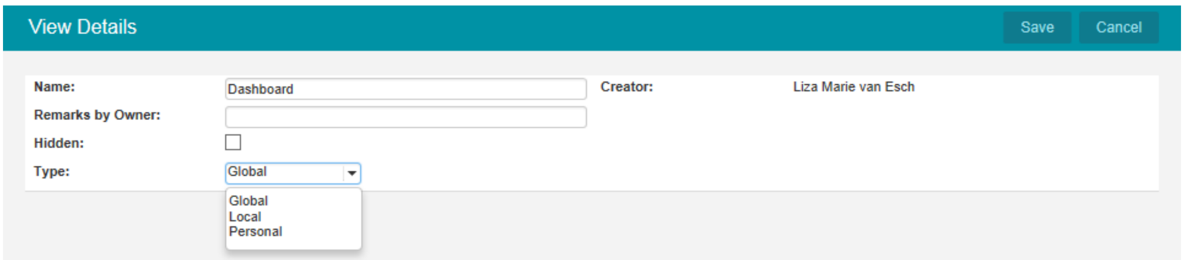
List of views

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

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

Name	:	To change the name of the view.
Remarks	:	Add remarks to the specific view.
Hidden	:	Makes a view not visible in the pull-down menu. The view is still available for the automated reports.
Type	:	Select availability for the view:

Global: view is available on all locations (all levels) and for all users.
Local: view is available on the specific location only (e.g. this project only), but for all users that have access to the location.
Personal: view is available for the current user only but on all location (all levels).



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.

2.11 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 Document management and approval 104 for more information about storing documents in Principal Toolbox.

2.12 Email function

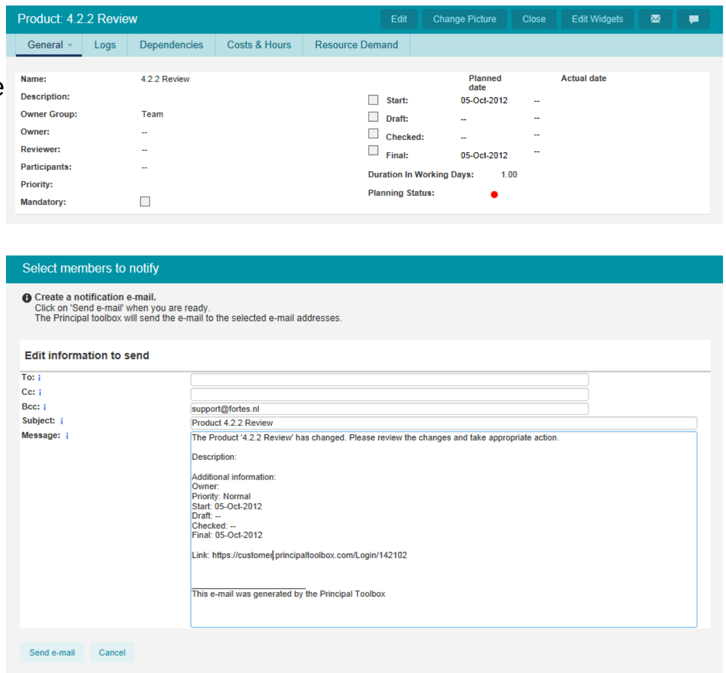
From almost any page in Principal Toolbox you can create email messages. These messages will automatically be addressed to the relevant team members, or e.g. the owner of log items etc. The message itself will contain summarised info about the page you created it from, and a hyperlink to the page in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

1. Click the email button, in the upper right hand corner of a specific page. In this example a new issue is created on the Apollo project and we want to inform the members of the new issue.

2. 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**.

3. 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).

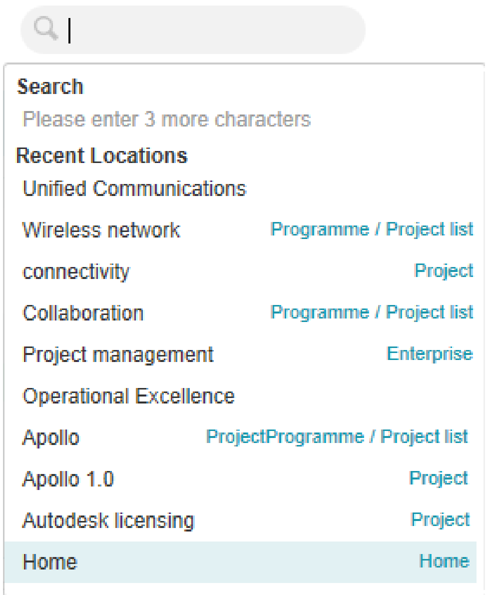
4. When finished, click **Send e-mail** and the mail is sent to the recipients.



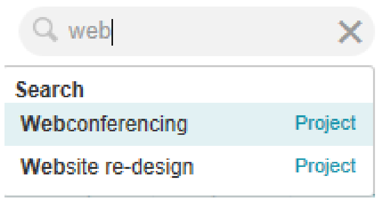
> ***Note:*** *Since the email is sent by Principal Toolbox itself, the message will not be stored by your normal email software. For this reason, you get a 'BCC' of the email message.*

2.13 Search function

Quick search
As of release 7.0, the application provides a quick search option in the header of each main page to find and navigate to items quickly. By clicking the search box, the recently navigated items are shown and a search can be performed after typing a minimum of three characters.



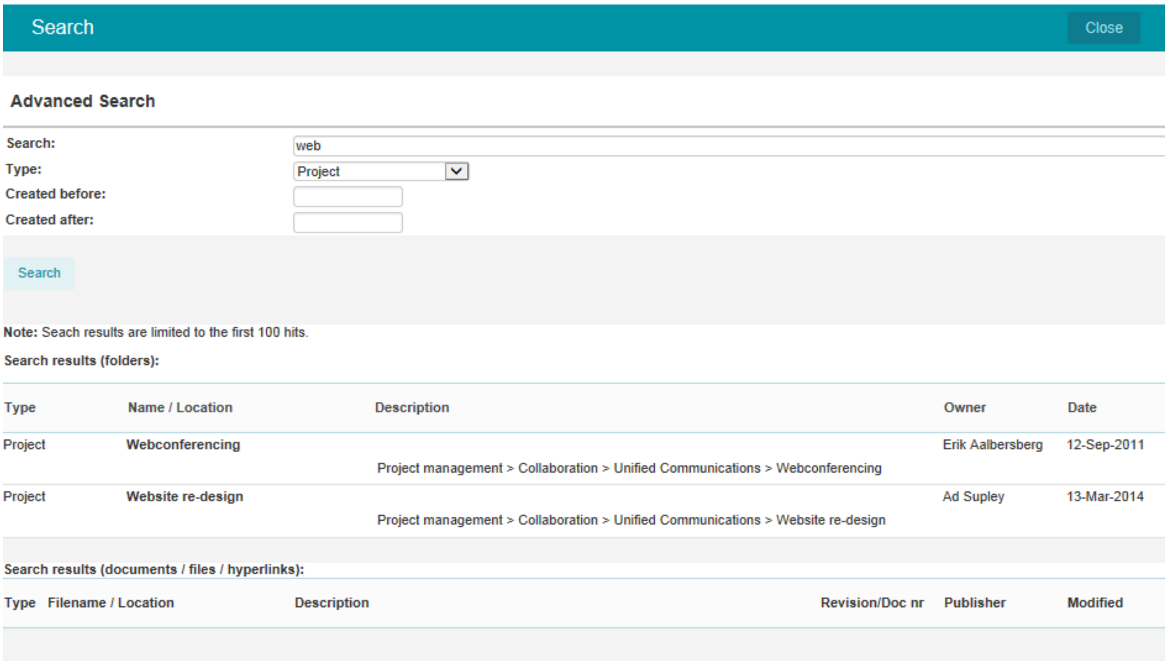
Initial search box



Search results

Advanced search
The advanced 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.



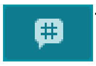
Advanced search page

2.14 Messaging

Messaging allows all users to freely inform and discuss topics related to items in the Principal Toolbox.

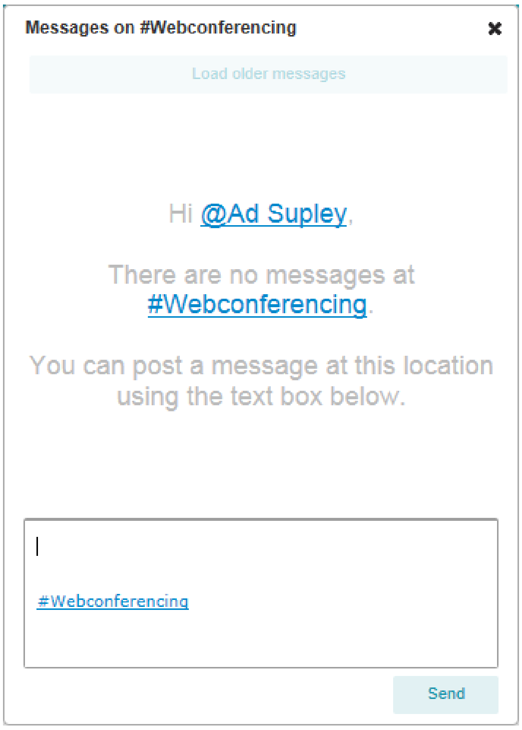
> ***Note**: This function is only available as of release 7.0 and when provided by Fortes Solutions via SaaS (or hosted).*

Two types of buttons exist

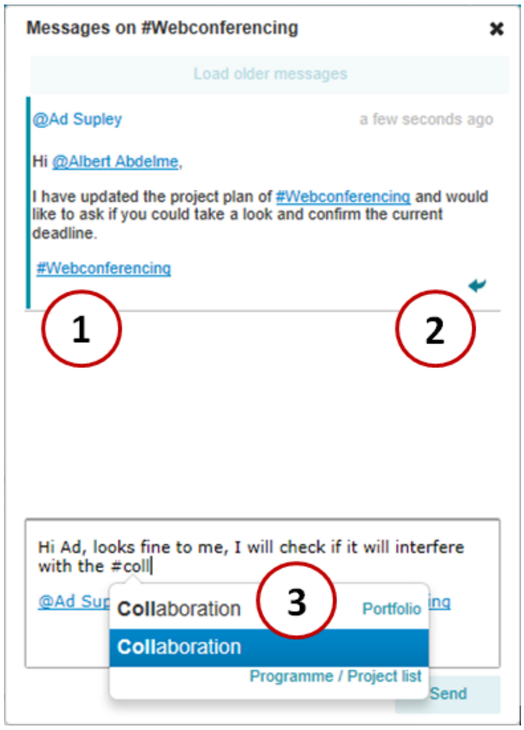

This button is shown on all locations within the Principal Toolbox and allows to send/read messages concerning that location.


This button is shown next to your person name in the header and allows to send/read messages that concern you.

On click of the button, the messaging dialog appears as shown below.



Initial message dialog



Message dialog with content

Initially, the dialog will invite you to send a message. The location to which the message will refer is already set in the message using the #-tag.

Within the messages you type, you are free to refer to other locations and persons as well using the #- and @-tags.

#	Use this tag to refer to locations within the Principal Toolbox. After typing three or more characters, the system will provide matching options. Locations are referred to by name only.
@	Use this tag to mention other persons that will see the message within their personal messaging. Persons are referred to by their name only.

Once messages are available, they are shown within the dialog (1) and the unread indication shows for a short time after the message is considered read. You are able to reply to a certain message by the message button (2) shown in the right-corner of the message. When doing so, the current message will be started with all the #- and @-tags of the original message to ensure it pops up at all appropriate locations.

If, at any location, a message is not yet read by you, a unread indication will appear:

One message is unread, open the messaging dialog to read this message.

Up to five most recent messages appear in the messaging dialog. Older messages can be viewed using the **'Load older messages'** button.

2.15 Working with models

In Principal Toolbox, many objects, e.g. projects, are based upon a model. Such a model defines the initial configuration and content for the objects that are created upon them. The way this works is comparable to templates for documents, only models contain not only templates but define configuration (behaviour) and content as well.

Models ensure that the same standards are used throughout the organisation. Multiple models may exist within a single application although it is recommended to keep the number of models limited to be able to efficiently control and maintain the way of working within the organisation.

Models currently exist for the following type of objects:

- Projects 77
- Programmes 70 (based on MSP or old Programmes)
- Portfolio's 40

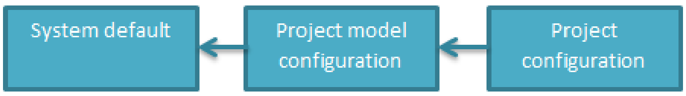
Models typically look identical to the type of object it defines, e.g. a project model looks like a normal project. The difference is its behaviour: it will not appear in reports and some functionality will not be available (e.g. a project model cannot be used to allocate resources).

A model can be created upon an instance of the object, e.g. a project model can be based upon a normal project. When doing so, the configuration and basic content is copied and stripped to the model. Typical information that remains available:

- main object structure (e.g. planning) and their naming
- templates
- configuration

Other information like owner, planning dates, issues etc. are stripped. Once created, a model can be modified just as its normal object type.

When creating an object based on a model, all information is copied and no data is stripped.



Configuration inheritance when working with models.

For configuration it works differently as depicted in the figure above. This illustrates that configuration can be made within a project but if non is set, it defaults to the project model configuration. Again, if no configuration is set on the model, it defaults to the system defaults. This works for all type of models (project, portfolio etc.).

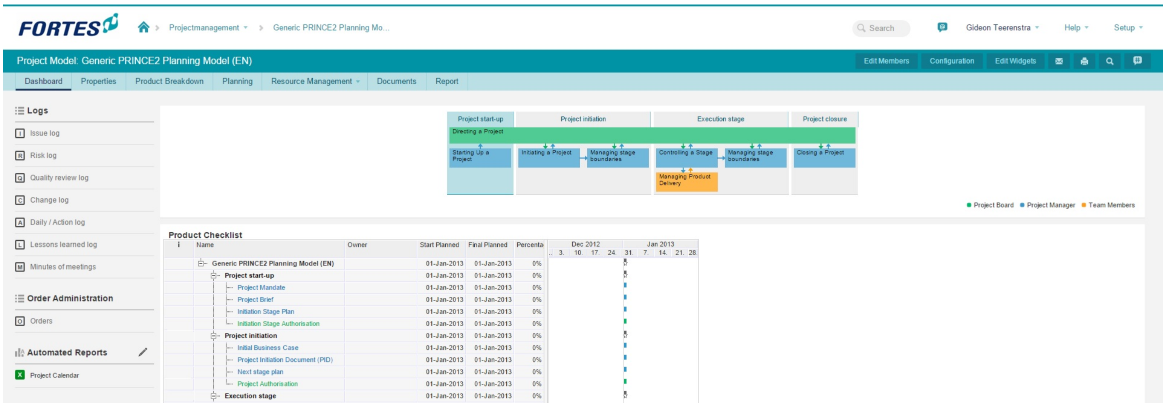
Models can be exchanged between different applications using import / export functionality.

> ***Note**: Exchanging models between applications with different version of the Principal Toolbox may result is strange or erroneous behaviour. It is best to exchange models between applications running the same version.*

If models are imported into an application on a higher version, the Principal Toolbox will update the project model version when possible.

Projects

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.



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 84) 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 129.

folders

folders are used within the Principal Toolbox for structured organisation of projects (hierarchy) in which folder Models 71 are used.

More information about the use of folder models can be found in the section folder Management 70.

Portfolio's

A portfolio model contains automated reports, pre-defined project sheets, reporting models and a financial model. It's possible to define multiple portfolio models for different portfolios. Please refer to the section about the Portfolio Model 63 for information about setting up and configuring portfolio models.

2.16 Advanced Customisation & Workflow (add-on)

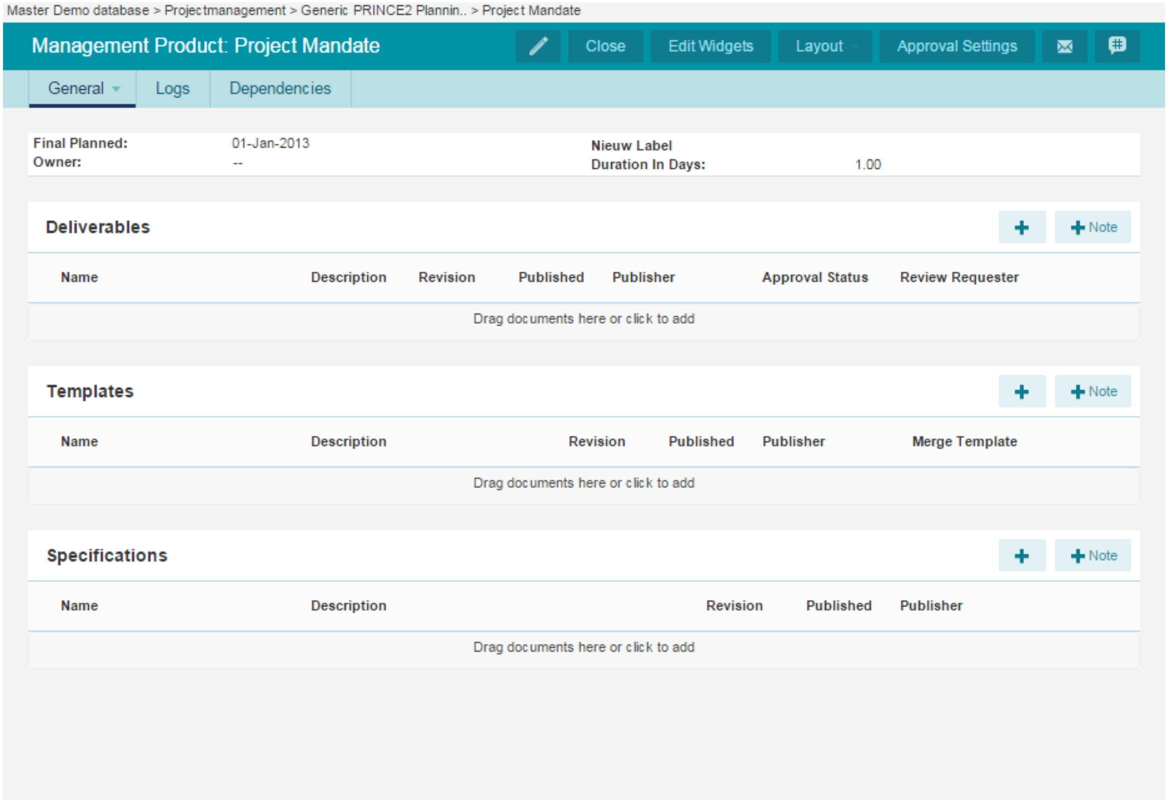
With the add-on ‘Advanced Customization & Workflow’ an organisation can define electronic forms in the different project models. These pages can be tailored to the specific needs of the organisation or folder.

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. First click "Layout" then click "Edit Layout" to define the layout of the page.

Default layout	:	Standard Principal Toolbox view;
Custom layout	:	To choose which fields are visible on the product page.

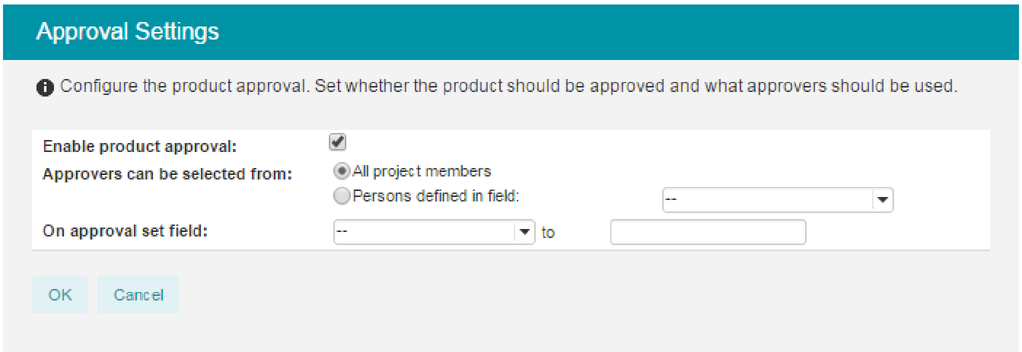


Product page

4. 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.

5. 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.

6. In this example a new page with approval cycle is defined. Click '**Approval Settings**' and check '**Enable product 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**' button.

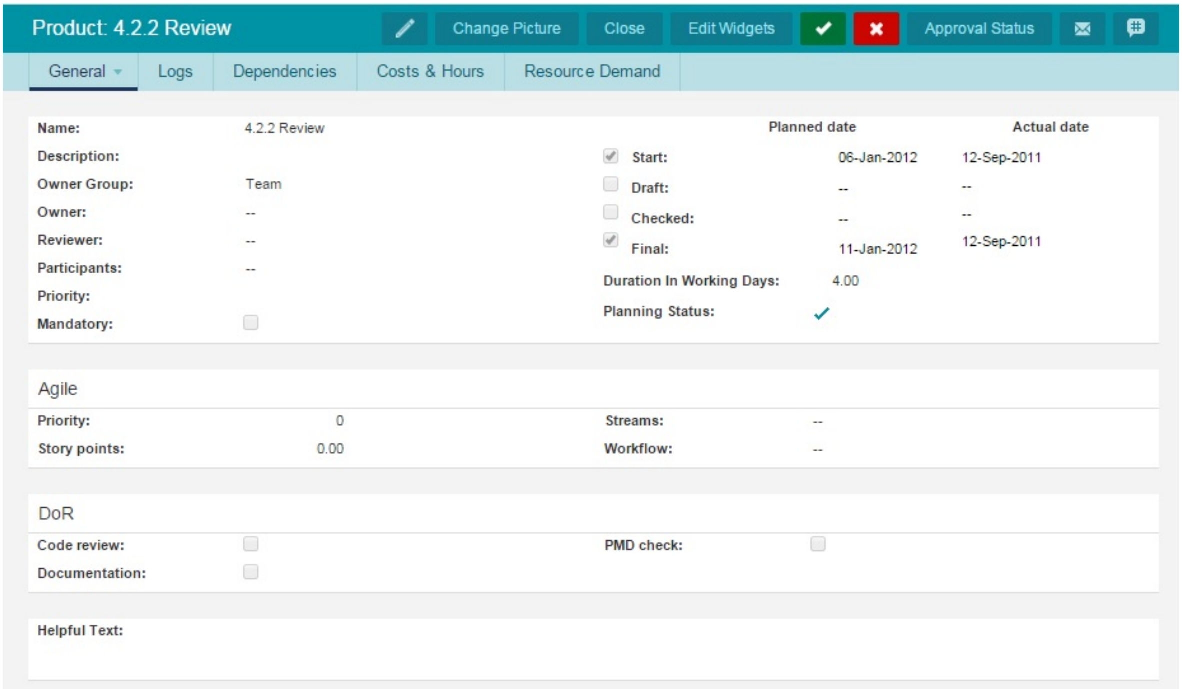
8. A new window will open where the approvers need to be selected, a due date can be set and remarks can be inserted. To send an email to the approver(s) about this product approval, tick **'Notify approvers**'.

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

Products / Plan Items to be approved by me

Location	Project	Due Date	Remarks by Owner
4.2.2 Review	Audioconferencing	--	

10. To review the product page click the product name and the specific 'Product' page opens.



Approve or disapprove the product

11. After review click '✔' or '✖' and insert any remarks.

3 Portfolio Management (add-on)

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

Various portfolio's can be created, in order to get meaningful collections of related folders 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 46
- Administering portfolios 49
- Managing portfolios 52
- Creating a portfolio model 63

These subjects will be covered in the sections below.

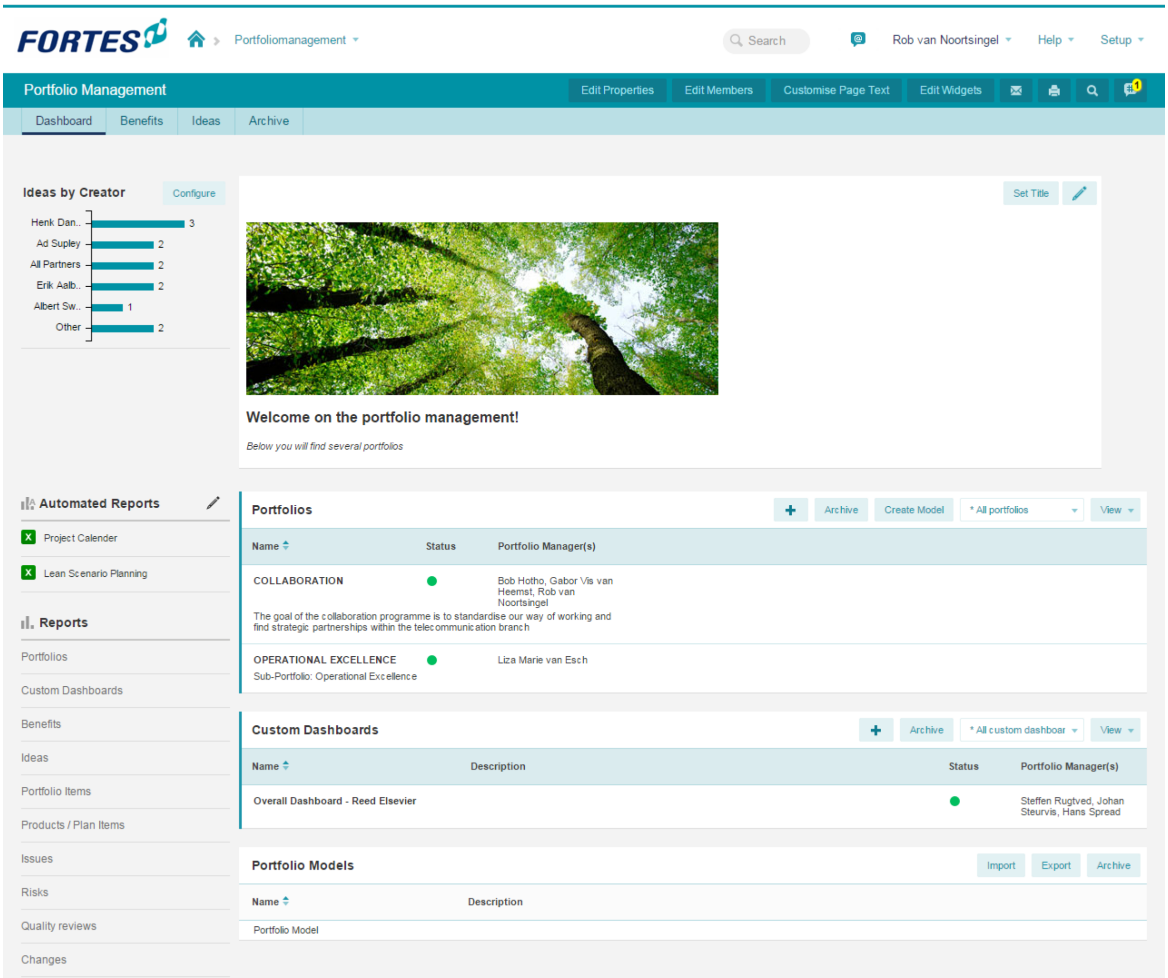
3.1 Registering ideas

As of release 7.0 it is possible to register ideas within portfolio management.

> ***Note***: *As of release 8.0 ideas are registered per individual organisational unit.*

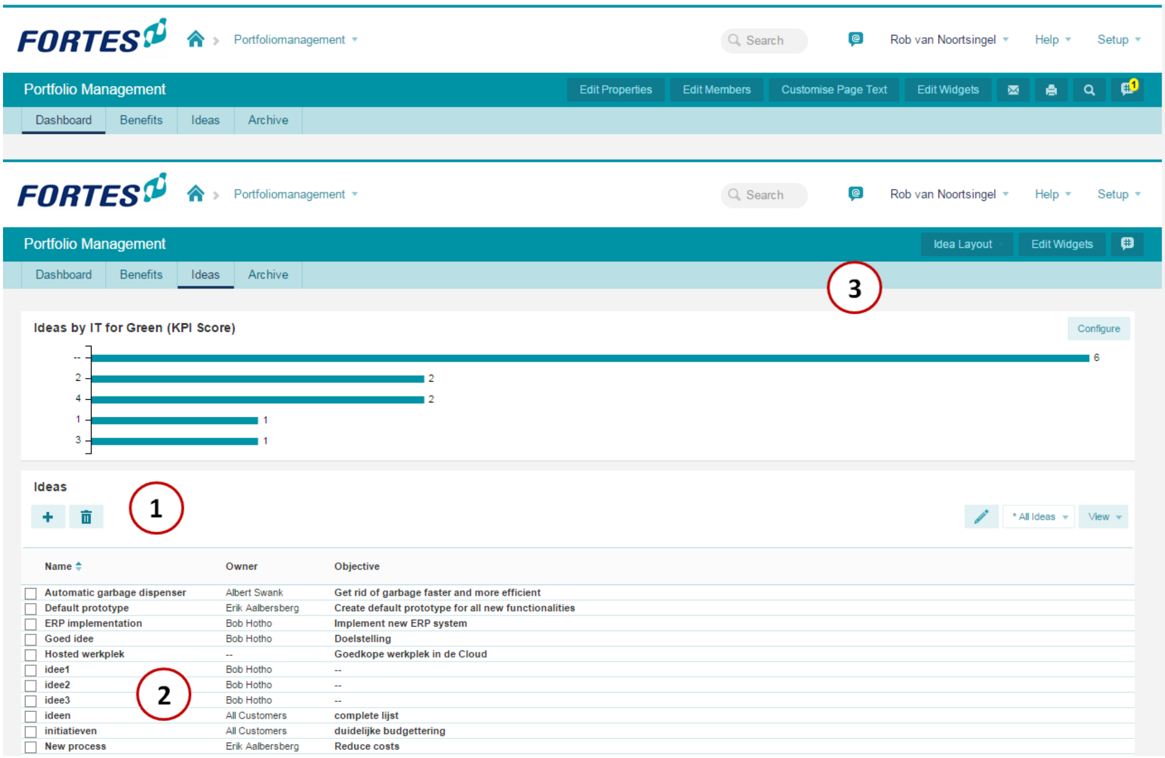
The ideas allow to collect any idea for projects, possibly contributing to benefits 59, without the need of starting an initiative within a portfolio. By doing so, selections and appreciations can be performed before starting an initiative.

> ***Note***: *Ideas share the same (custom) fields as portfolio items and projects. Additionally, ideas have an owner who is allowed to edit, extend the idea information.*



Indication of ideas on portfolio management dashboard

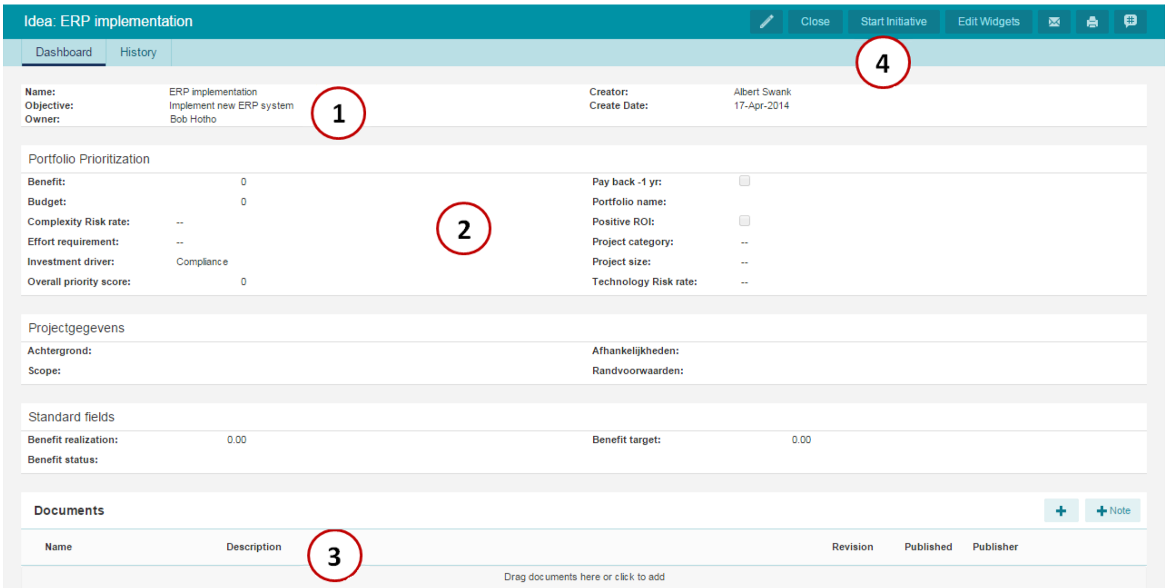
By clicking the ideas widget or the new tab (**Ideas**) the page refreshes to the list of ideas.



List of ideas

Ideas can be added, removed (1) and edited (2) as is common within the Principal Toolbox.

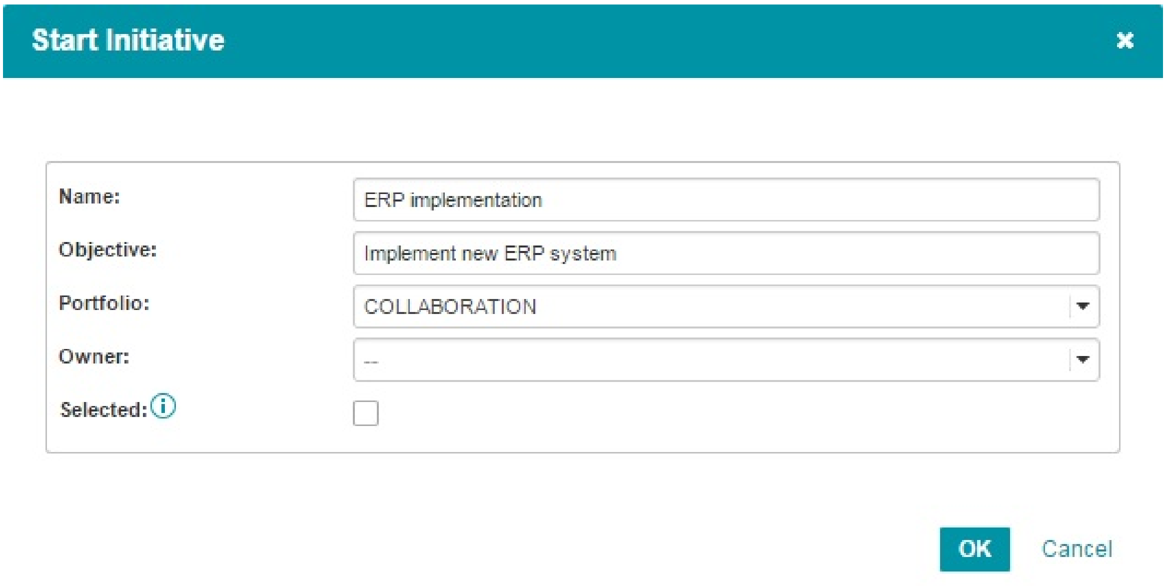
By clicking an idea, the details are opened and can be edited. The page layout of the ideas is set by using the page layout editor (3) in the same way as defining a project sheet 63 (available to managers and administrators only).



Detail page of ideas

Within the detail page, default (1) and custom (2) fields can be edited as well as documents added or removed (3).

Once an idea is approved (procedure to be defined within the organisation), an initiative can be started within a portfolio.



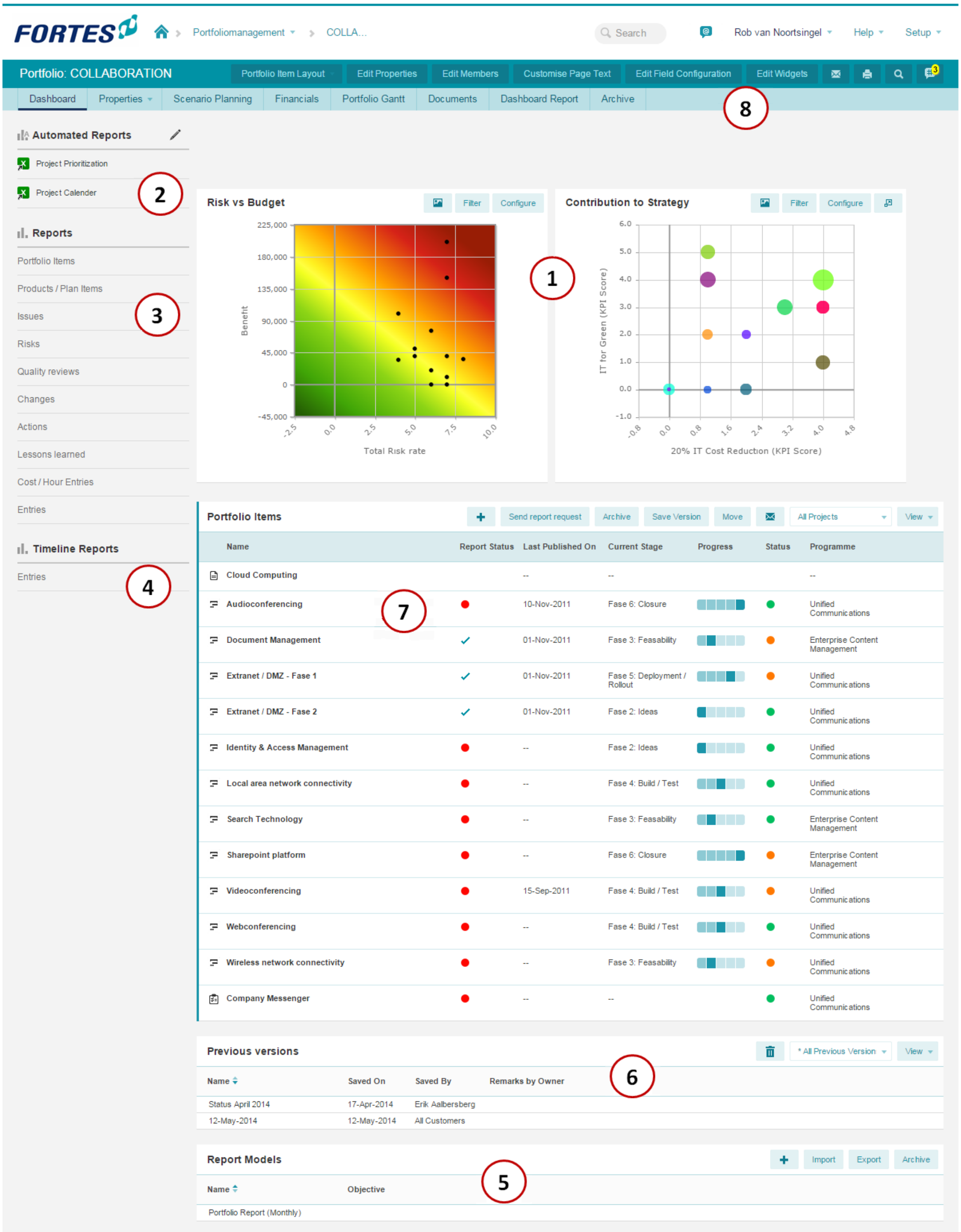
Start initiative based on idea within a portfolio

On starting the initiative, information from the idea is copied to the initiative (excluding documents). The idea itself does not change and remains available.

3.2 Working with portfolios

3.2.1 Portfolio overview

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



Portfolio Dashboard

1. Customisation area for widgets
   This section displays overall portfolio information based on widgets. The information can be altered by the administrator and configured by the portfolio manager by using the '**Edit Widgets**' button.

2. Automated Reports
   Displays a list of the Automated Reports 174 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
   This list contains the portfolio items and 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	: lists all the basic information of the Portfolio, including any custom fields.
Financials	: the financial overview tab displays the entered budgets, actual costs and the forecast.
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 archive.

Portfolio functions
A large number of actions can be performed on the 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 and portfolio item.

Project Layout	: edit the page layout of portfolio items, letting the portfolio manager determine what fields are important and how to display them.
Edit Widgets	: Add and edit widgets on your portfolio dashboard.

3.2.2 New portfolios

3.2.2.1 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

1. 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 **+** 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 listing

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

3.2.2.2 Portfolio items

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

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

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

A portfolio item can be used to store management information like the budget, information about resources, planning information, and the goals of the project. How to create a portfolio item is explained in this section: Creating portfolio items 47.

Each type of portfolio item has its own icon:

Initiative: 

Single Sheet Project: 

Project / Programme:

3.2.2.3 Creating portfolio items

***Note:** As of release 8.0 it is possible to start projects on a selected date.*

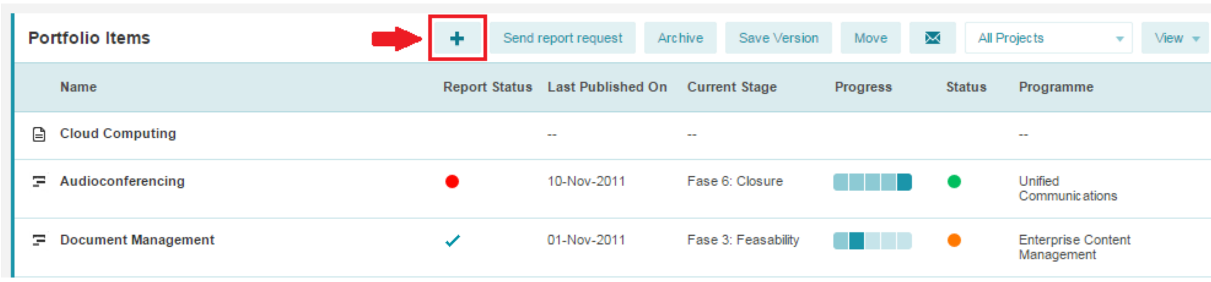
From inside a portfolio, new Ideas, Single Sheet Projects and regular Projects can be created which become part of that portfolio. A regular Project that is created and started from a Portfolio will automatically appear as a project on the Project Management side of the Principal Toolbox. However, a 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' 49.

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 **+** to create a new entry in the portfolio.



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 Modifying the project reference 49.*

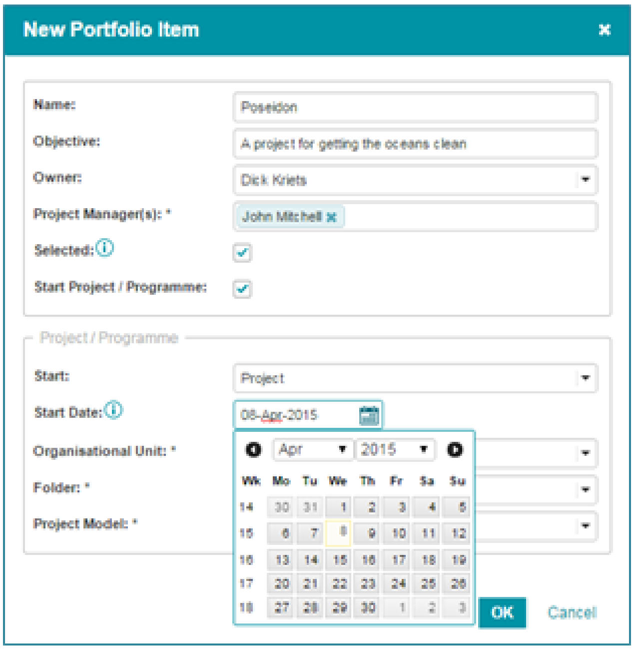
Starting a Project when creating an Initiative

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 folder the new project will be made part of.

3. Select a start date for the project.

4. 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.



Starting a new portfolio item (and 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 folder 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 folder 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.*

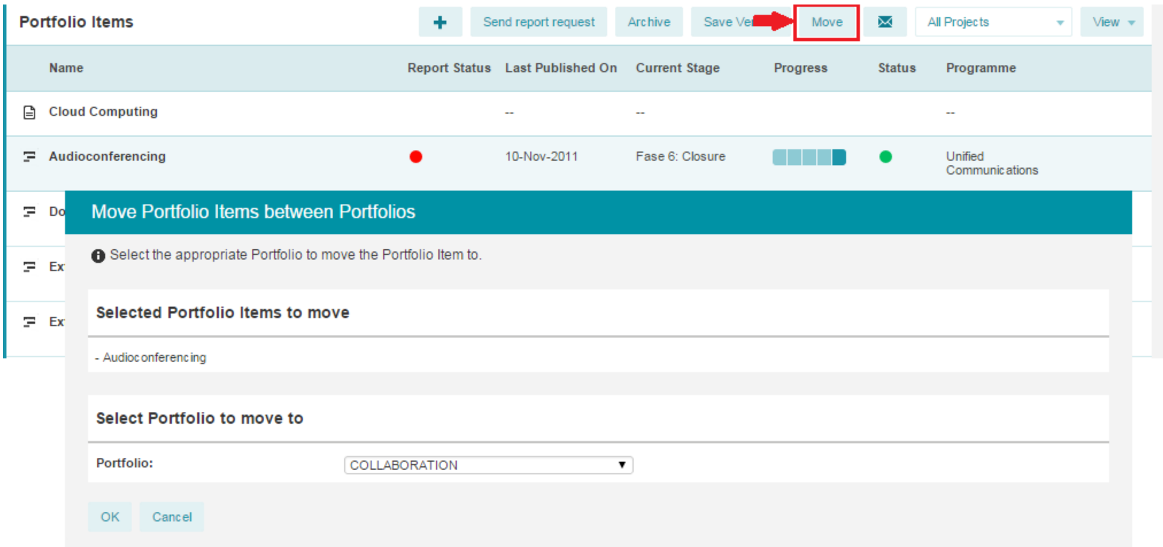
3.2.3 Portfolio administration

3.2.3.1 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.



Moving a portfolio item

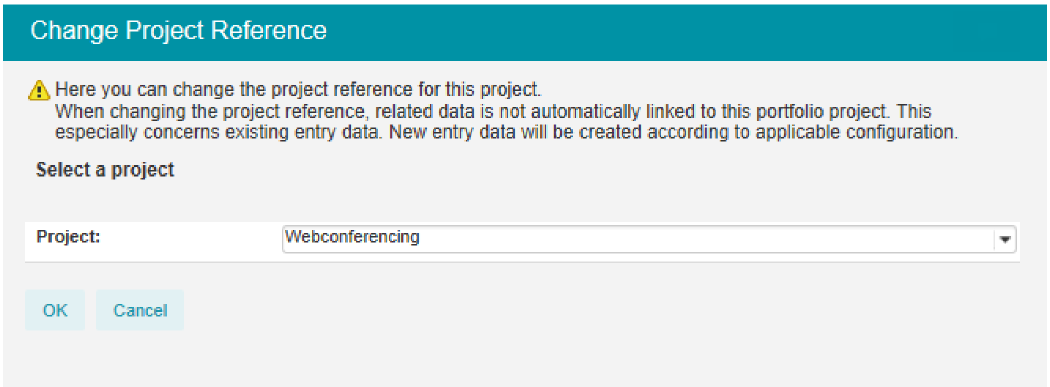
3.2.3.2 Modifying the project reference

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

1. Open the portfolio item (initiative) and click on the button **'Edit Project Reference'**

2. Select the project that the portfolio item needs to be linked by typing the first few characters and choosing the correct one

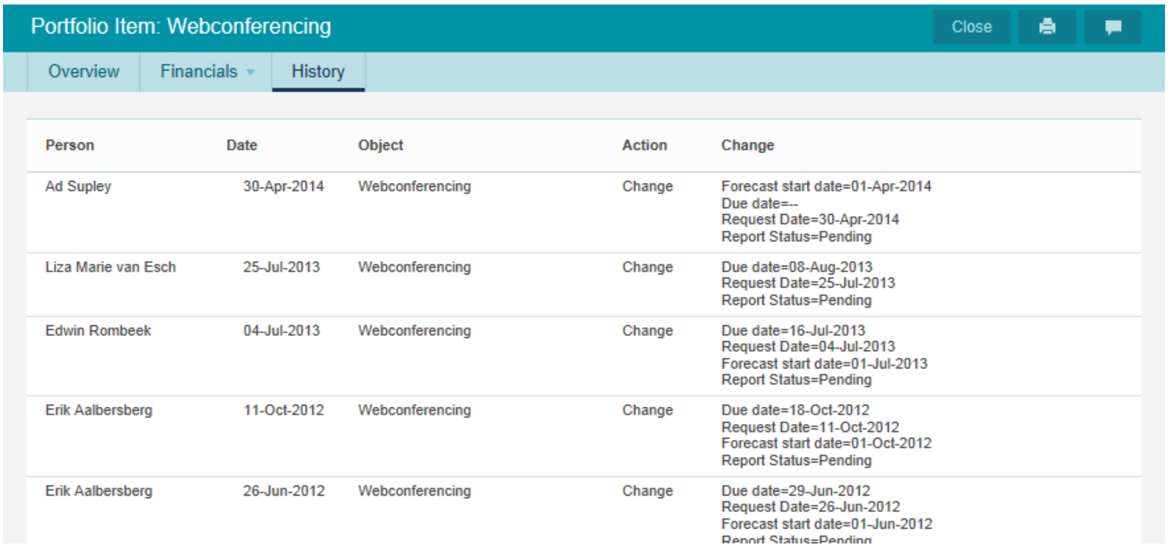
3. Click '**OK**' to establish the link



Editing the project reference

3.2.3.3 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.



History Tab on a portfolio item

3.2.3.4 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.

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 Document management and approval 104.

3.2.3.5 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.

3.2.3.6 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.

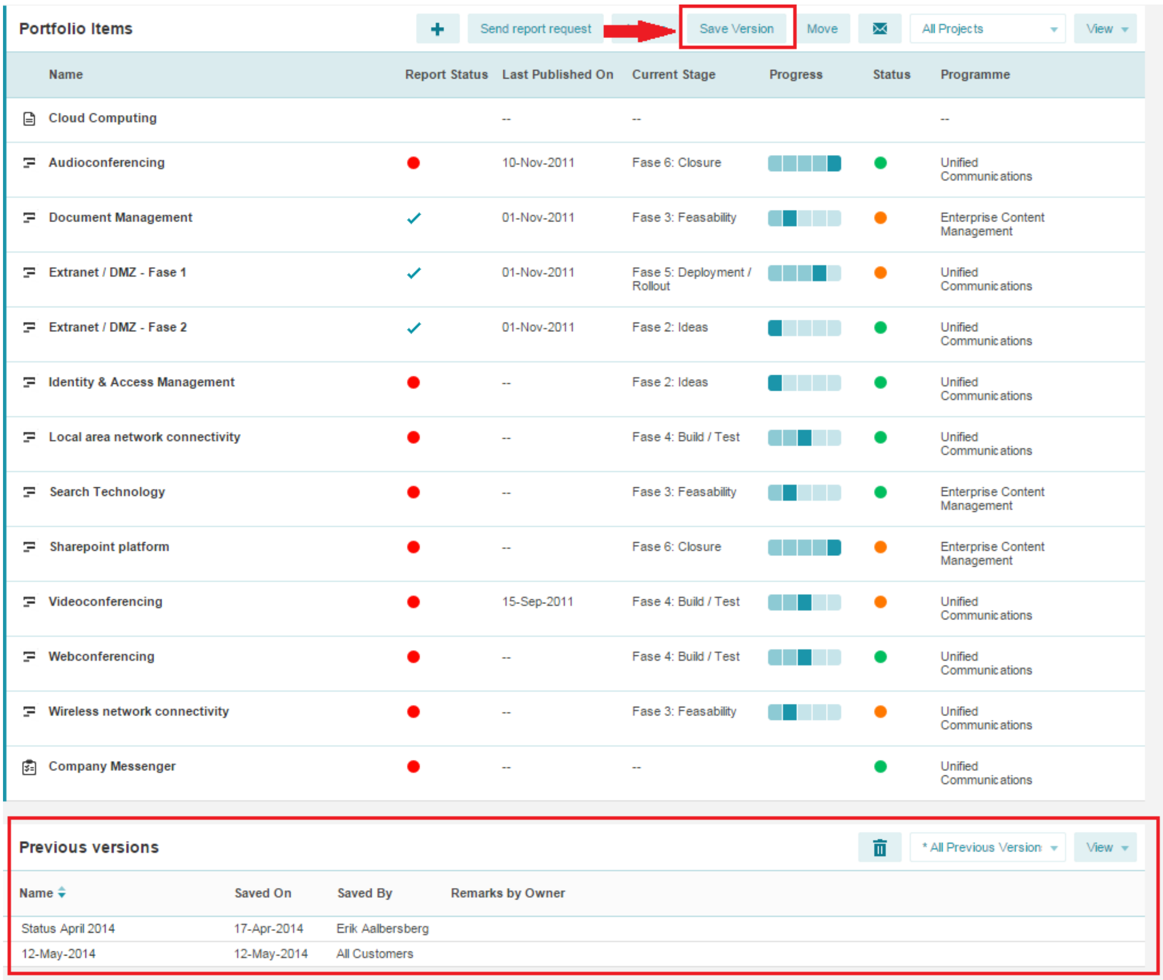
Creating a snapshot

1. Open the dashboard of the portfolio

2. Use the **'Save 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.



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.*

3.2.4 Managing a portfolio

3.2.4.1 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.

3.2.4.1.1 Requesting reports

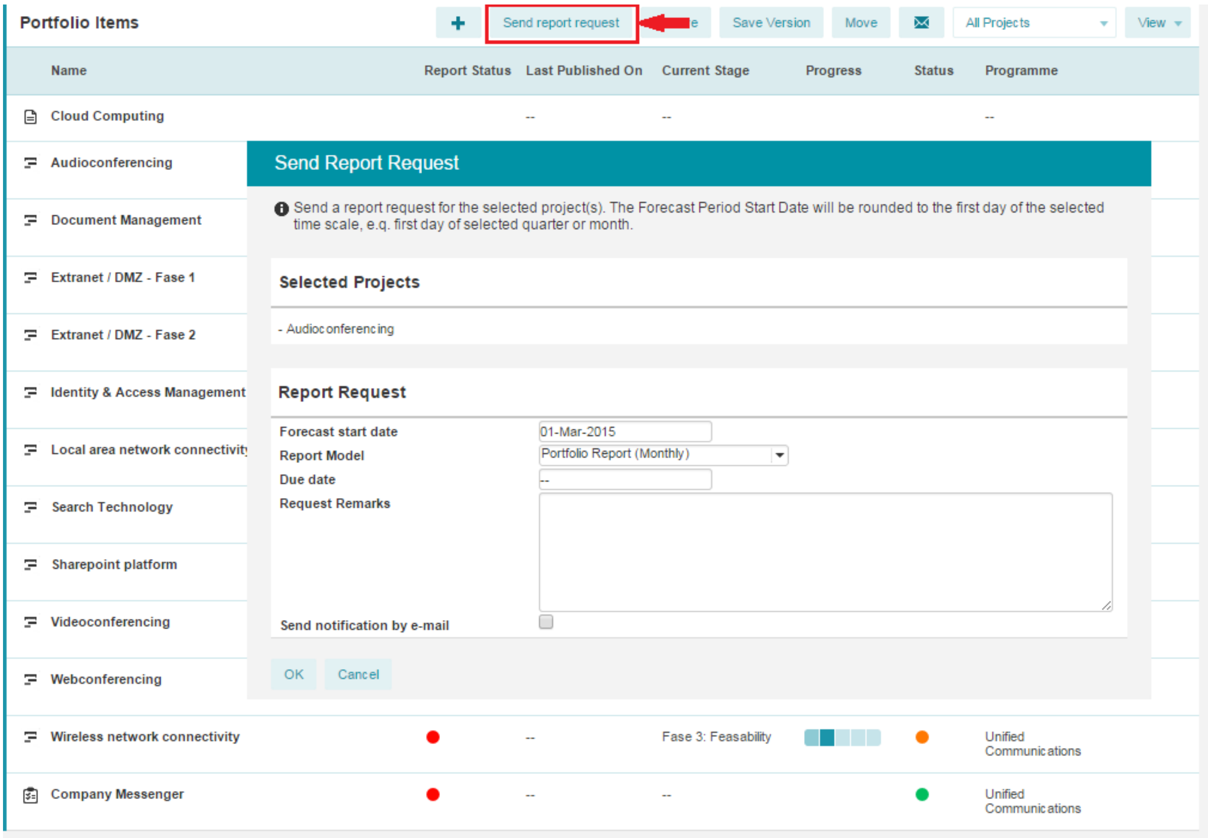
The Portfolio Management module allows one to introduce a periodic reporting cycle. The report is requested from the Portfolio side and appears on the project where the project manager can fill it out. Once the Project Manager publishes the report, it updates the information within the portfolio which 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 64'.

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

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

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

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



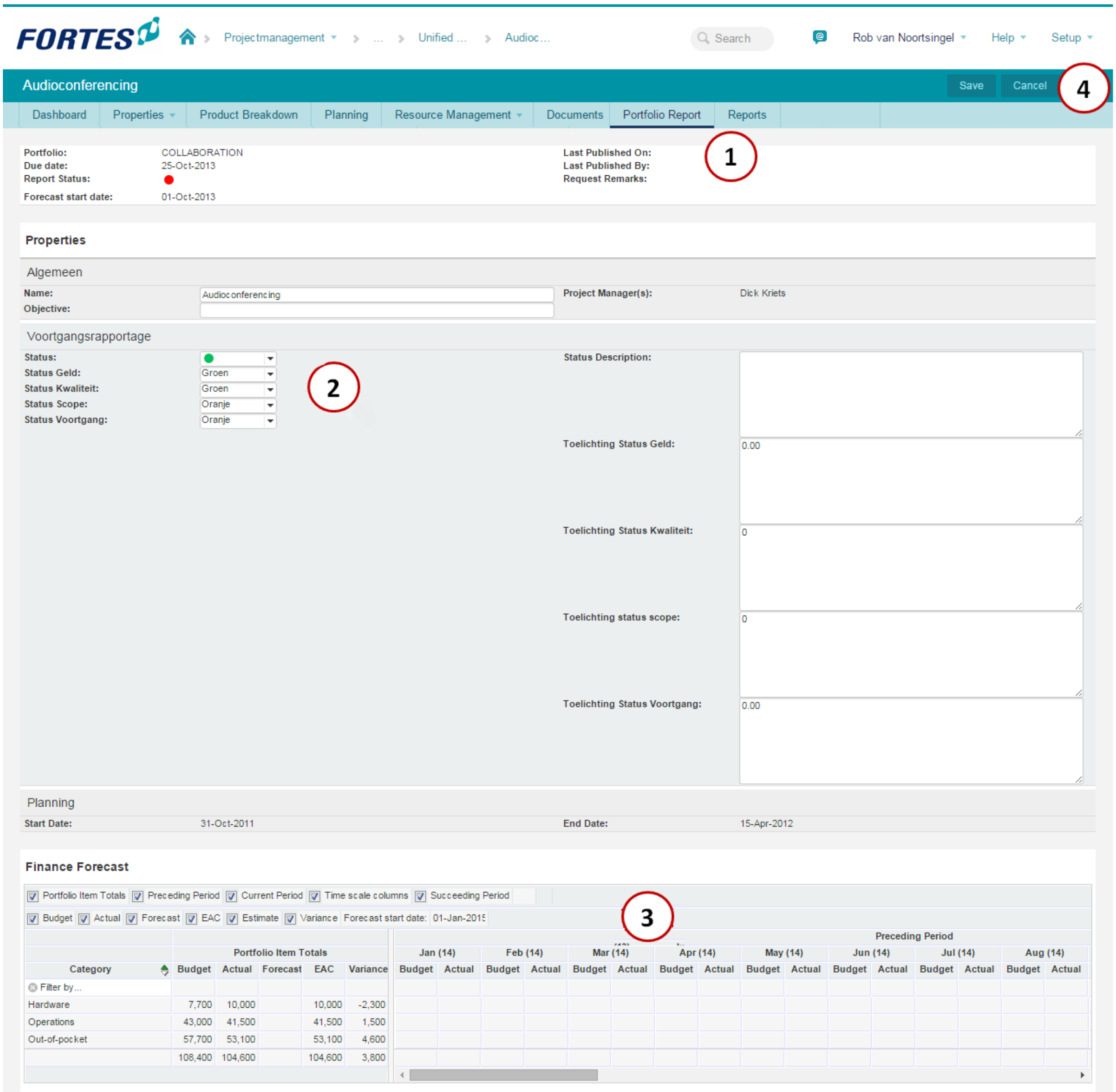
The report request will be send to the selected projects

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.



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.

3. Next, financial information (mostly forecasting) is updated.

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

Monitoring the report status

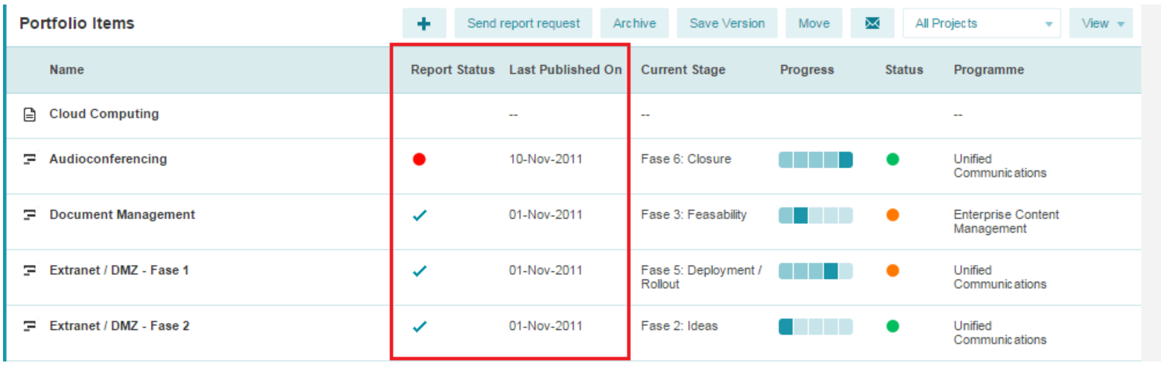
From the portfolio, the portfolio manager can monitor the status of the report requests that were sent out.

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.



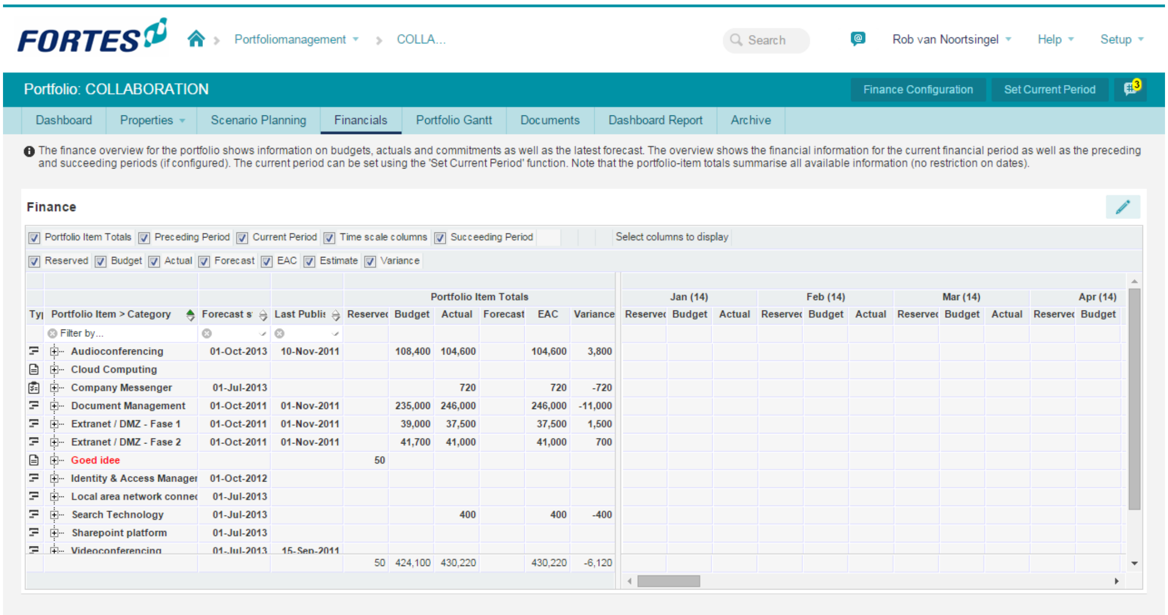
The dashboard shows the status of the report request

3.2.4.2 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).

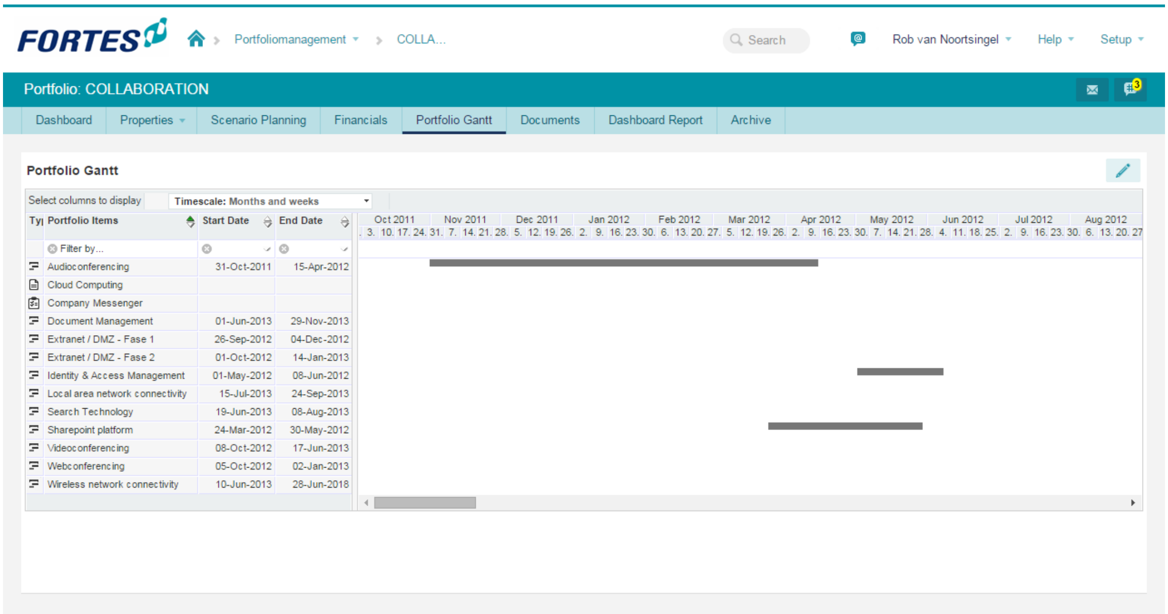
The financial overviews can be configured in many ways to suit different needs. Please check 'Financial configuration' 67 for more details on how to configure the financial overview.



The financials overview on the portfolio

3.2.4.3 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.



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.

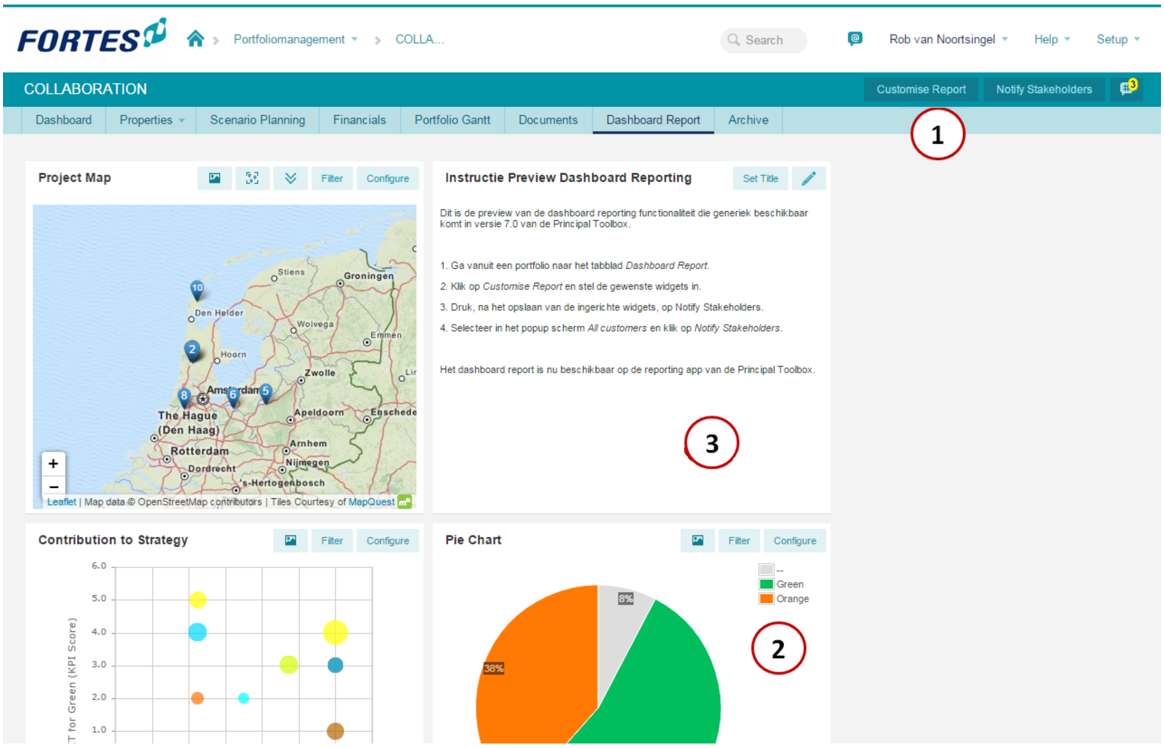
3.2.4.4 Stakeholder reporting

As of release 7, it is possible to create special dashboard reports that can be used for stakeholder reporting. Dashboard reports are available upon portfolio's and saved versions within a portfolio. Note that on a portfolio the dashboard report will show dynamic data whereas the reports will show static data on a portfolio version (from the specific version).

> ***Note**: Configured dashboard reports on portfolio are copied to saved versions*

Dashboard reports are entirely built upon widgets and can be sized, placed and reordered in any way needed.

To access dashboard reports, navigate to a portfolio and then click on the tab 'Dashboard Report'.

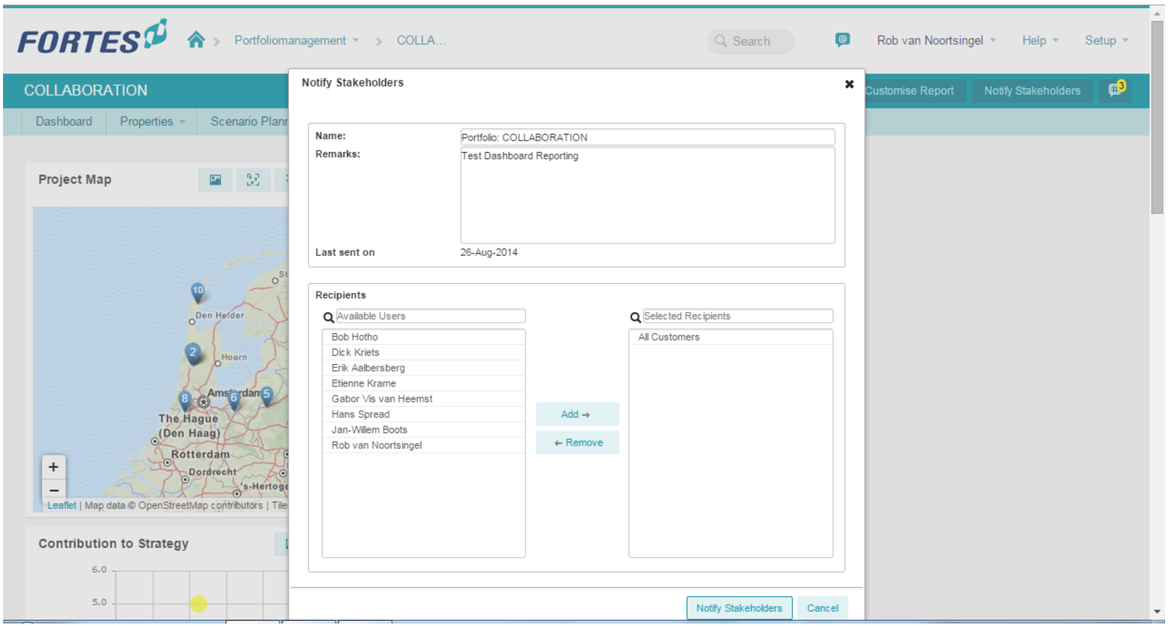


Edit dashboard report

To create or modify the report click '**Customise Report**'. After that, you can (1) add new widgets, (2) choose what type of widget to place, (3) resize and relocate the position of the widgets.

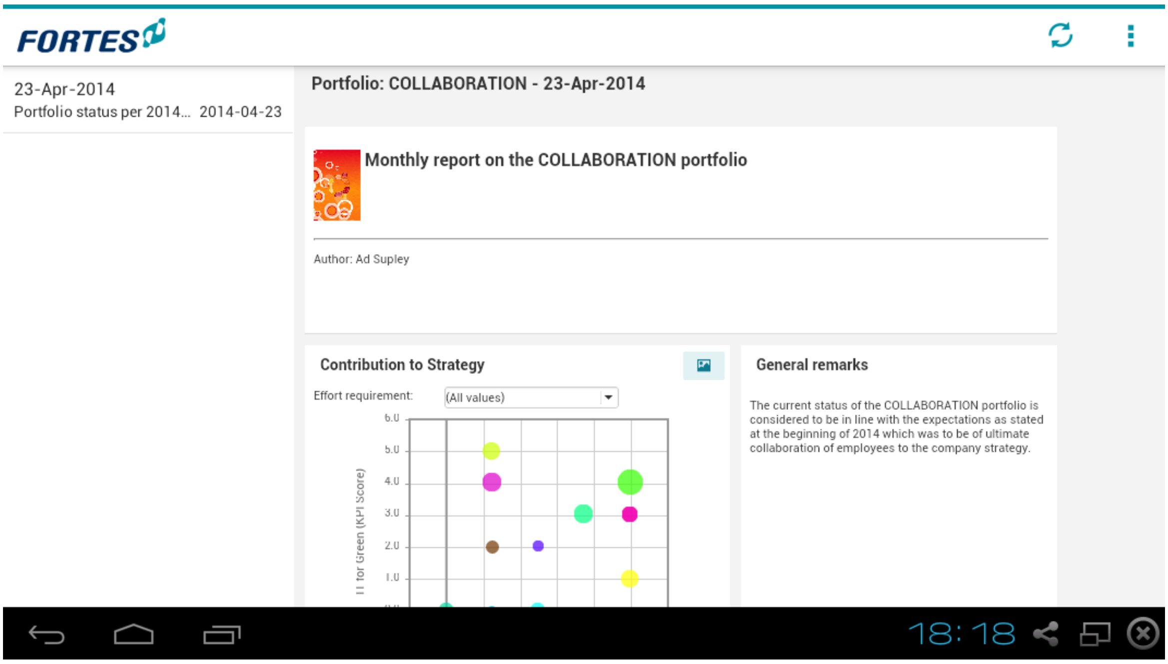
Widgets can also be removed and configured as normal.

When the dashboard report is created, you may notify your stakeholders.



Notify stakeholders

Selected recipients will get notified that a report is available. If this user has a registered tablet application (installed and used), the reports will appear on their tablet (iOS and Android).



Dashboard report on tablet (Android)

3.2.4.5 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 174 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

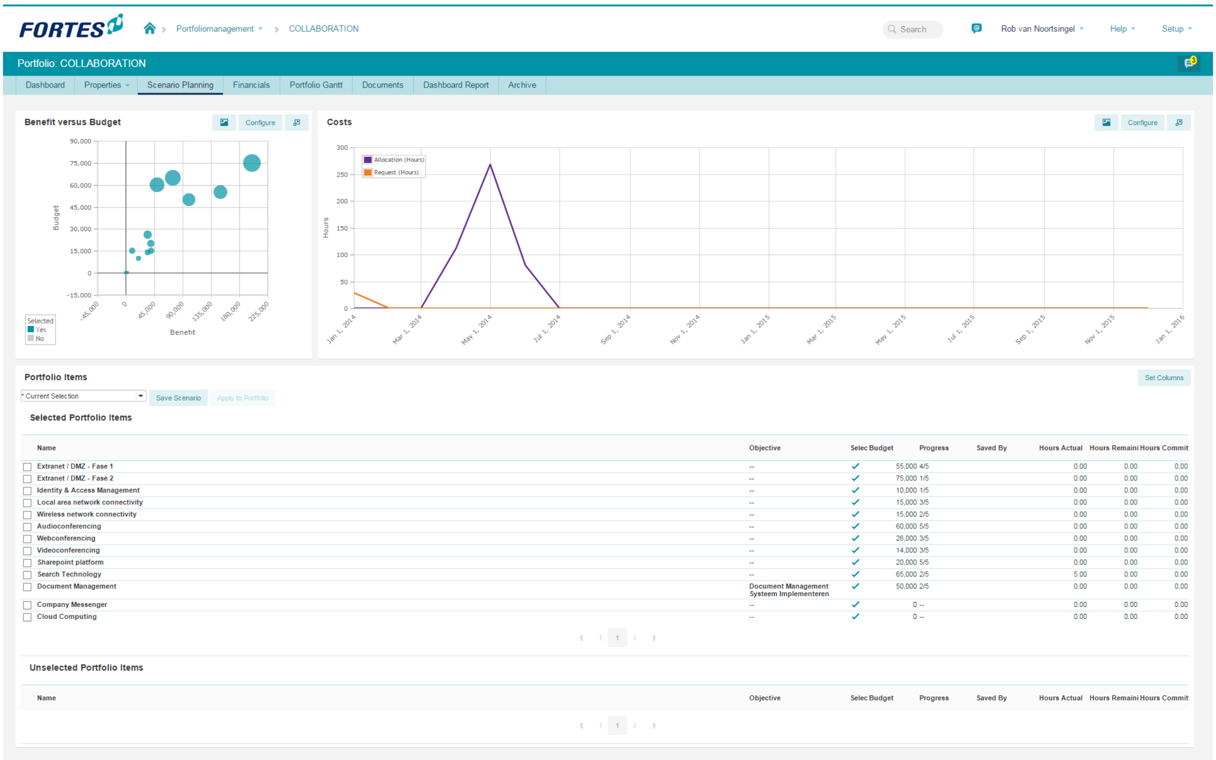
entries.

- **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 Timeline reports 170.

3.2.4.6 Scenario Planning

As of version 7.5 of the Principal Toolbox it is possible to plan multiple scenarios.
This can be done by navigating to the appropriate portfolio, tab '**Scenario planning**'.

You will then be directed to the scenario planning overview.



The scenario planning tab

On the top are two graphs. The first is the budget and risk chart displaying '**Return On Investment**' and '**Budget**' on the axis and '**Risk**' is depicted by the size of the bubble.
This chart can be configured the same way as a regular bubble chart 188.

The second graph shows the forecast for the coming months and is based on the timeline widget.
This chart can be configured the same way as a regular timeline widget 188.

Below the two charts there are two lists. The first list contains the selected projects and the second list contains the unselected projects.
Selected and unselecting projects allows for multiple scenarios to be analysed.

Selecting and/or unselecting projects can be done in two ways:

1. Clicking on the appropriate bubble (project) in the bubble chart (un)selects a project.

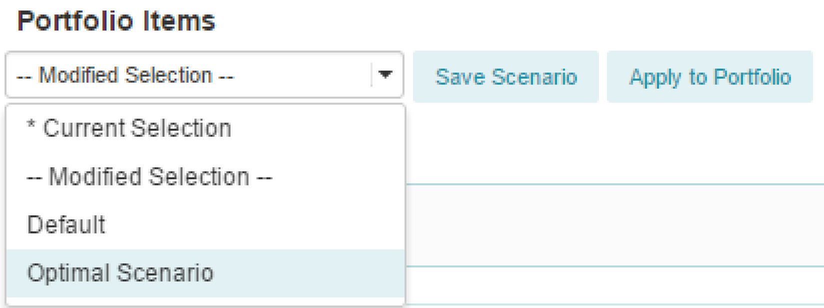
2. By dragging and dropping a project from one list to another.

The generated scenario's can then be save by clicking 

.

These saved scenario's can be applied to the portfolio by selecting the scenario in the drop down menu and clicking 

.



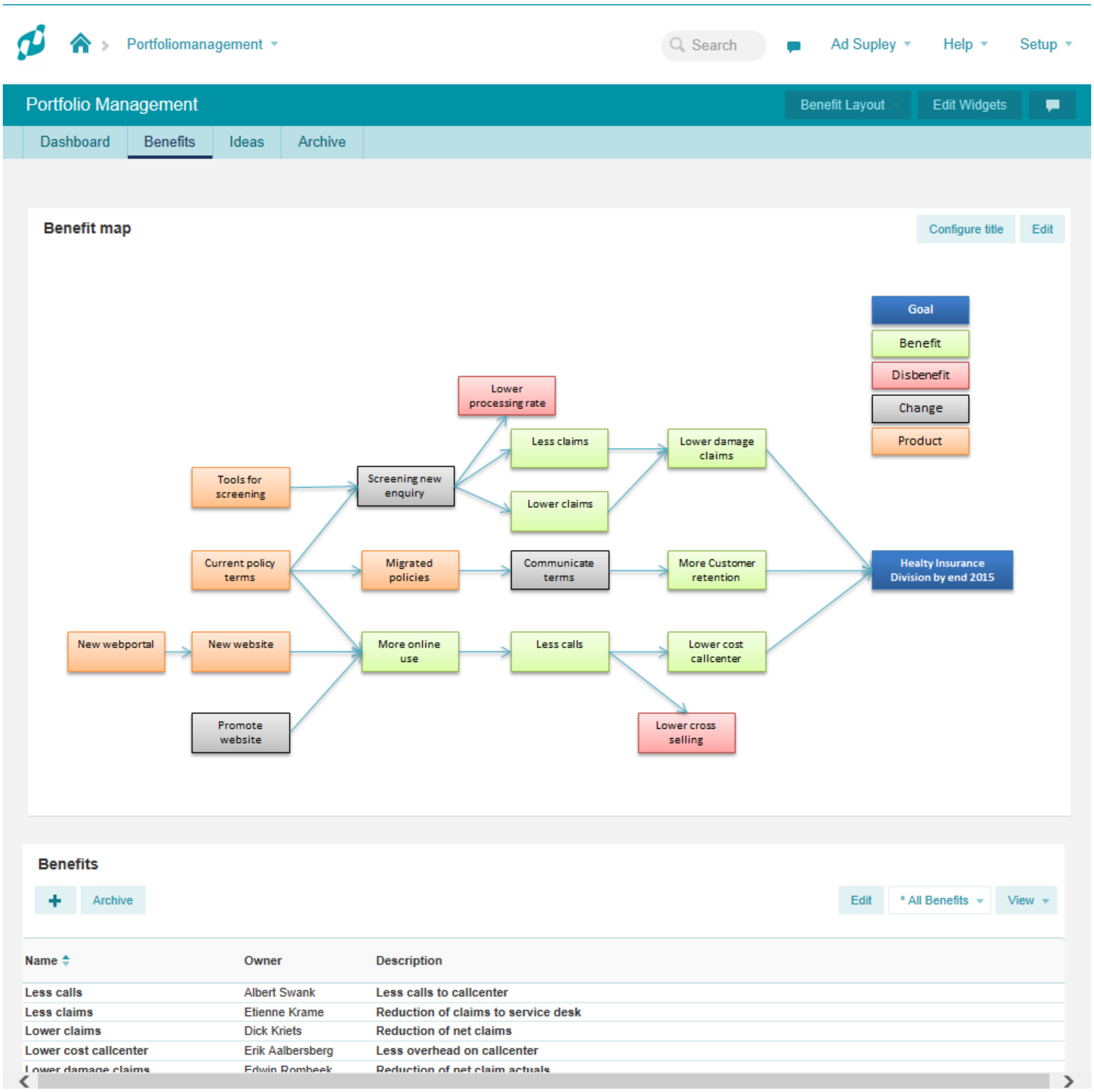
Select the appropriate scenario to apply to the portfolio.

3.3 Benefits definition and tracking

As of release 7.0 it is possible to register benefits within portfolio management and track their progress related to the initiated, running and/or completed projects.

> ***Note**: Benefits have as of yet little built-in fields and will need custom field definitions to implement definition and tracking possibilities.*

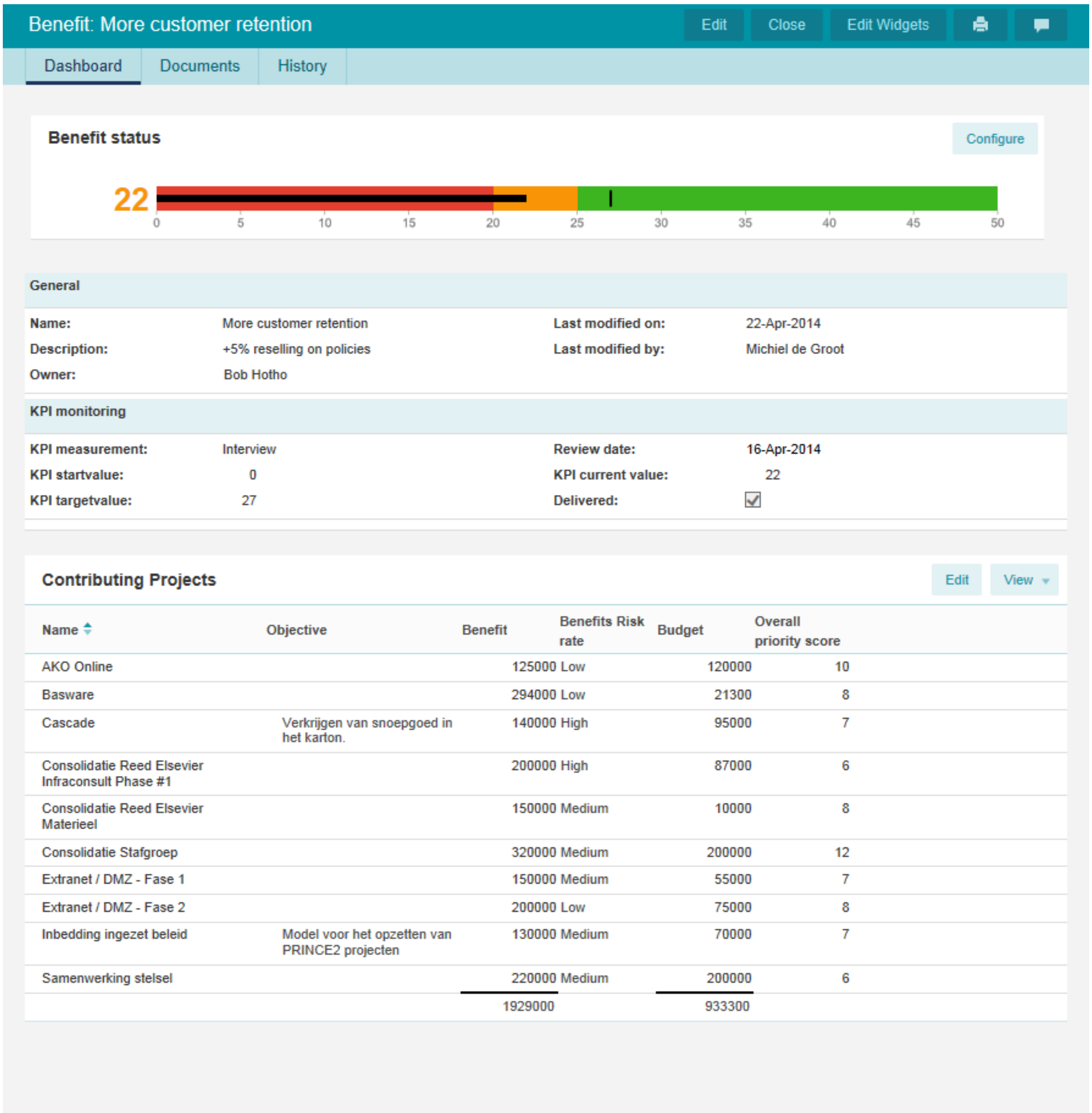
By clicking the benefits tab (**Benefits**) the page refreshes to the list of defined benefits.



List of benefits and their graphical representation with relations (map).

Benefits can be added, removed (1) and edited (2) as is common within the Principal Toolbox.

By clicking a benefit, the details are opened and can be edited. The page layout of the benefit is set by using the page layout editor (3) in the same way as [defining a project sheet](63) (available to managers and administrators only).



Detail page of benefits

Within the detail page, default (1) and custom (2) fields can be edited as well as documents added or removed (3) on a separate tab.

Each benefit can also be configured to list the contributing projects. This list is defined by a simple filter to which the projects should match. From these projects, information can be listed.

> ***Note**: There is no built-in calculation from contributing projects towards the benefit. If needed, this should be realised using custom field calculations.*

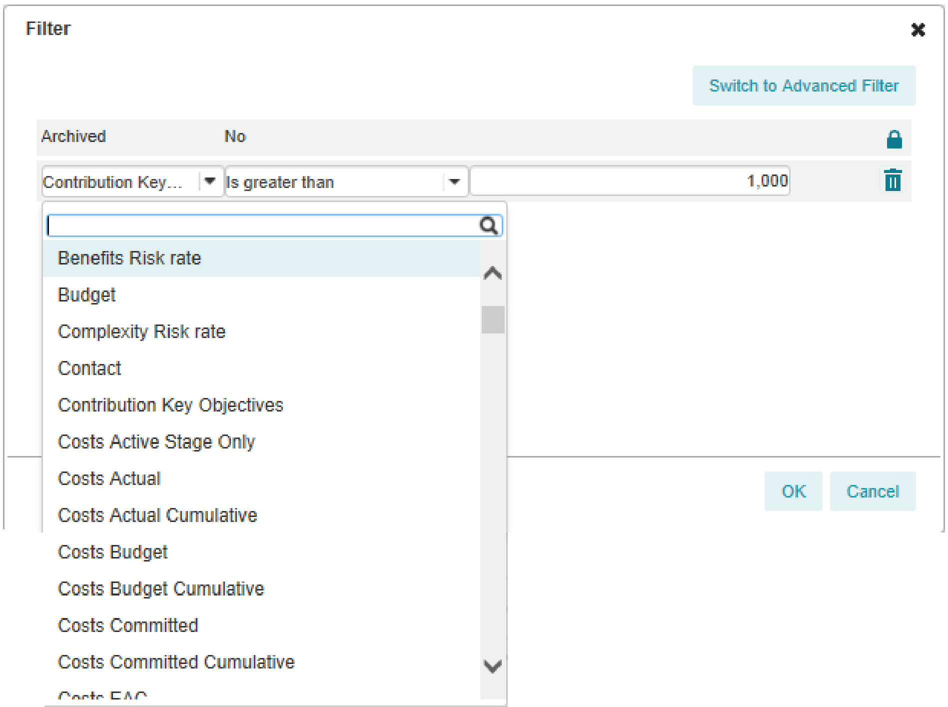
3.4 Using custom dashboards

Custom 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 a custom dashboard, reporting facilities are available to create a tailored reporting model for the scope of the dashboard.

> ***Note**: Prior to release 7, custom dashboards were named portfolio dashboards.*

> ***Note**: A custom dashboard primarily provides viewing information, it does not allow modification of information.*

To define the projects that will be listed within a custom 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.



Buttons and dashboard filter

Only the Dashboard owner (or administrators) may set the dashboard filter. Other roles on the custom dashboard are described in permissions and roles 22.

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

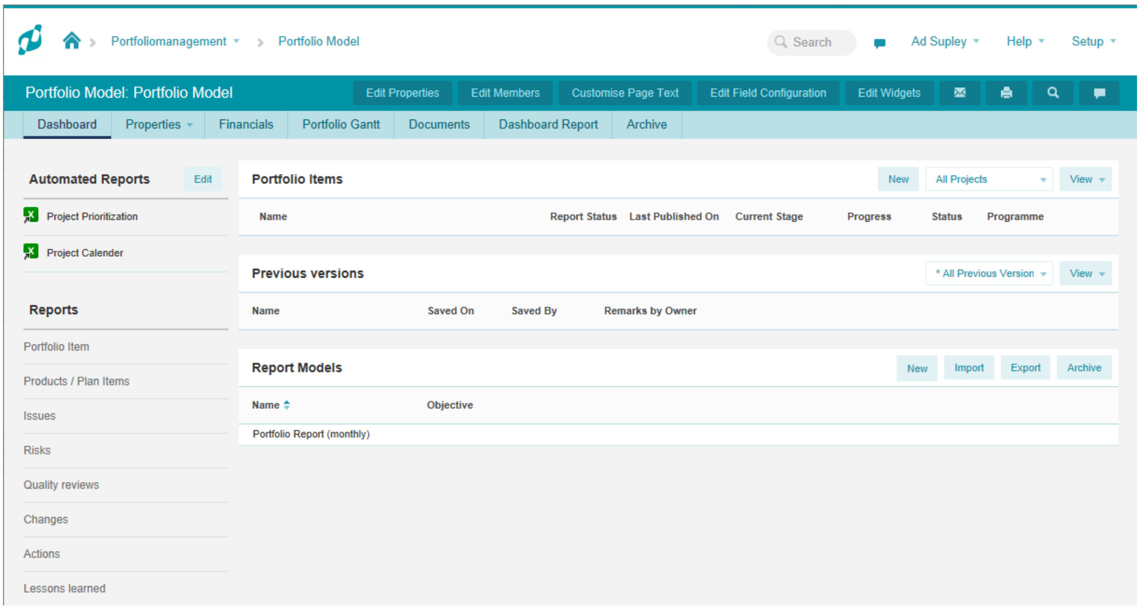
Functionality	**Remarks**
Create/start projects	A custom dashboard only shows existing (portfolio) projects and does not allow to create or start new portfolio items/projects.
Report requests	Portfolio reporting is done through the base portfolio of a portfolio item and cannot be initiated through a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

3.5 Portfolio model configuration

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 Automated reports 174 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*



Example portfolio model

3.5.1 Defining a project sheet

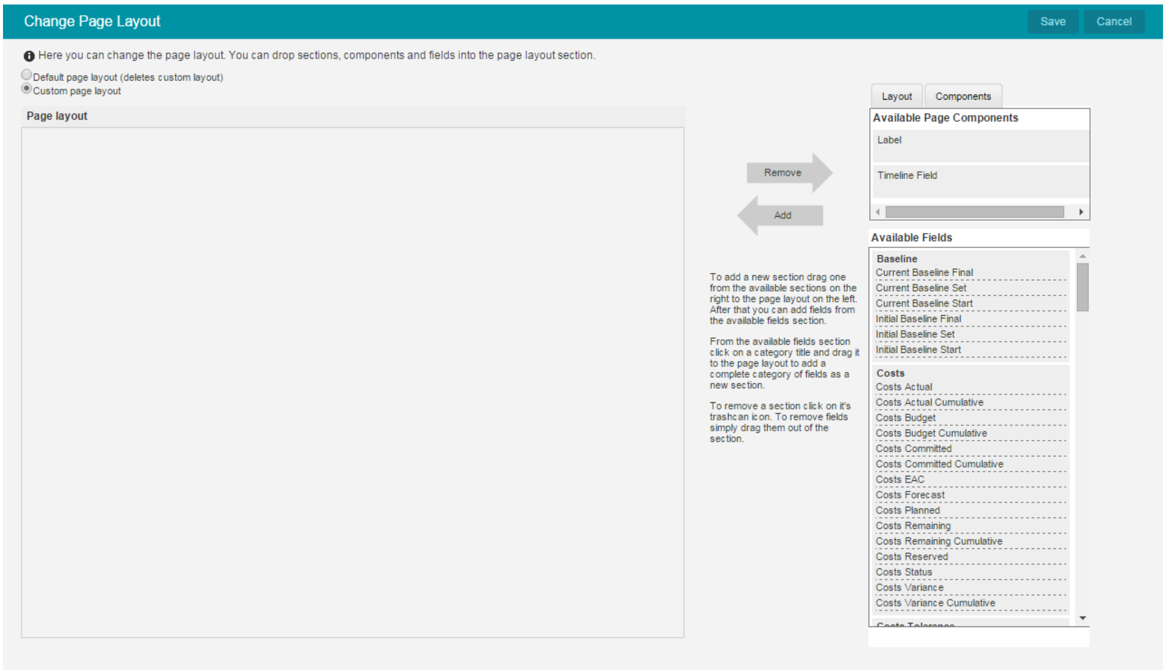
The page lay-out of the project sheet, which is shown when opening a portfolio item, can be customized for each portfolio or portfolio model. The project sheet can be used in displaying the basic project or initiative properties, including custom fields and status information. The page lay-out is defined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

1. From the Portfolio Management dashboard, open a portfolio model or one of the existing portfolios.

2. Press the button **'Portfolio item layout'**.

3. Press the button **'Edit Layout'**.

4. 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.



Editing the page layout

3.5.2 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. Click **'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:

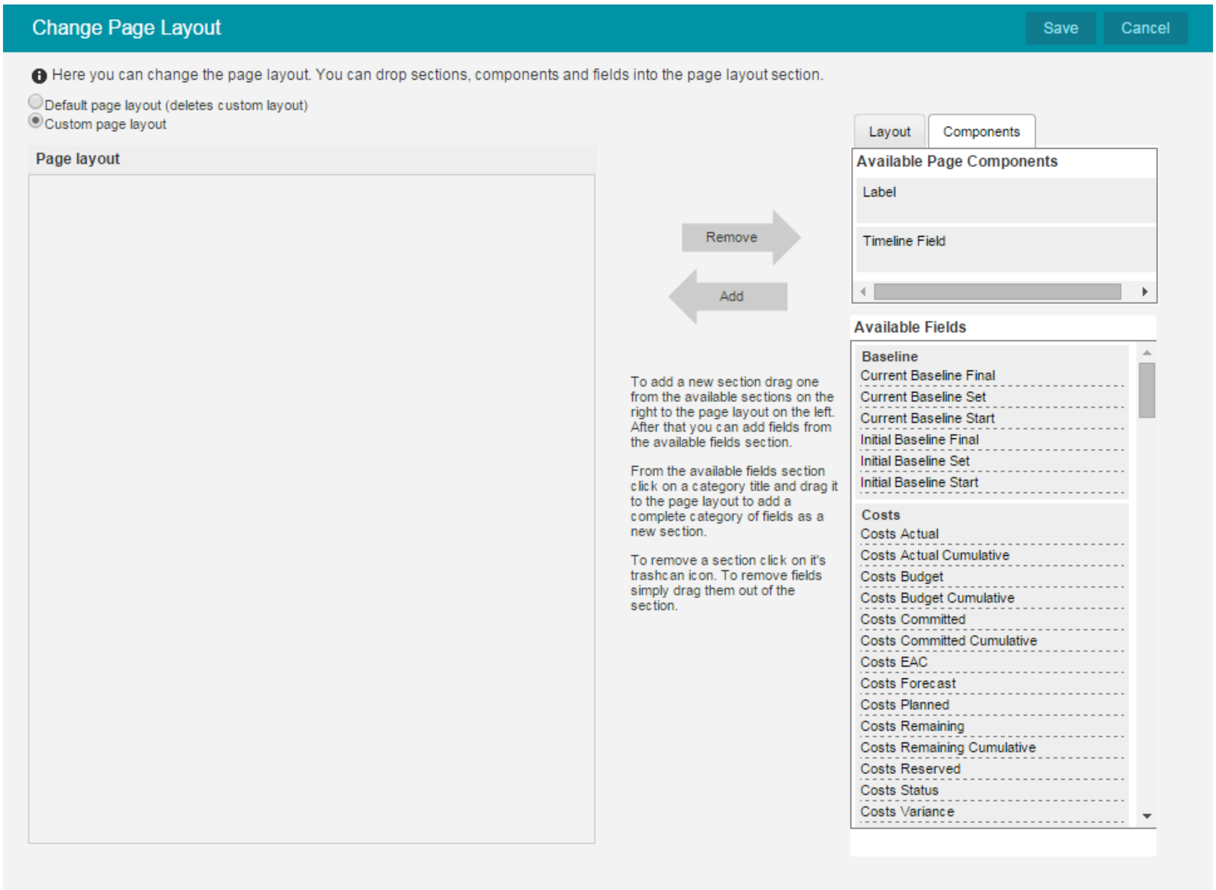
1. From within the portfolio model (or from an existing portfolio), click on the name of the reporting model that needs configuring.

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 in the 'Layout' section.

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.



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

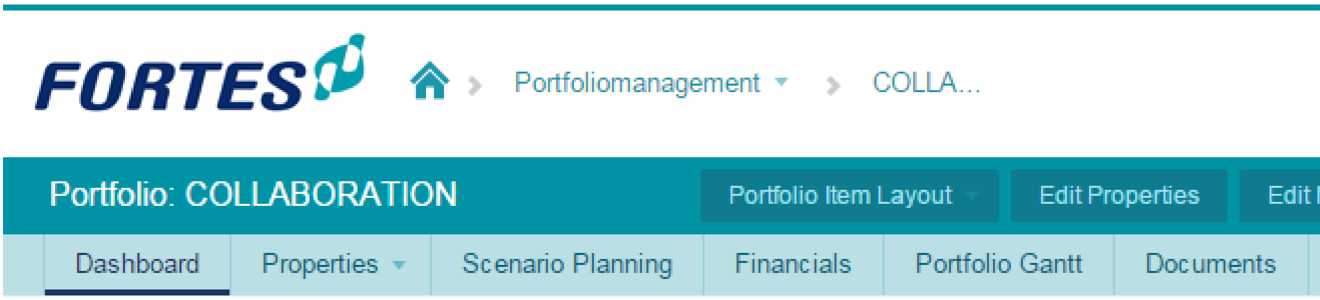
6. Besides the 'Properties' section, the 'Finance' section can be customized separately. Please refer to 'Financial Configuration' 67 for more information.

3.5.3 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.



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

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

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

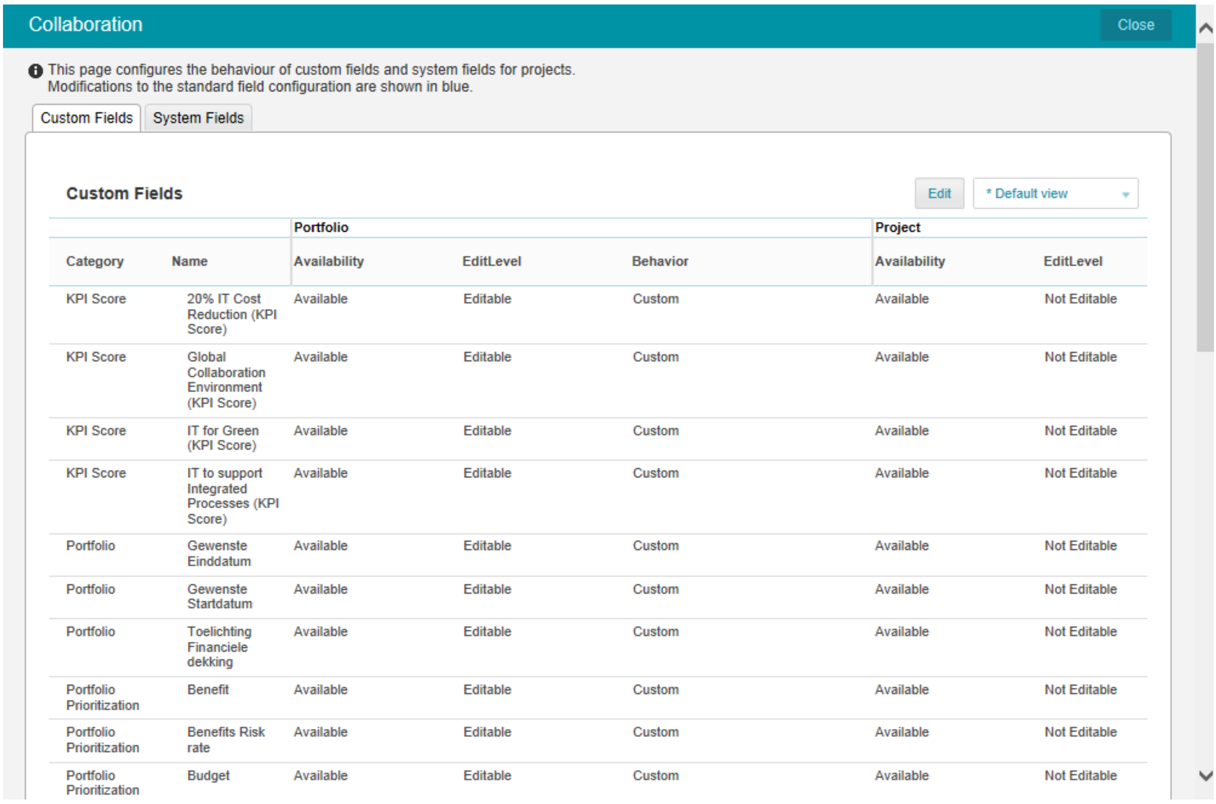
> ***Note**: Synchronization only works one way! It's either synchronized from project to portfolio or from portfolio to project, but not both ways.*

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

Changing the field configuration

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

2. Press **'Edit'** to change the settings of the fields.



		Portfolio			Project	
Category	Name	Availability	EditLevel	Behavior	Availability	EditLevel
KPI Score	20% IT Cost Reduction (KPI Score)	Available	Editable	Custom	Available	Not Editable
KPI Score	Global Collaboration Environment (KPI Score)	Available	Editable	Custom	Available	Not Editable
KPI Score	IT for Green (KPI Score)	Available	Editable	Custom	Available	Not Editable
KPI Score	IT to support Integrated Processes (KPI Score)	Available	Editable	Custom	Available	Not Editable
Portfolio	Gewenste Einddatum	Available	Editable	Custom	Available	Not Editable
Portfolio	Gewenste Startdatum	Available	Editable	Custom	Available	Not Editable
Portfolio	Toelichting Financiele dekking	Available	Editable	Custom	Available	Not Editable
Portfolio Prioritization	Benefit	Available	Editable	Custom	Available	Not Editable
Portfolio Prioritization	Benefits Risk rate	Available	Editable	Custom	Available	Not Editable
Portfolio Prioritization	Budget	Available	Editable	Custom	Available	Not Editable

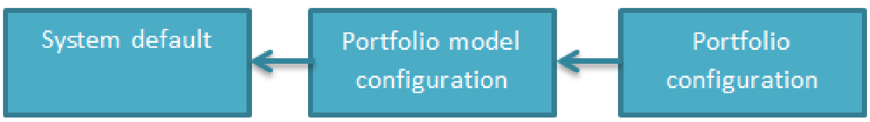
Field configuration

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

Settings	Options	Resulting behaviour
Available	No Local Configuration	No configuration applicable
	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
Edit 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
	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)
Behaviour	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)
	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.

Note that alterations to the configuration is shown in **blue**. If not altered, the configuration follows the normal inheritance behaviour:



Inheritance of field configuration

3.5.4 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.

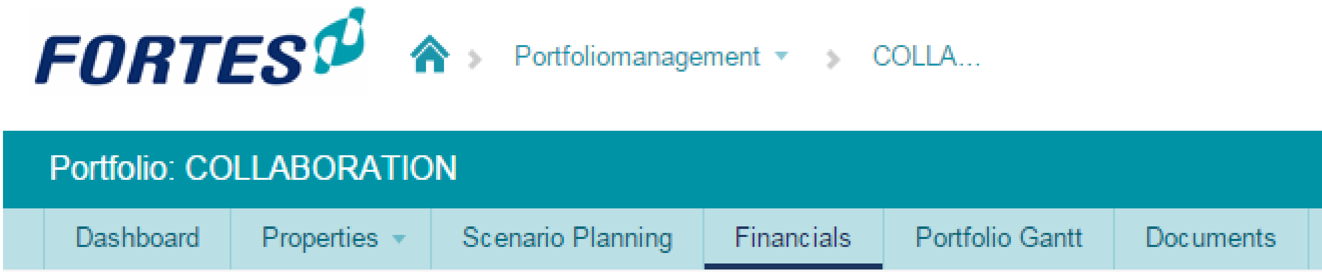
The following items of the financial overview can be configured to suit different needs:

- 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'.**



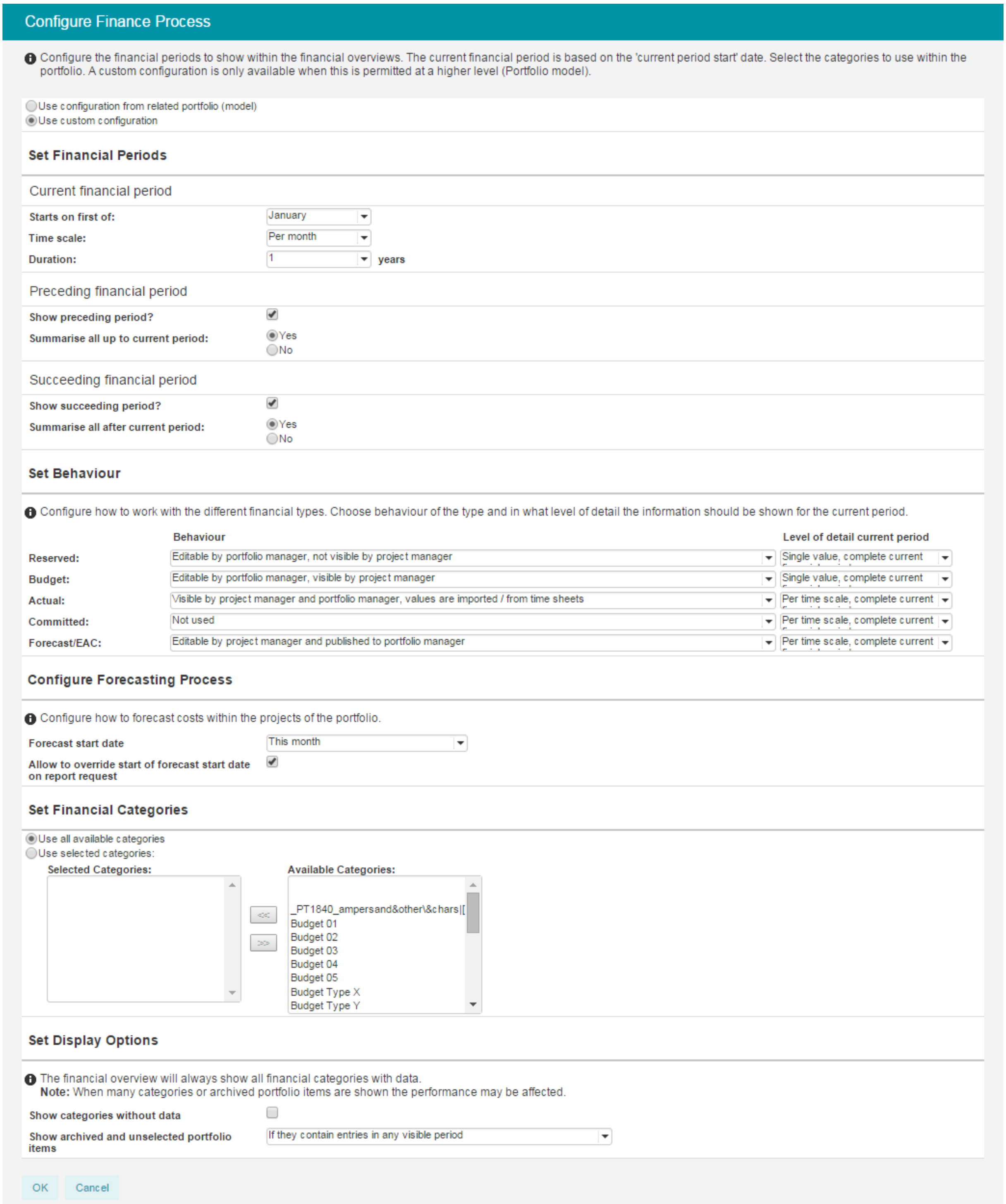
Finance Configuration

3. The window that opens allows the financial configuration to be changed

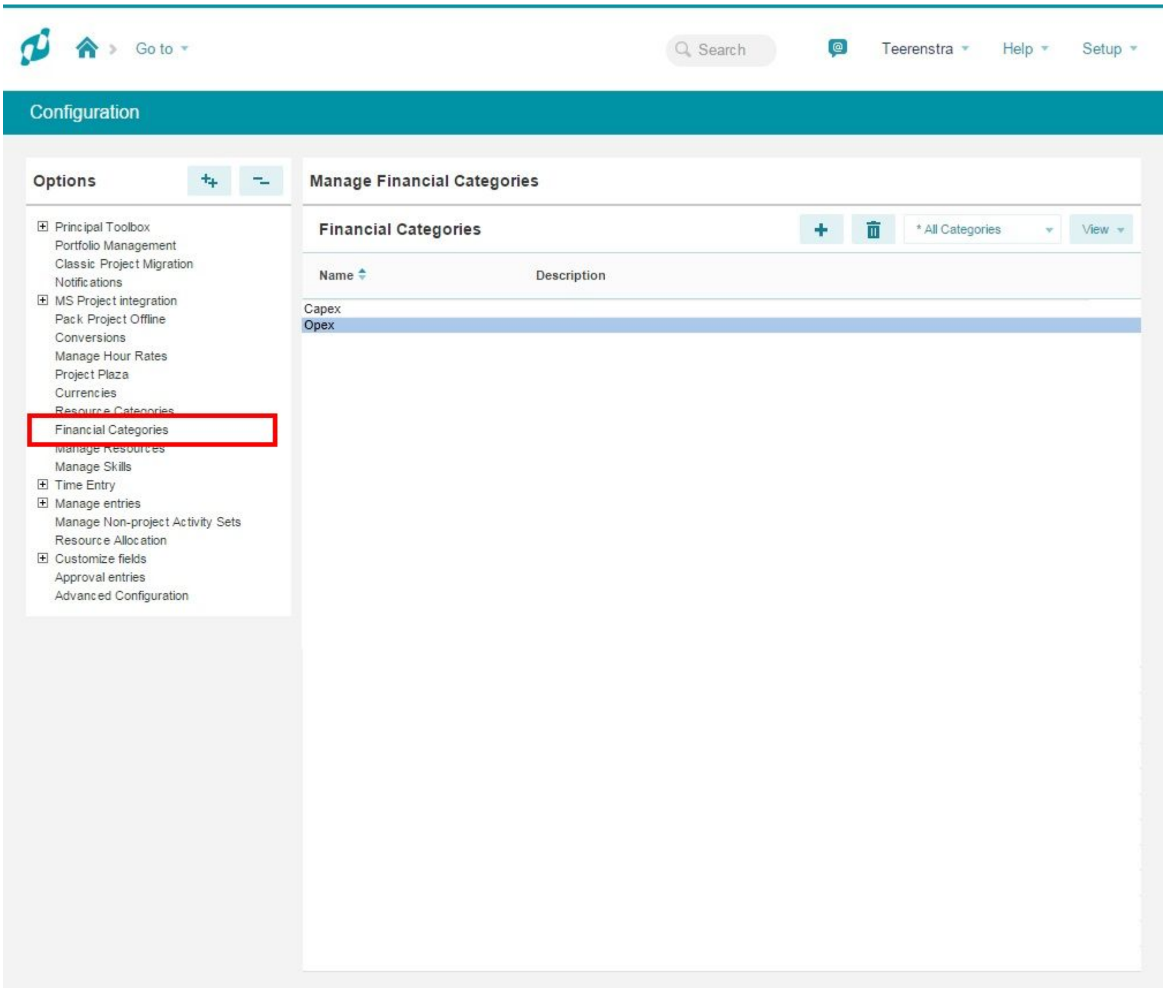
4. Select **'Use custom configuration'**, which will bring up more settings

5. The following items can be configured:

Financial periods	:	Set the current financial periods, and whether to show the preceding and / or next financial 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	:	Choose whether to show financial categories which have no data attached



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.

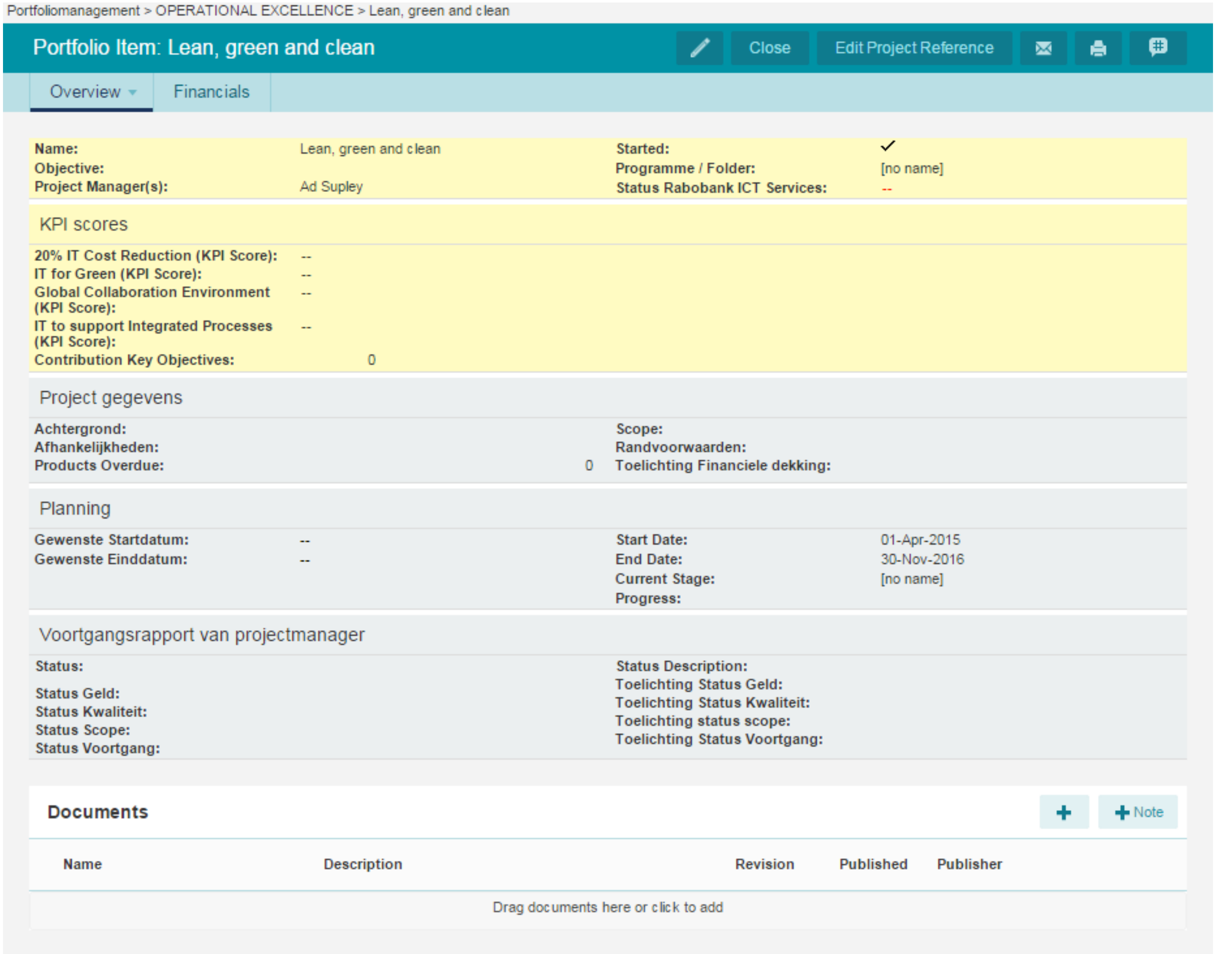


Creating financial categories

4 Programme Management (add-on)

As of release 8.0 of the Principal Toolbox there is a new programme management functionality.

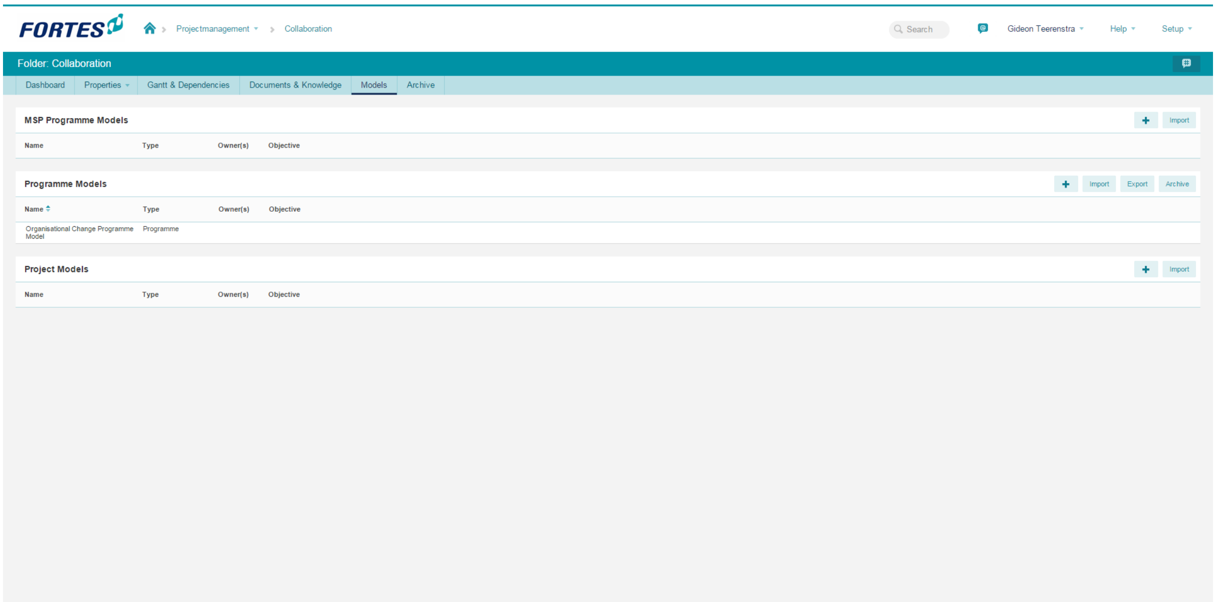
This functionality is provided as a programme management model.
Programme management provides modern functionality and reporting and links to portfolio management.
It facilitates large scale organisational changes.



The programme management dashboard

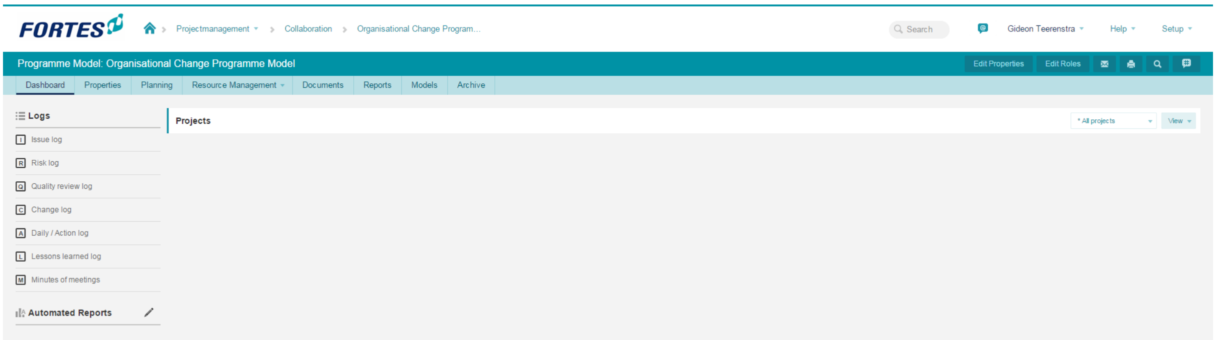
4.1 Programme Management Model

Navigate to the project management folder, tab '**Models**'



Overview of the available models

Click the folder model to open it.



Programme Model dashboard

In the project model all standard properties, roles, documents, etc. can be configured in the same manner as for project 35 and portfolio 63 models.

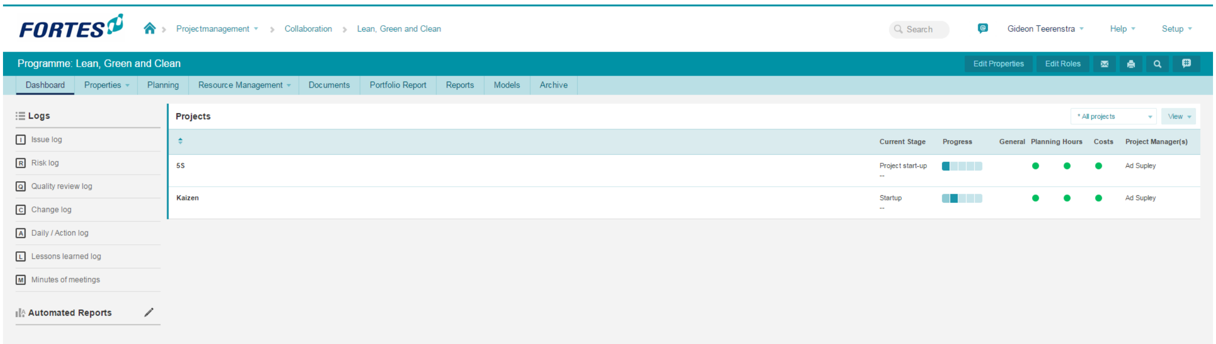
4.2 Integrated Programme Management

Within a programme it is possible to create a planning, including projects and their deliverables.

Projects within the programme plan can be:

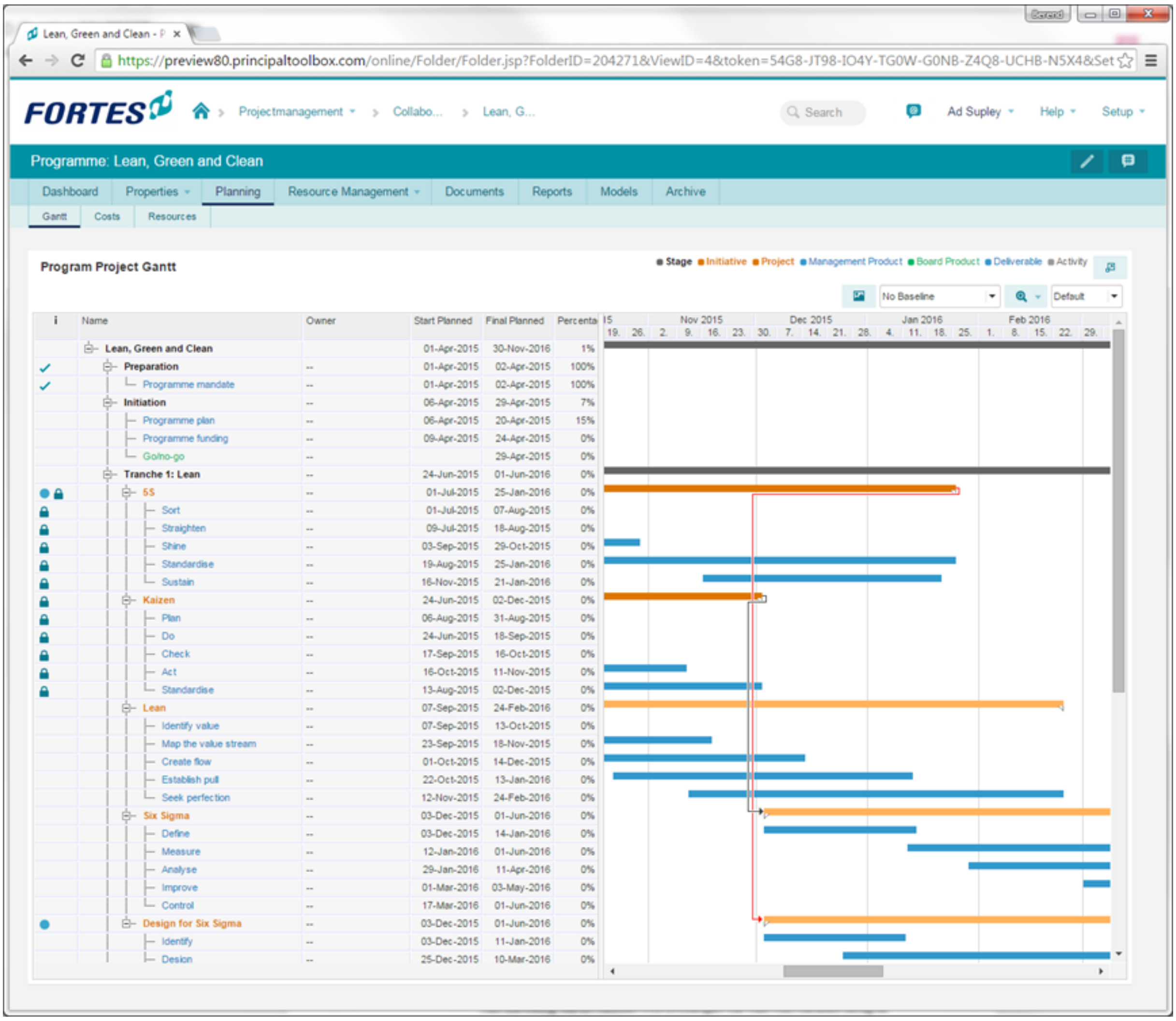
- Identified without requiring a full blown operational project
- Started as a full blown project with the planning set to a certain date
- Contain deliverables identified by the folder manager
- Have dependencies with other plan items in the folder plan

Identified projects (initiatives) can be planned and started from within the folder. When the project is started, the project manager defines the detail planning.



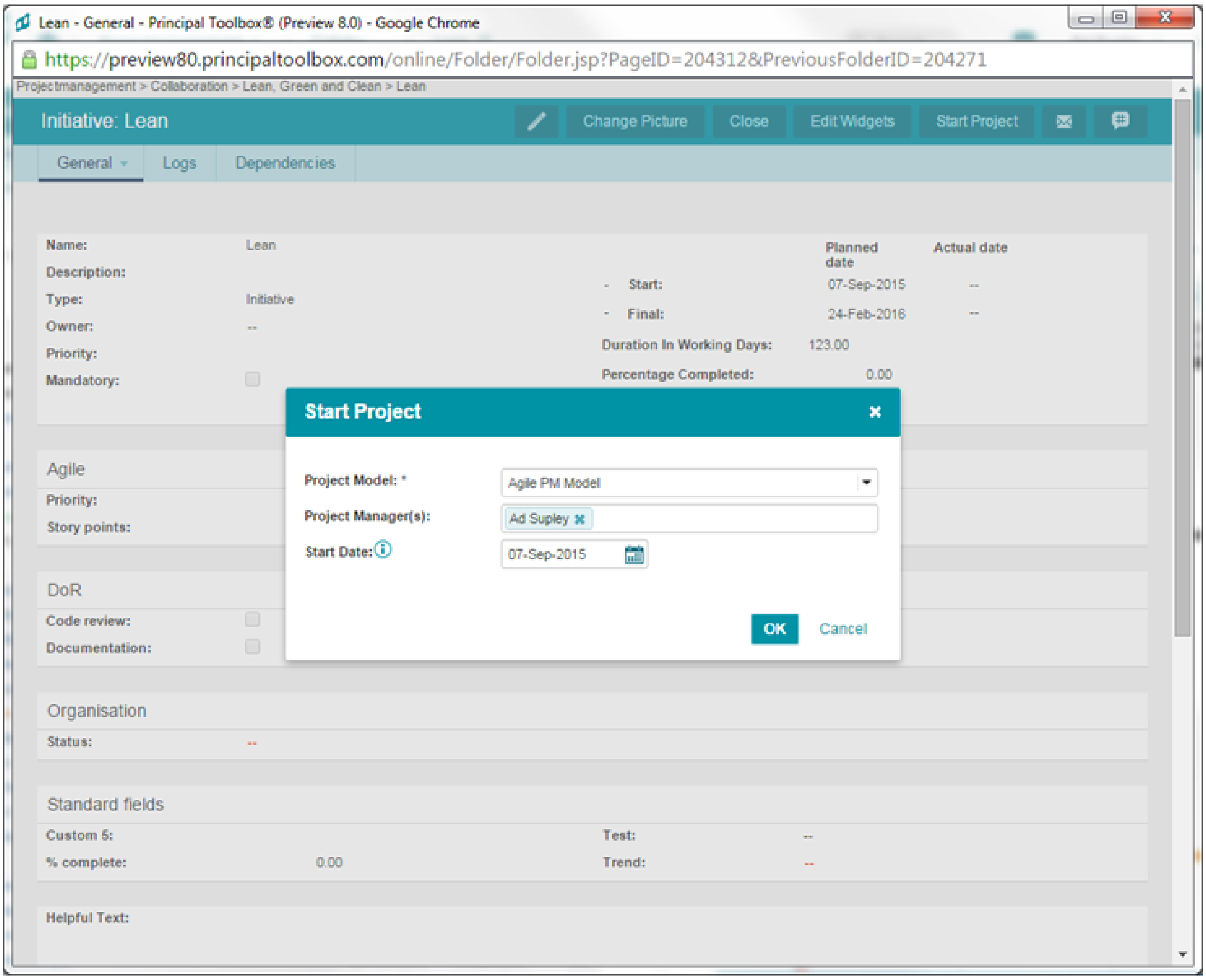
Programme Dashboard

In the Programme project Gantt initiatives are shown in a 'lighter' shade.



Programme project Gantt

Programme projects can be started from the projects' detail page (on the program plan).
On starting the project, the planning (as contained in the project model) can be moved to a certain date.



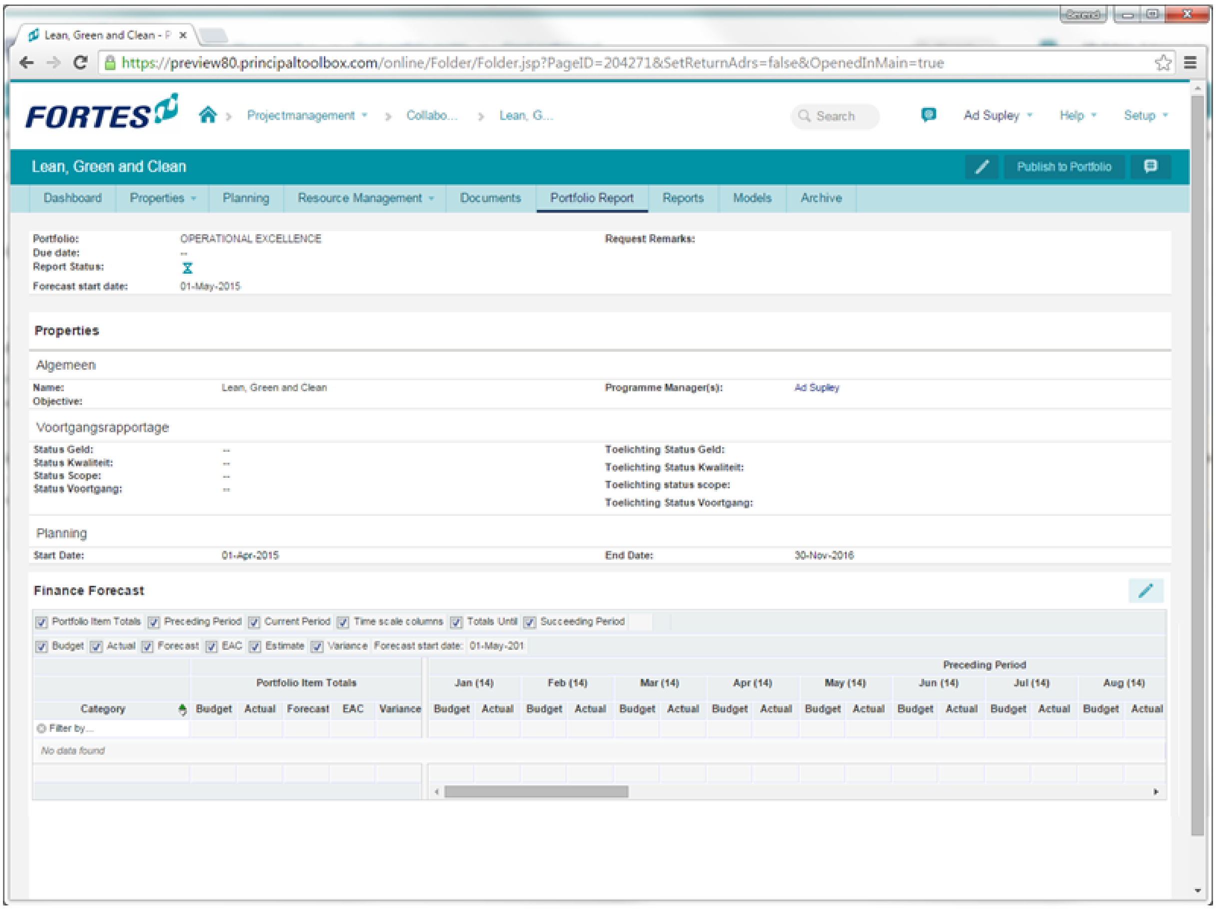
Starting a programme project

4.3 Programme to Portfolio reporting

Programmes can be started from a portfolio (just like projects) and have the same reporting cycle as projects currently in a portfolio.

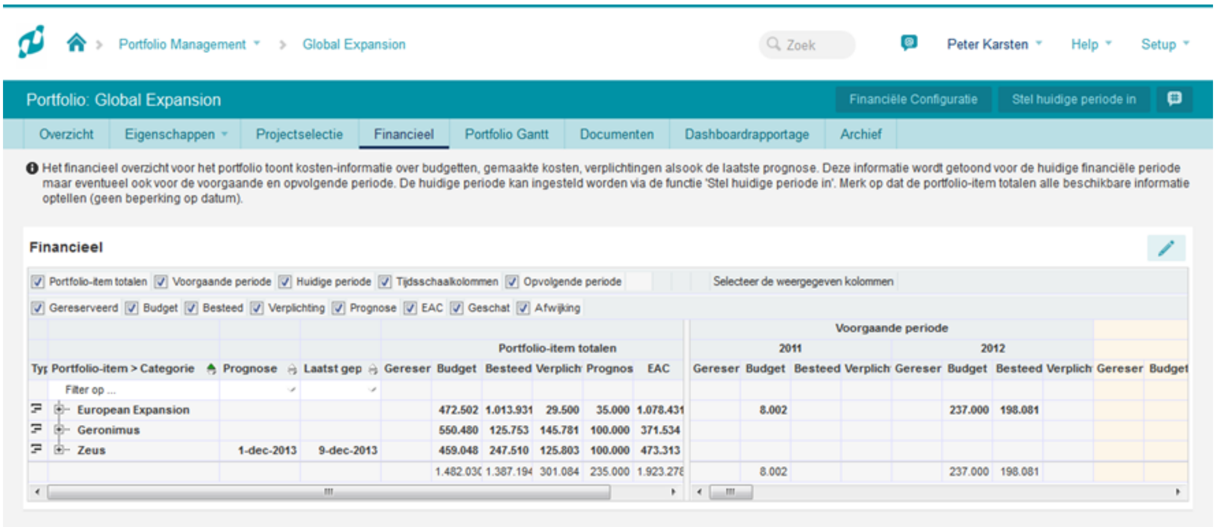
Programmes will typically include/summarise the data from underlying projects extended with the folder status information.

Programme managers publish summarised statuses to the portfolio.



Program status report

On the portfolio, an integrated view exists of all portfolio items (initiatives, folders and projects).



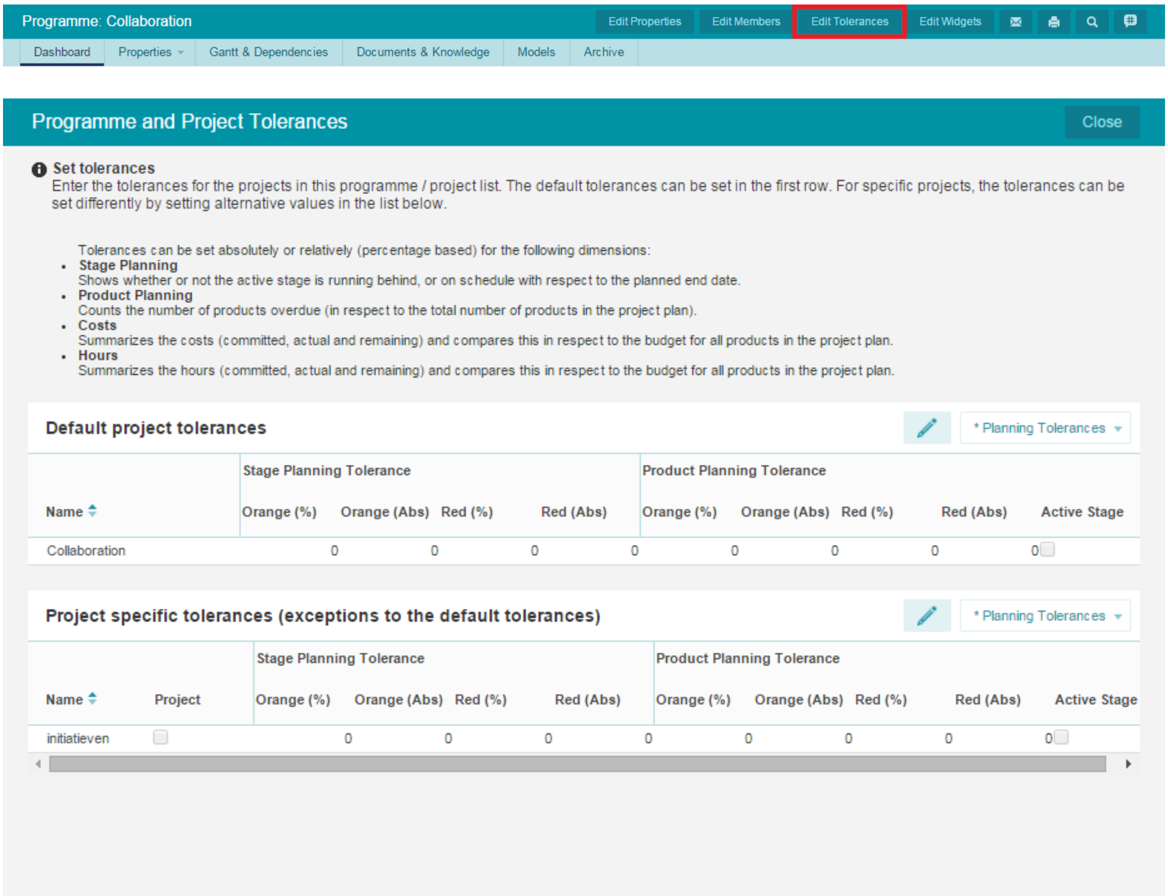
Integrated view of all portfolio items

4.4 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 folder dashboard.

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

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



Tolerances can be set for the entire folder or project specific

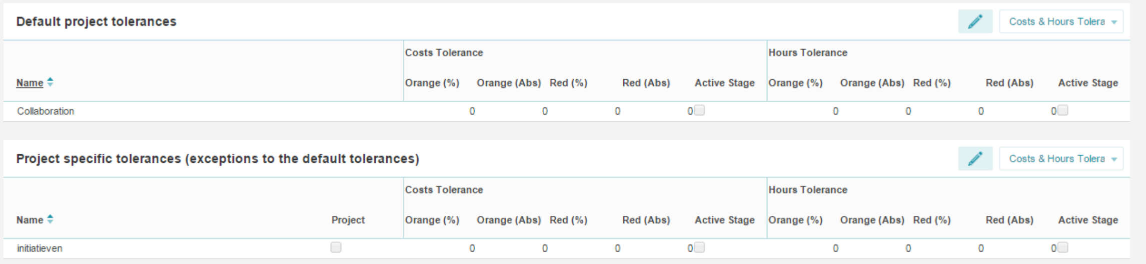
In the 'folder and project tolerances' window, you can set tolerances for the following four categories.

- 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 folder. 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 (as can be seen in the image above).

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


Default project tolerances

Costs & Hours Tolera

Name	Costs Tolerance: Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage	Hours Tolerance: Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage
Collaboration	0	0	0	0		0	0	0	0	

Project specific tolerances (exceptions to the default tolerances)

Costs & Hours Tolera

Name	Project	Costs Tolerance: Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage	Hours Tolerance: Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage
initiatieven		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 folder dashboard.

5 Project Management

The Principal Toolbox allows for different project models that provide different approaches to project planning. As of release 6.5, following project models[1] are supported:

- Single Sheet Project 78
- Classic PRINCE2 Project 118
- Generic PRINCE2 Project 78
- Agile Project 124

For help on project planning, tracking etc. please refer to the classic project planning 118. 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 129.

As of release 6.5, the option exists to migrate classic PRINCE2 projects to generic PRINCE2 projects. Please refer to project migration 230 for more information.

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

5.1 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 77).

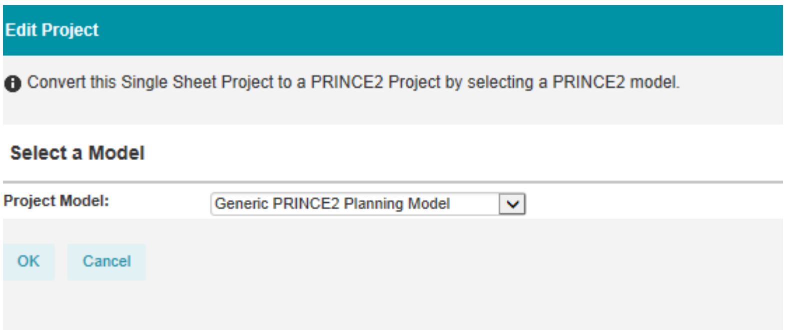
Starting up a new project with the single Sheet Project Model (also referred to as SSP Model):

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.

Project Reporting
The project is now available on the folder 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 portfolio reporting 52 for more information.

Note that the Single Sheet Project also allows for basic document management, see document management 32.

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.



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 77 for more information.

5.2 Generic PRINCE2 Project

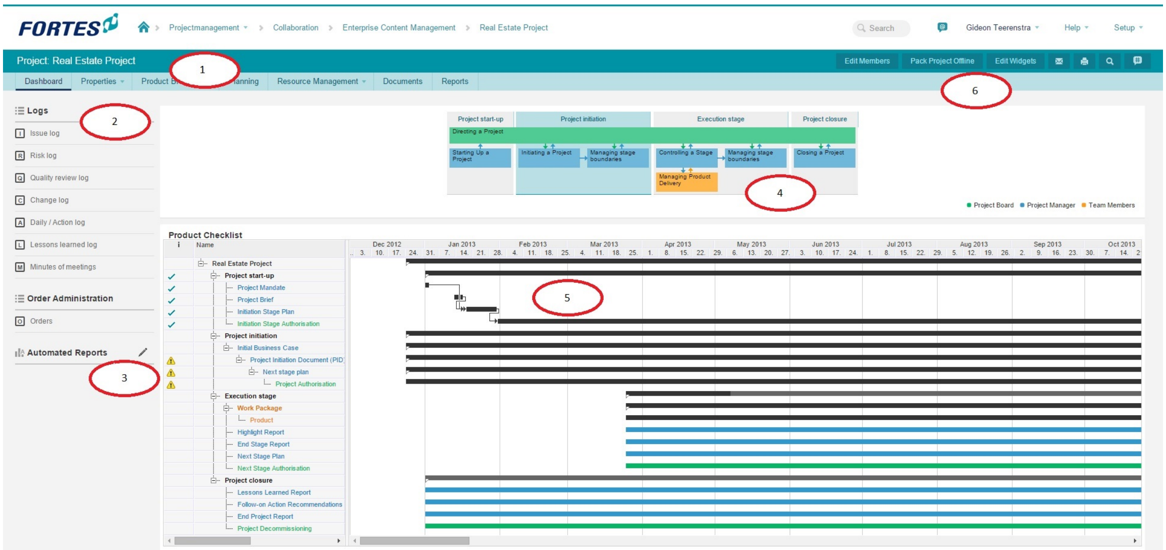
The generic PRINCE2 project allows for a strict planning according to the PRINCE2 project management methodology. It does not allow for activity planning, only stages, work packages and products are supported.

The next sections provide information on using the project:
- Project dashboard 79
- Planning a project 82
- Managing a project 99
- Finishing a project 117

Most topics apply to other project models as well.

5.2.1 Project dashboard

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



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 product breakdown 84.
- Planning	:	To set milestones and assign resources to the different products. Overview of the project's hours and cost. Graphical representation of the project products/activities and export functionality to MS Projects (Gantt).
- Resource Management (add-on)	:	When the Resource Management add-on is available, the Project Manager is able to request resources from the organisational unit. 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.

2. Logs
   It gives an overview of the logs 108 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.

3. Automated reports
   A list of all automated reports 174 available within this project.

4. 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.

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

6. 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**').

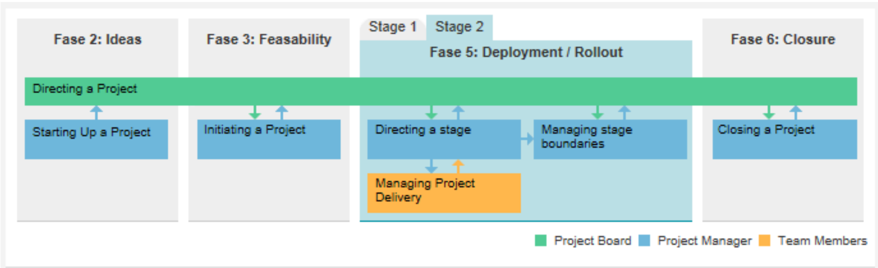
5.2.2 The use of colours within projects

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

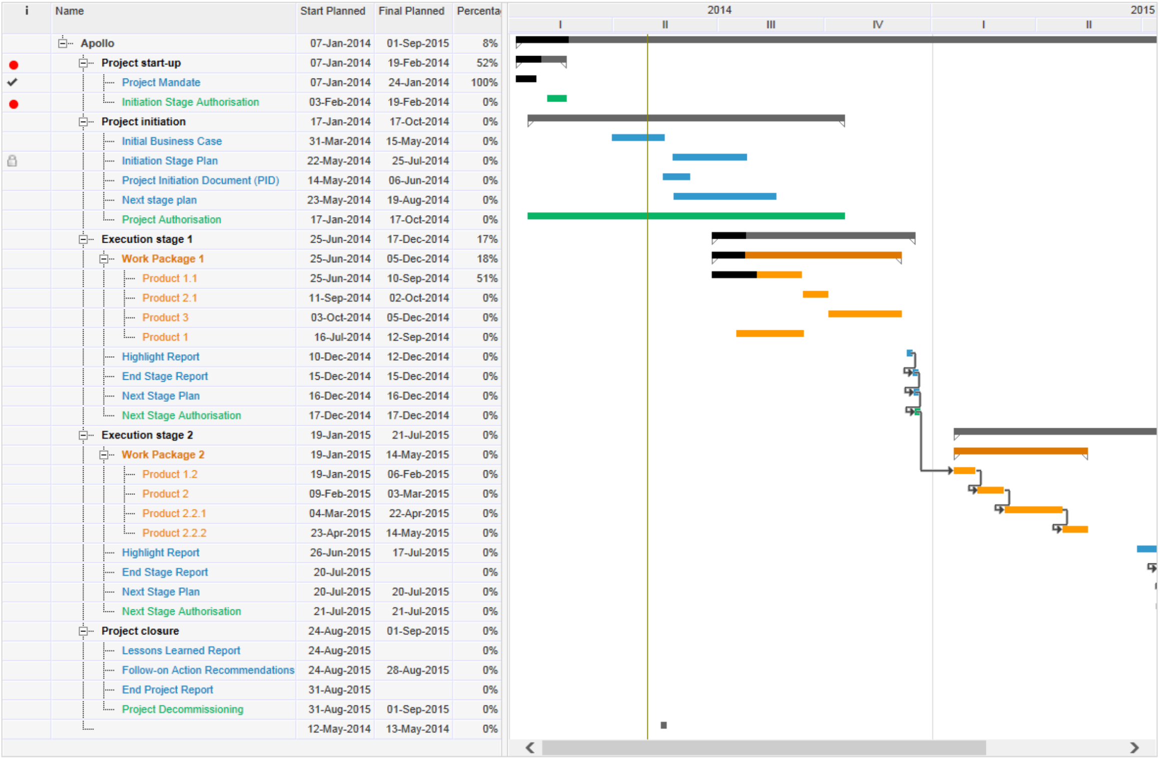
Stage colour
The active stage in your project is coloured yellow, the other stages are grey. It does not mean the other stages cannot be edited, it is an indication and used for filtering purposes in certain views. In the product checklist, stage names are shown in black. On the Gantt chart, stage bars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



Different colours for different planning types

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 use of RAG indicators 27 on folder / project list dashboards is explained.

5.2.3 Planning a project

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

1. Defining a product breakdown structure. 84
2. Defining stages and work packages. 87
3. Planning the milestones of the project. 91
4. Assign responsibilities for products 89.
5. Assignment of budgets (hours and costs). 95
6. Defining dependencies between products. 96

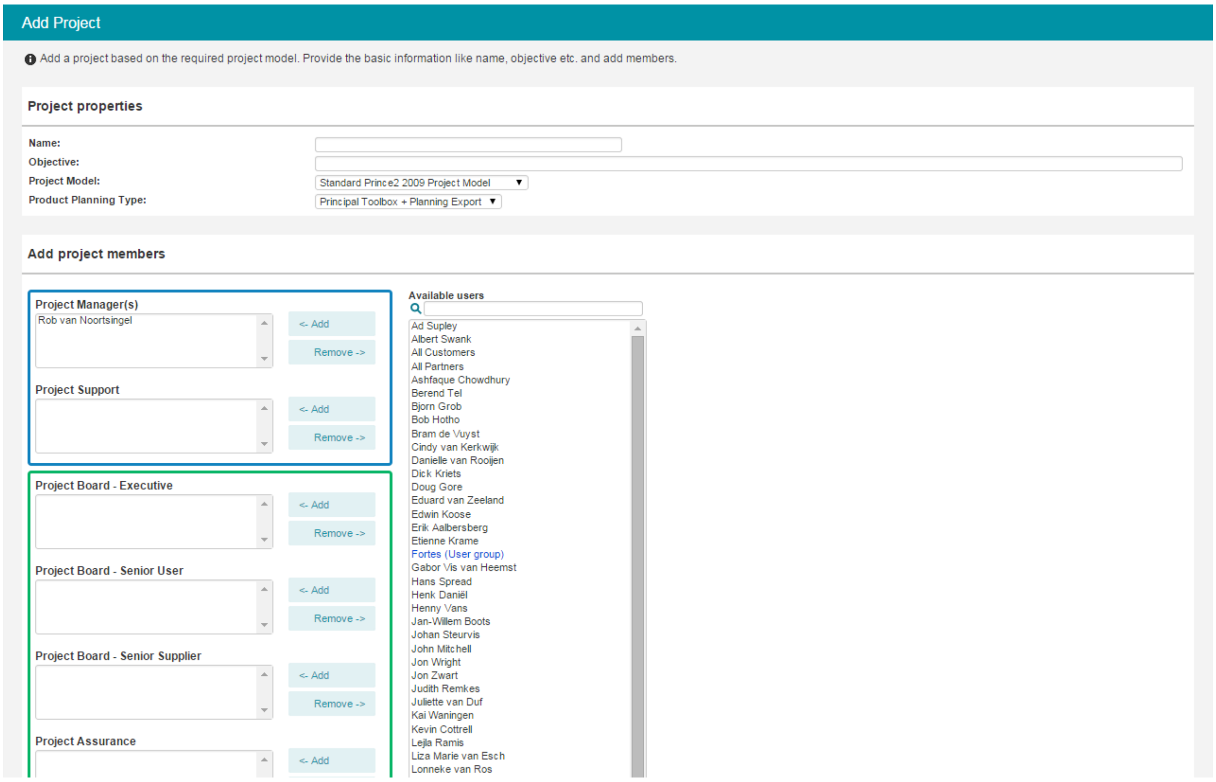
This sequence is just a suggestion. An iterative planning process is always possible; editing your project plan and other data remains possible throughout your project.

5.2.3.1 Creating a project

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

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

2. Click the **+** in the Project listing heading. The window ‘Add Project’ appears.



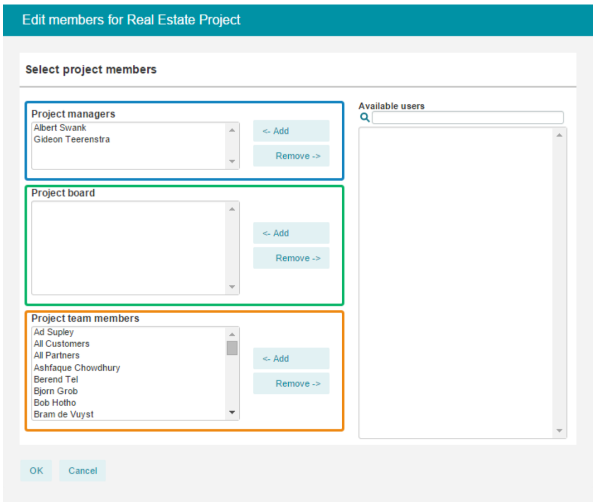
Creating a new project

3. Fill in the appropriate data at ‘Project properties’:

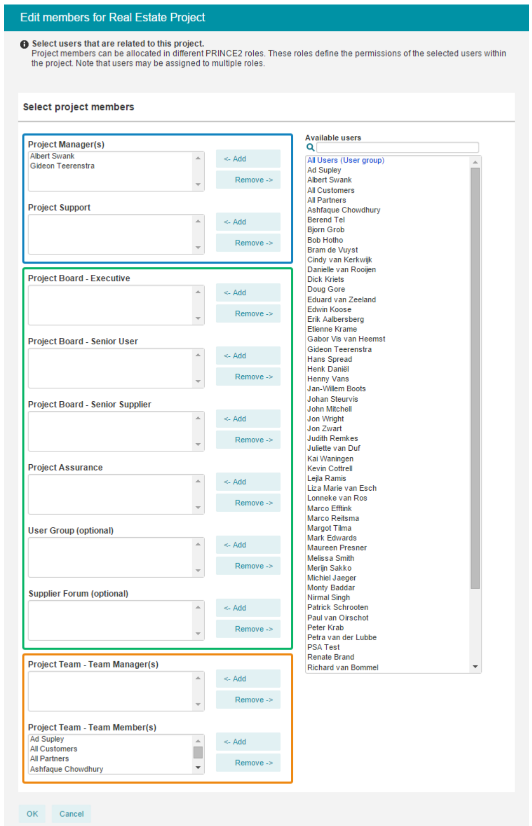
Name	:	Project name
Objective	:	Short description of the project's objective
Project model	:	Select the project model on which the project will be based
Product planning	:	If the add-on Microsoft Project Client Integration is available, you have the choice to plan your project using MS Project. This 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.



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 folder / project list.*

5.2.3.2 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 'Product Breakdown' column on the 'Planning' tab.

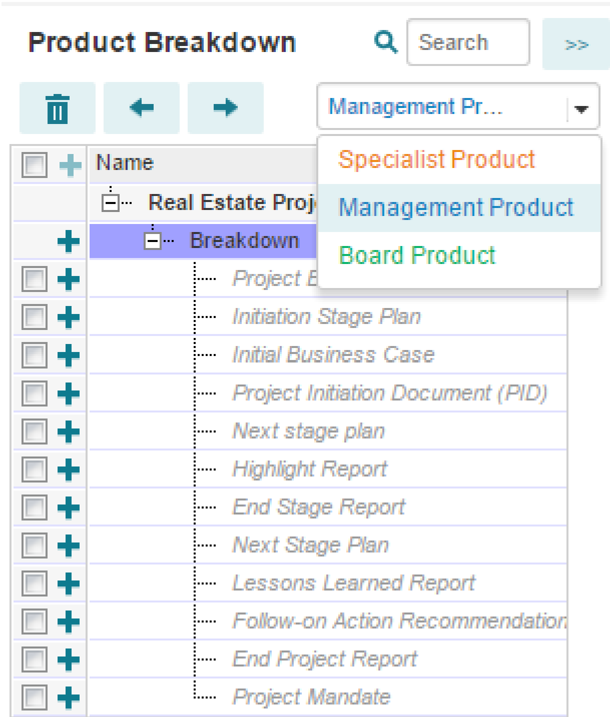
Editing the product breakdown structure - introduction

The Principal Toolbox uses three distinct product types:

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

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

Board Products: use this tab to organize the stock of green coloured board products



Editing the project breakdown structure

Creating new stages / products is done by clicking the '+' on the left hand side of the screen.

***Note:** When creating a new item, the '+' item always creates a child instance of the selected level.*

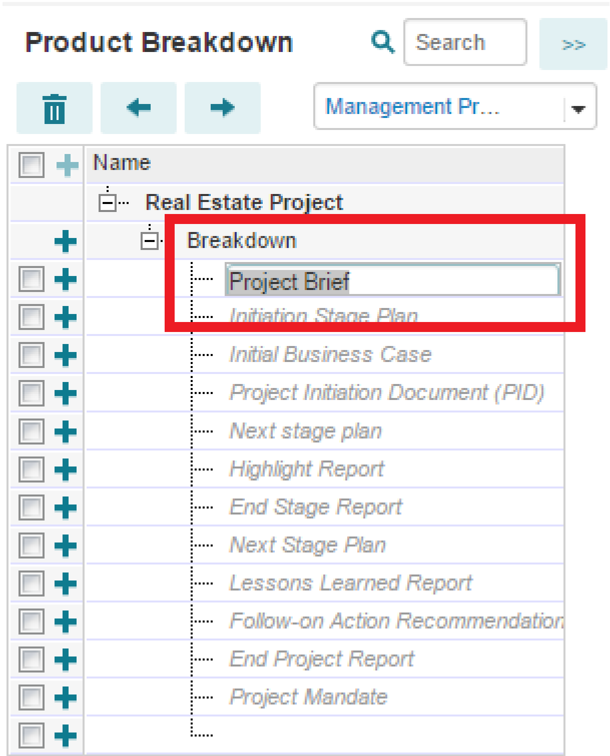
A detailed description of how to create or change the product breakdown is given in the next section.

5.2.3.2.1 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.

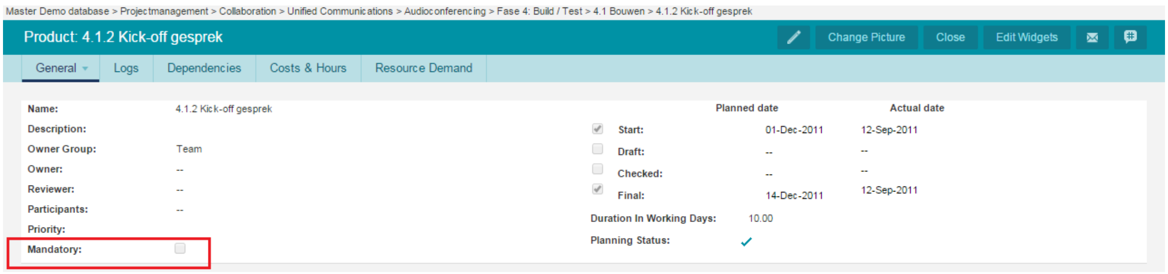
- To rename items, double-click a coloured product and enter the new name in the pop-up.
- To delete products, select the item by selecting the checkbox and click ' '.
- To add products, click '+' and type the name of the item.
- Change the order of products by dragging them to the right position.
- To change the hierarchy, drag the products to the appropriate level. A green arrow indicates at which level you will drop the item.



Renaming an item in the Product Breakdown

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.



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.

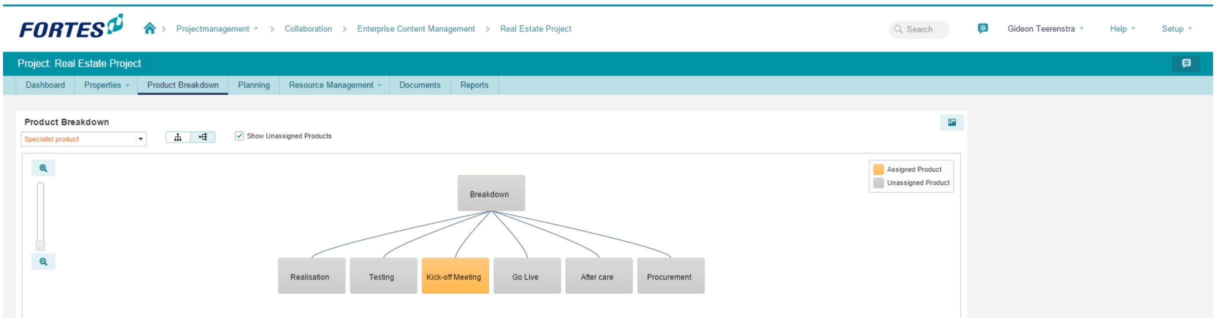
How to assign products to stages and work packages is described in the next sections.

5.2.3.2.2 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 item type (Specialist Product,

Management Product or Board Product) to set the view. A view similar to the view beneath will be shown.



Product Breakdown Structure (Specialist Products)

Products which are not assigned 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 (specialist product), blue (management product) or green (board product).

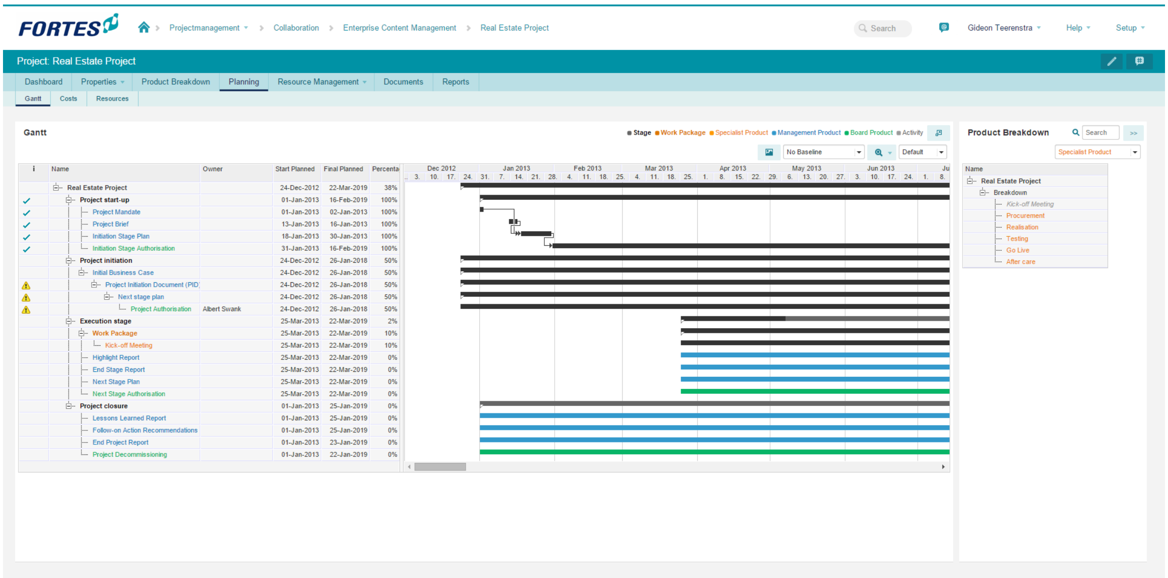
Assigning products to stages and work packages is described in the next two sections.

5.2.3.2.3 Editing stages

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

Stages are edited in the 'Planning' tab. Before starting, go to this tab.

To start editing click .



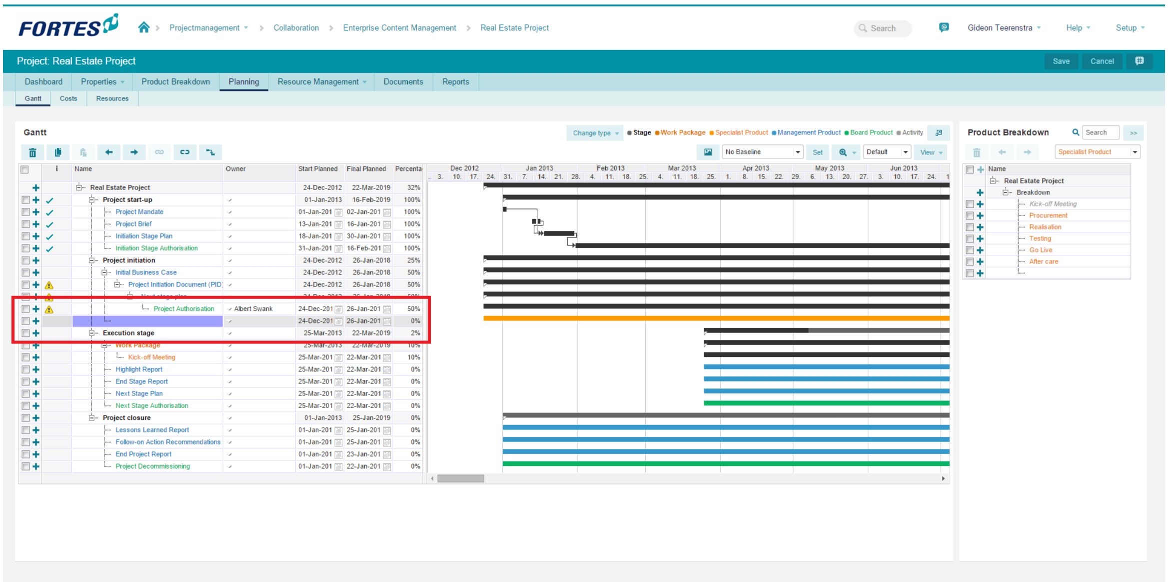
Before editing stages, go to the 'Planning' tab.

Renaming a stage

To rename a stage, double-click its name in the Gantt on the left hand side of the screen.

Adding a stage

To add a stage to your project plan, click the '+' on the appropriate level.



Adding a stage by clicking '+'.

Moving stages

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

Deleting a stage

To delete a stage, click its name and click . If the stage contains products and/or work packages, these will be deleted as well.

5.2.3.2.4 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* 163*).*

Stages are edited in the 'Planning' tab. Before starting any action, navigate to this tab.

Renaming a work package

To rename a work package, double-click its name (in the Gantt on the left hand side of the tab).

Adding a work package

To add a work package to your project plan, click the '+' and add an item.

Next select the item by clicking on it and click and select 'work package'.

Moving work packages

To move a work package, click its name and drag it to the right position. Check the arrow indicating where the work package will be positioned.

Deleting a work package

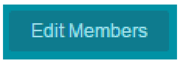
To delete a work package, click its name and click . If the work package contains underlying items, these will be deleted as well.

5.2.3.2.5 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.

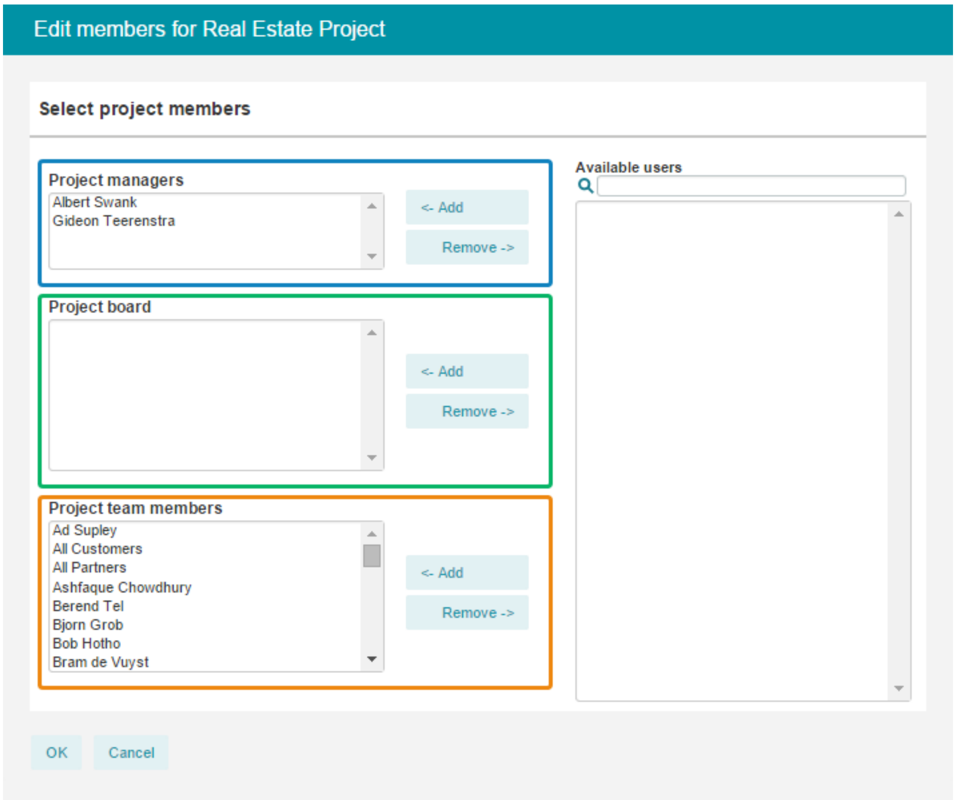
Assemble your project team

1. Go to the '**dashboard**' tab of your project.

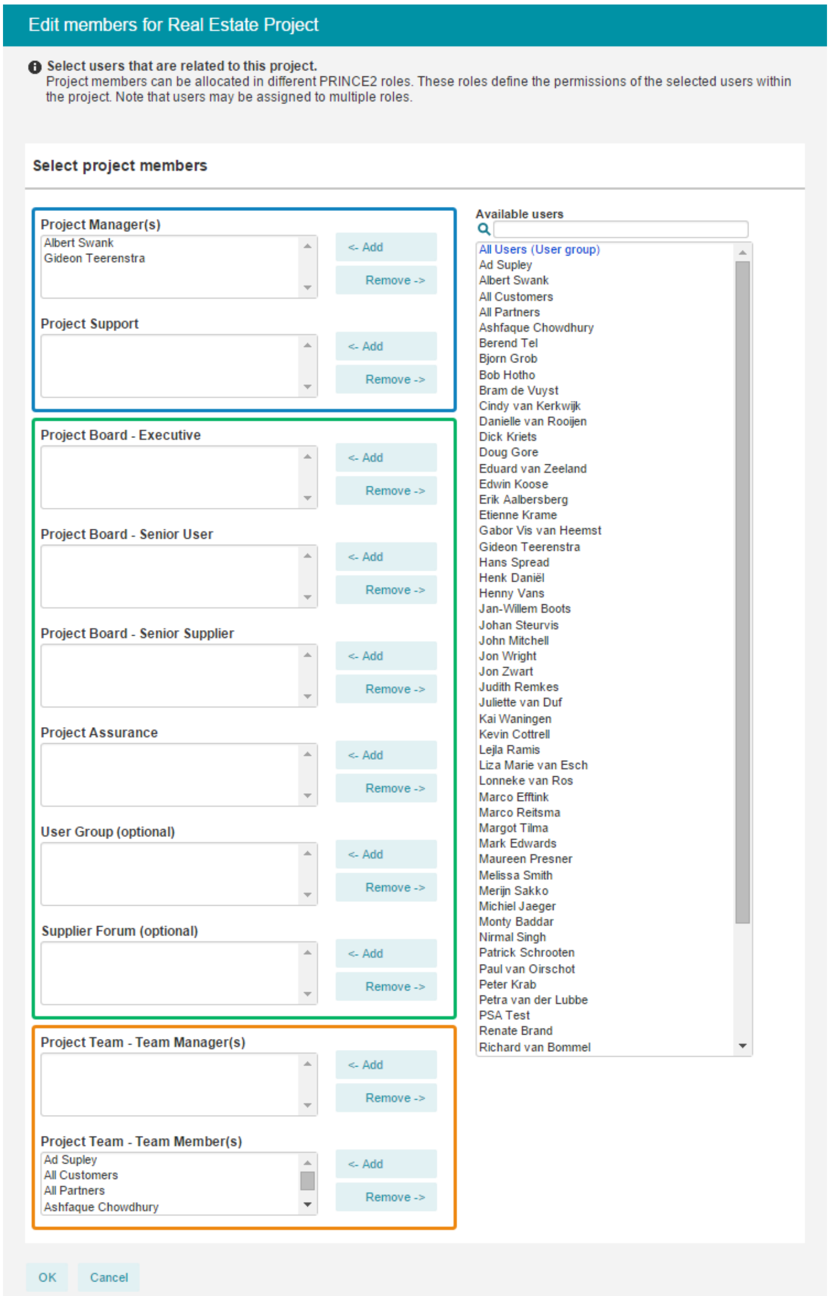
2. Click 

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's configuration, 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.



Edit members; setting 'limited set of roles'

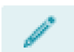


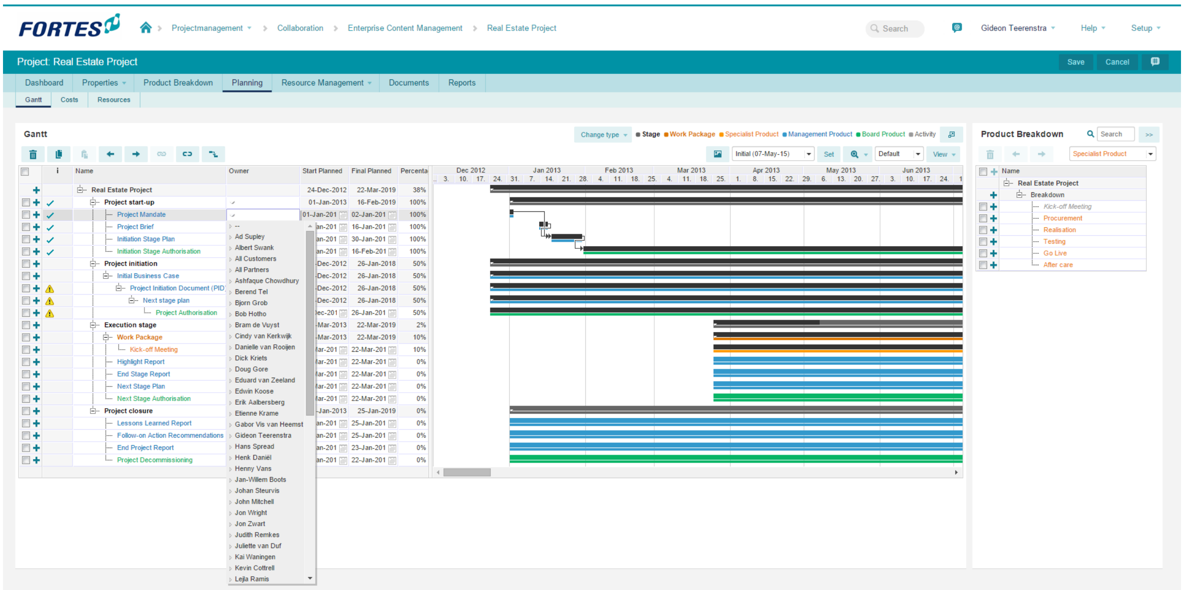
Edit members; setting 'full set of PRINCE2 roles'

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

Assign products to owners

1. Go to the '**Planning**' tab.

2. Click  and select the owner property of the product to assign a product owner.



Plan tab

5.2.3.3 Planning product milestones

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

- Start: set the date work has to start on the product
- Final: the planned date for delivery of the final version of the product.

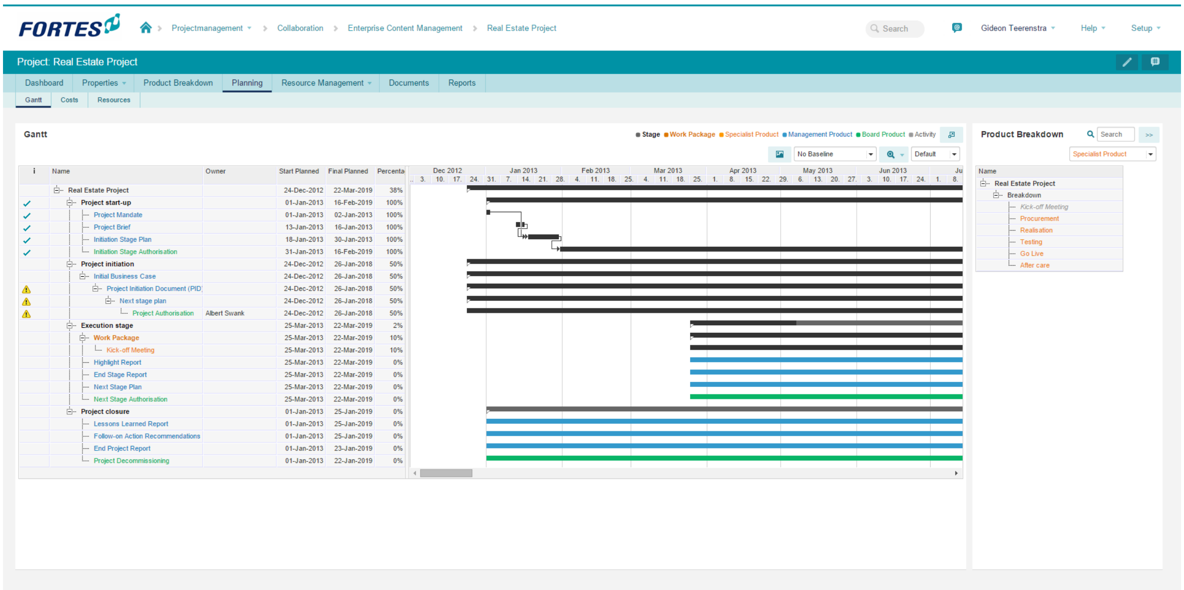
Planning the milestones within the project can be done on the Gantt chart 91. Use the Gantt chart editor with ‘drag & drop’ functionality.

5.2.3.3.1 Using the Gantt editor

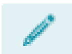
A Gantt chart shows a timeline of your product with the product milestones. Because Gantt charts are simple to understand and easy to construct, they are often used by project managers.

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

1. From inside your project, click the 'Planning' 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.



Gantt

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

> ***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.

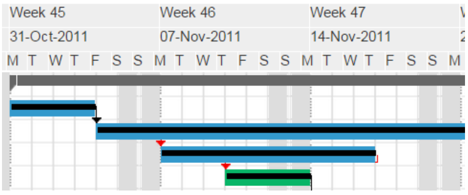
4. First of all you need to define the start date of your project. For more information in starting your project and adding items to your project see editing stages 87 & editing work packages 88.

5. Set the date of the first product in every stage or work package by dragging this to the planned start date or use the button shown above. All products in this specific work package or stage will be moved automatically to this date.

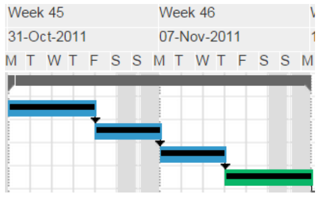
6. The next step is to plan the products in this specific stage or work package individually:
   a. To move the product forwards or backwards in time you need to place the cursor in the centre of the product bar, hold the left mouse button down and drag it to the correct position.
   b. To alter the duration, you need to place the cursor on one of the sides of the product time-bar and drag the side in the desired direction.

7. To define 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 defining dependencies 96. To delete a dependency use **Remove dependency**. Buttons:
   

8. If dependency conflicts exist in your planning you can use the **Solve conflicts button**: . Select the products you want to be recalculated and click the button.



Before: dependency conflict



After: problem solved

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

11. As of version 7.5 it is possible to highlight the critical path. To do this click '**Edit**', next click '**View**' and select '**Show critical path**'.

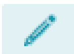
> ***Note**: inconsistencies or conflicts resulting from mutually depending products are indicated by coloured indicators. For their meaning, consult the use of colours in projects* 80*. For more help on dependencies, see defining dependencies* 96*.*

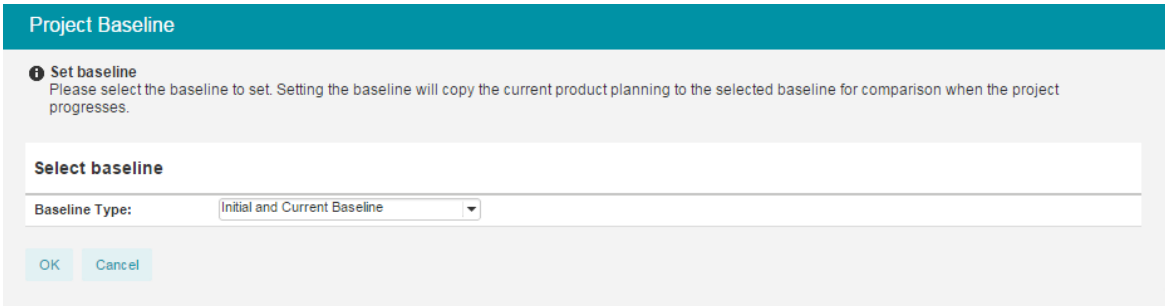
5.2.3.3.2 Baseline support

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.

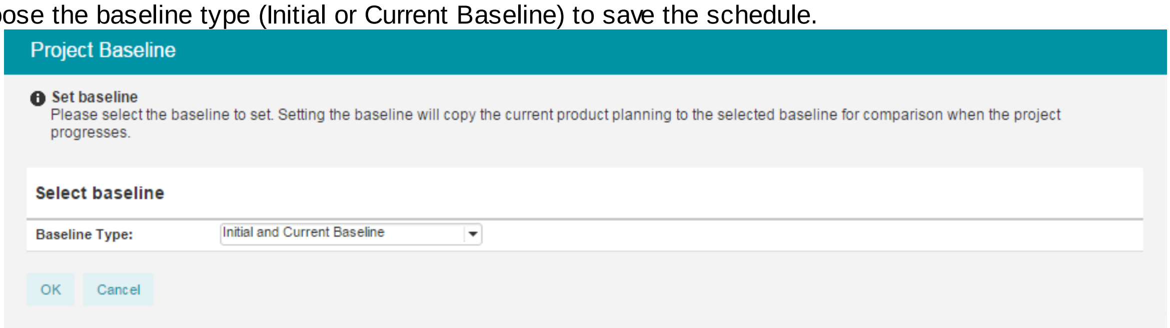
Setting the baseline will copy the current product planning to the selected baseline for comparison when the project progresses.

Set Baseline
In the 'Planning' tab, sub tab 'Gantt' you are able to set a baseline.

To set a baseline click  and click 'Set'.
This saves the current Gantt chart as the baseline for the project.



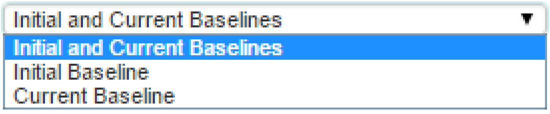
Choose the baseline type (Initial or Current Baseline) to save the schedule.



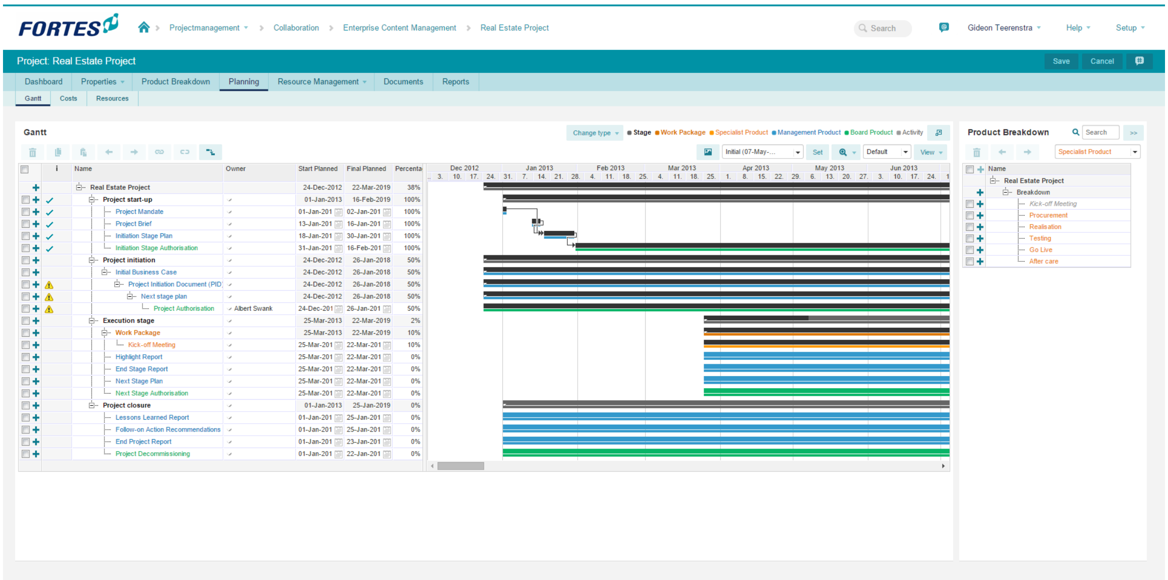
Setting a baseline

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.



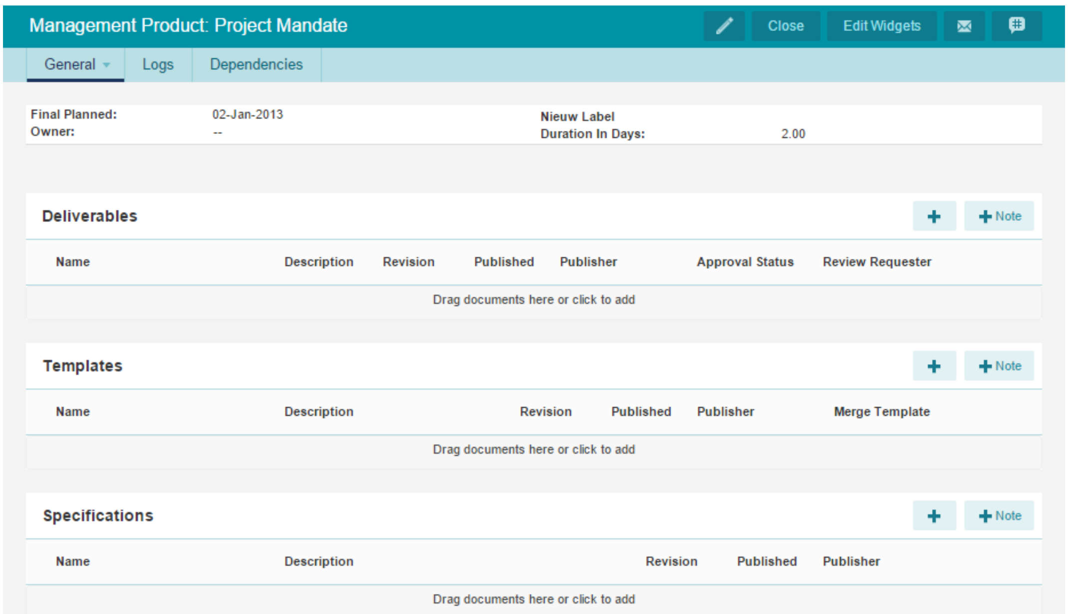
Selecting a baseline



Baselines on the Gantt

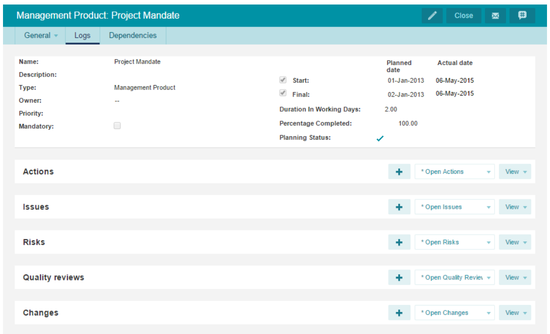
5.2.3.4 Product page

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.

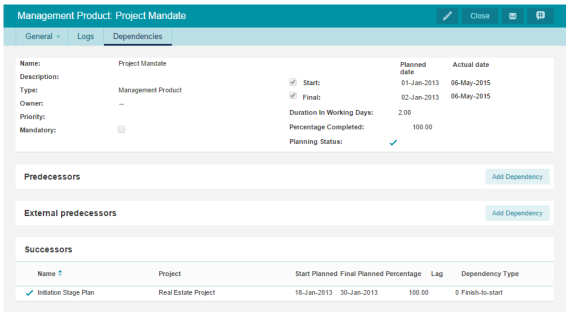


Product page

On the ‘Product page’ there are some extra tab pages: Logs, Dependencies and Costs & Hours (not shown). The Logs tab allows you to register items such as: issues, risks and quality review 108. On the Dependencies 96 tab you can define dependencies between products to create a product flow.



Logs tab



Dependencies tab

5.2.3.5 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 planning products 163). 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.*

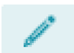
For the registration of both costs and hours, five types of registration are available:

- 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

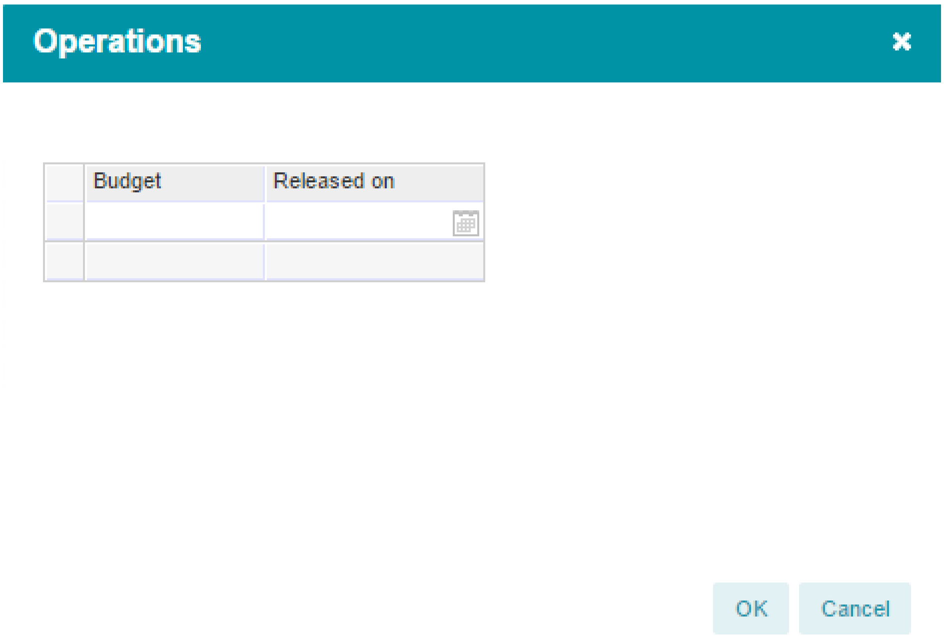
Below you'll find the steps to set the budget for your project.

1. Go to the **'Planning'** tab.

2. Sub-tab '**Costs'**.

3. Click  and then double click the financial category that you want to assign a budget too.

4. Set the budget and the release date and click 'OK' to set the budget.

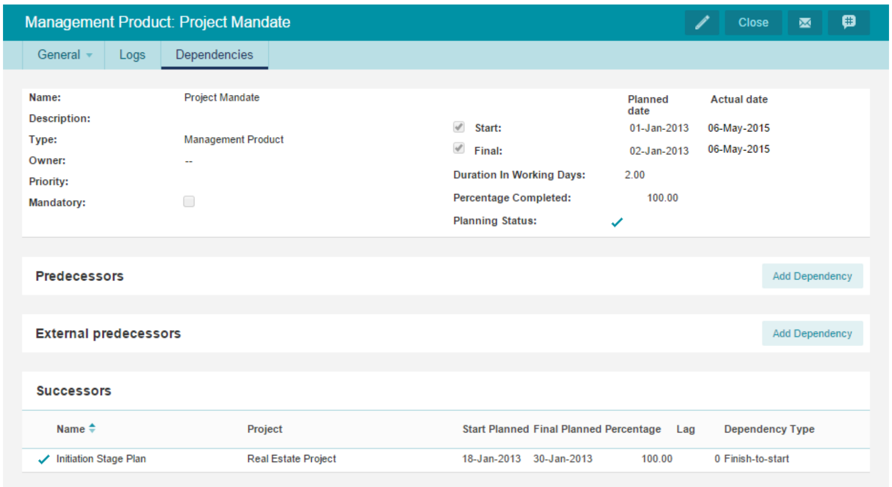


Assign a budget to Operations

5.2.3.6 Defining dependencies

The easiest way to define dependencies within your project is by using the editable Gantt [91]. 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 or planning) and go to the 'Dependencies' tab.

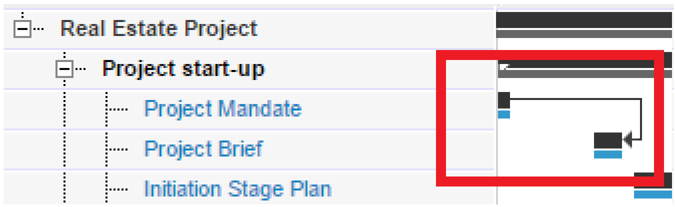
1. Click the name of the product you want to create a dependency for, and select the tab **'Dependencies**'.



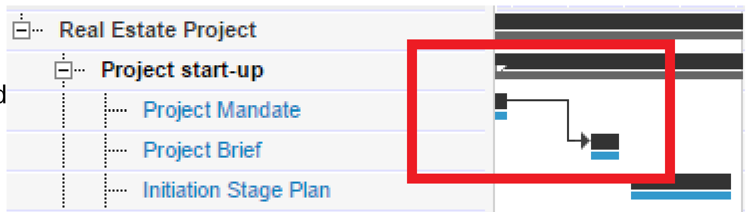
Dependencies tab in the product detail window

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

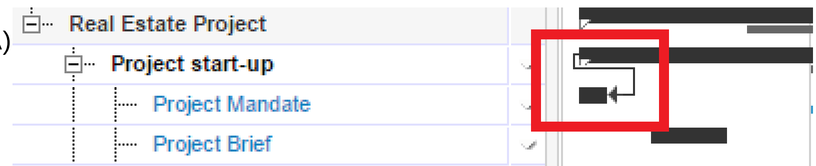
Finish-to-finish: Product (B) cannot be finished until product (A) has been finished. For example, if you have two products, "Wiring" and "Installation inspected", "Installation inspected" cannot be finished until "Add wiring" has been finished.



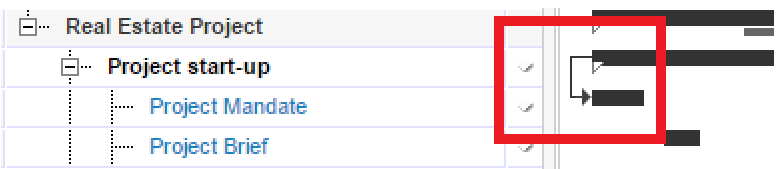
Finish-to-start: Work on product (B) cannot start until product (A) has been finished. For example, if you have two products. "Constructed fence" and "Painted fence", "Painted fence" cannot be started until "Constructed fence" has been finished. This is the most common type of dependency.



Start-to-finish: Product (B) cannot be finished until work on product (A) has been started. The Predecessor must be started before current product can finish.



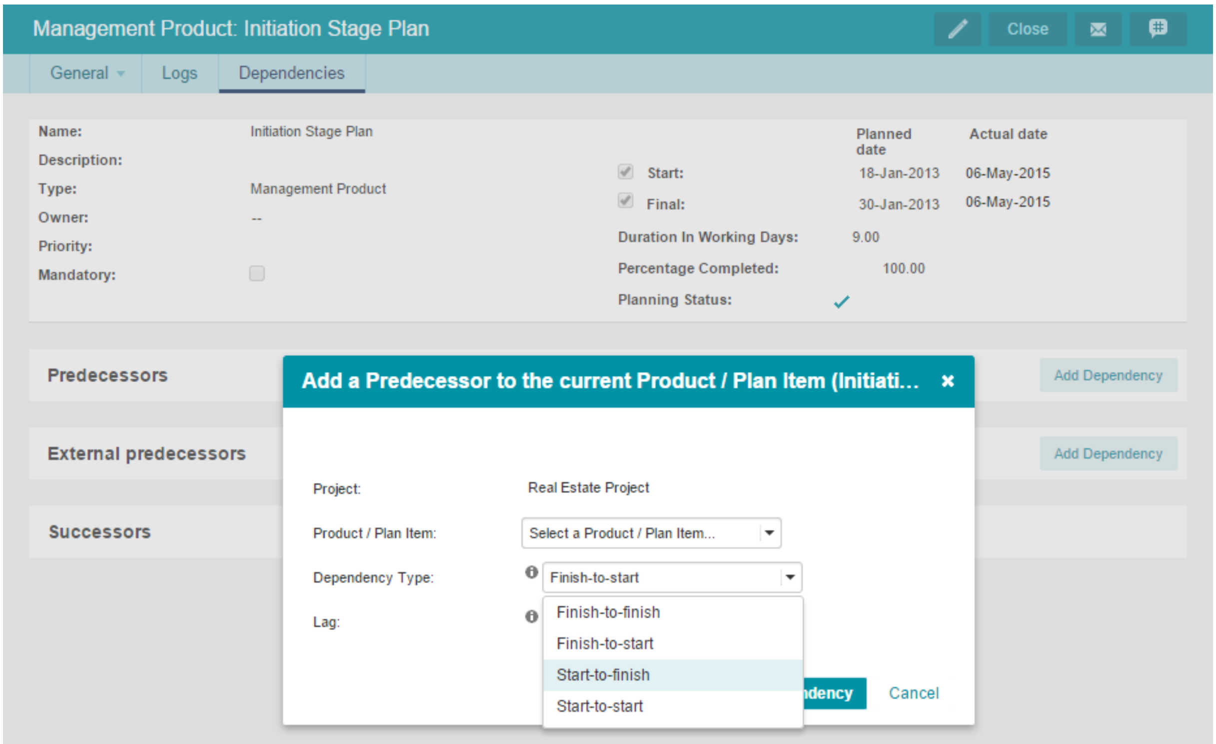
Start-to-start: Work on product (B) cannot start until work on product (A) starts. For example, if you have two products, "Foundation poured" and "Concrete leveled", "Concrete leveled" cannot begin until "Foundation poured" begins.



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.*

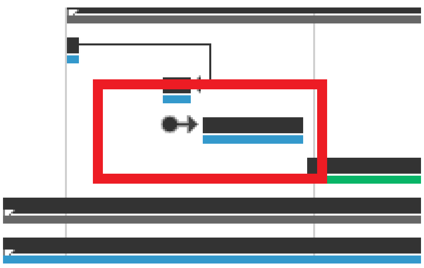
4. The type of the dependency and the lag (delay) can be modified on the main page. Lag is a delay between products that have a dependency. For example, if you need a two-day delay between the finish of one product and the start of another, you can establish a finish-to-start dependency and specify two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



Adding a dependency

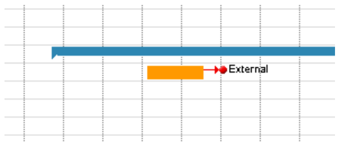
The relationships are verified based on the start and end date of the products. If an end date of a ‘Predecessor’ is delayed or planned later than the start date of the ‘Successor’ and the relation is defined as; Finish-to-Start, a blue traffic light is shown to indicate a problem.

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 folder manager can see bottlenecks in the execution of the folder.

See the screenshots below:



Dependencies on the folder Gantt

5.2.3.7 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.

How a Project Manager requests resources for his project and how a he or she requests resources van be found at ['Requesting resources within a project'] 162.

> ***Note:*** *To be able to request and allocate resources, the Resource Alloc2ation module needs to be available!*

5.2.4 Managing a project

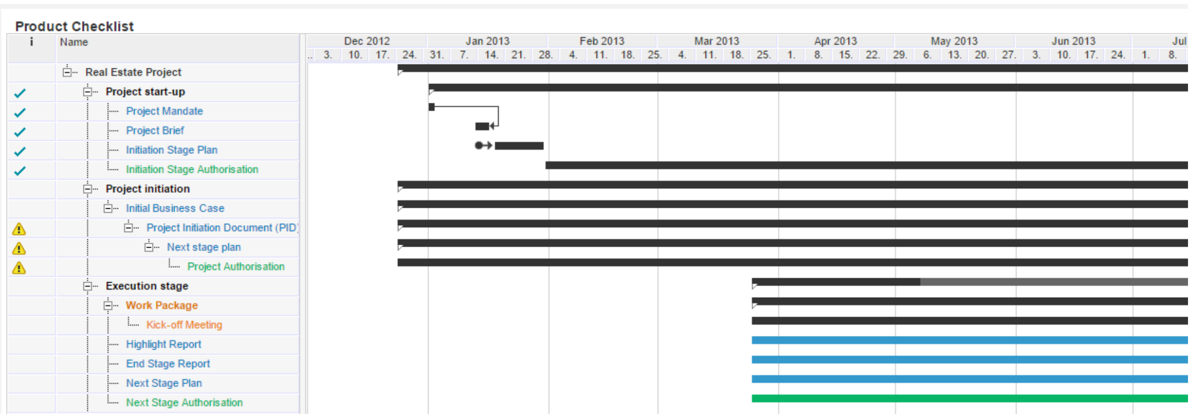
During the execution of a project the defined products are to be realised. In this section you will find:

- How to monitor and enter progress.
- How to communicate with the 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.

5.2.4.1 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 Gantt chart;

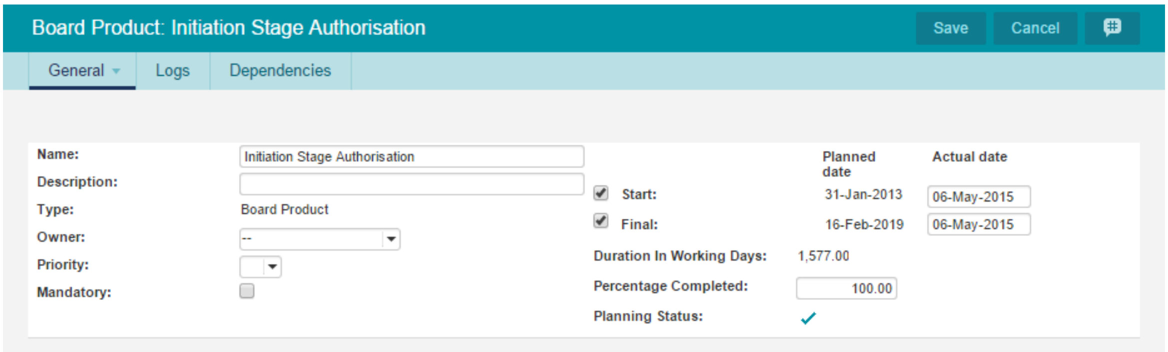


Planning on the Gantt chart

- 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.
- Finished products are marked with a tick (✓) and the solid bar indicates when the product actually has been finished.

To report progress you do the following:

1. Go to the '**Project Dashboard**'.
2. Click the name of the product to view the **'Product page**'.
3. To change the planned date, select the date and enter the new date in the calendar.
4. To register passing of milestones, tick the checkbox for Start/Draft/Checked/Final. The date will be set to today by default, alternatively enter another date in the column 'actual date'.



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.

5.2.4.2 Registration of actual hours

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

- With time entry is available check 'Time Entry [133]' for more information about possible configurations.
- Without time entry refer to 'Order Administration [131]' to manually register actual hours.

5.2.4.3 Reporting

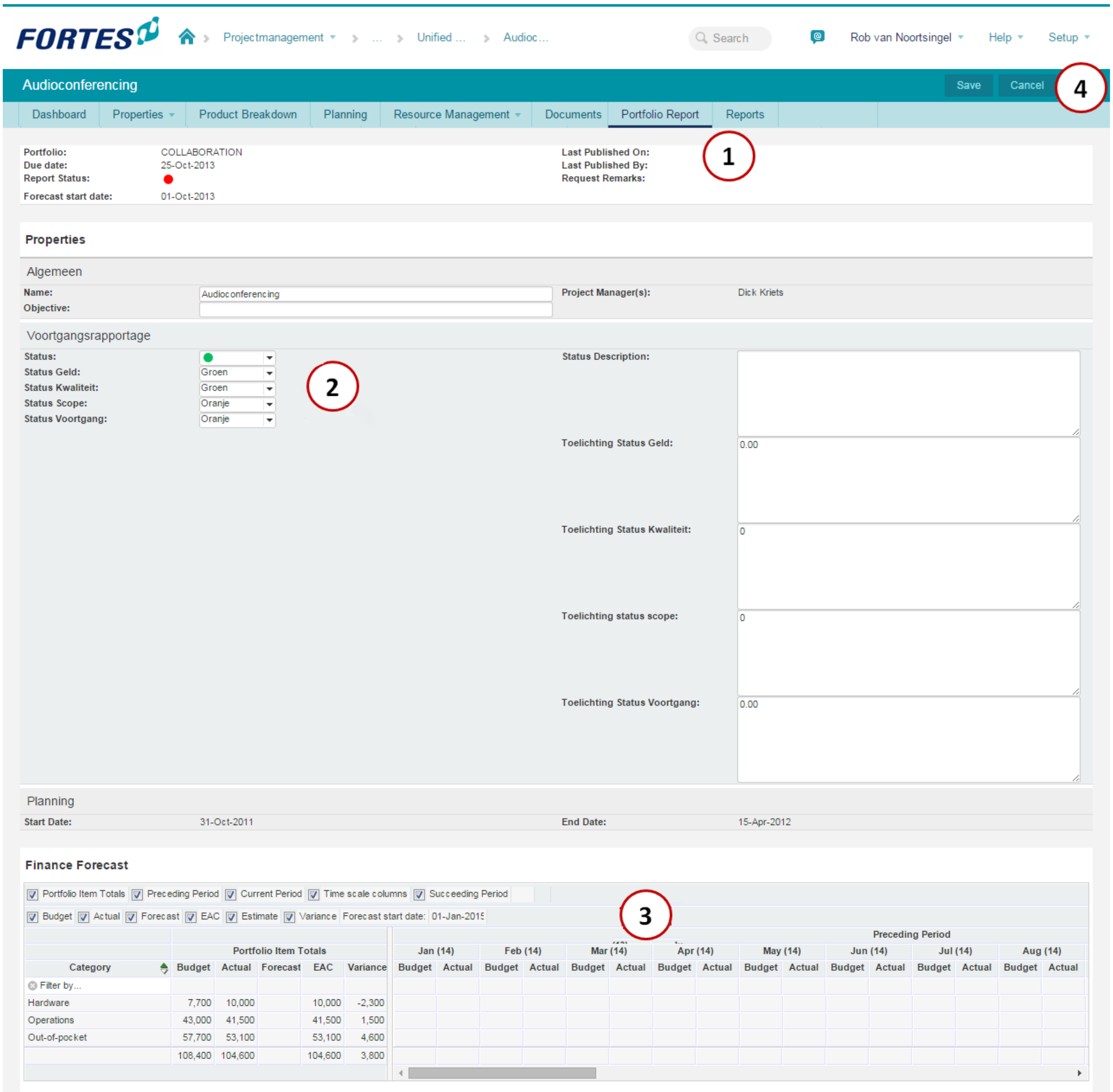
Within the Principal Toolbox you can make progress information available and generate reports. In this section the various options will be presented.

5.2.4.3.1 Portfolio reporting (add-on)

Note: Portfolio reporting is only available when the Portfolio Management add-on has been installed.

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



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

2. Update the editable fields with the latest information.

3. Update financial information (if requested).

4. Then press the "**Publish to Portfolio**" button to send the information off to the portfolio.

5.2.4.3.2 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.

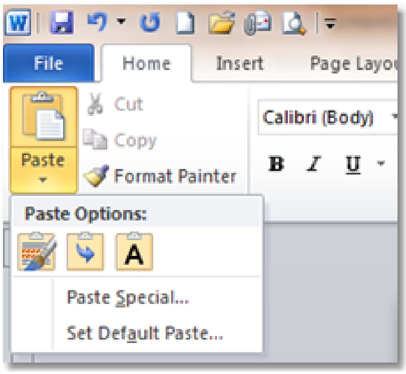
Copy to clipboard 

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.

Save list as XLS

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.

5.2.4.3.3 Generating automated reports

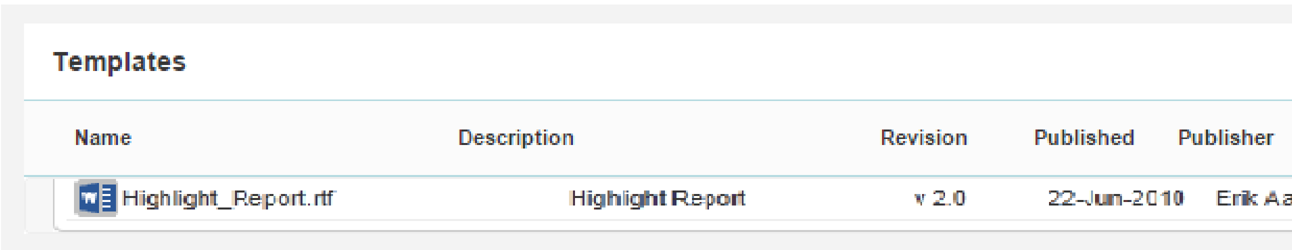
The Principal Toolbox has extensive report functionality available. These reports come either as RTF-files (readable by all text processors, like Word) and Microsoft Excel files.

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.

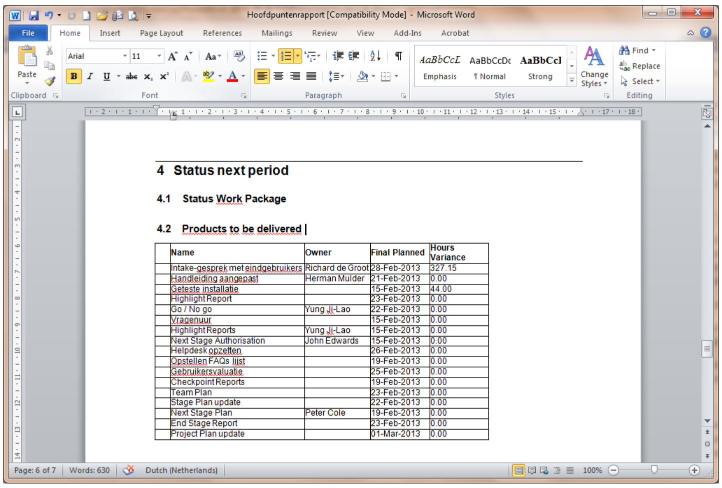
On the Project Dashboard



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, Adding documents 104).



4 Status next period

4.1 Status Work Package

4.2 Products to be delivered

	Name	Owner	Final Planned	Hours Variance
	Intake-gesprek met eindgebruikers	Richard de Groot	28-Feb-2013	327.15
	Handleiding aangepast	Herman Mulder	21-Feb-2013	0.00
	Geteste installatie		15-Feb-2013	44.00
	Highlight Report		23-Feb-2013	0.00
	Go / No go	Yung Ji-Lao	22-Feb-2013	0.00
	Vragenuur		15-Feb-2013	0.00
	Highlight Reports	Yung Ji-Lao	15-Feb-2013	0.00
	Next Stage Authorisation	John Edwards	15-Feb-2013	0.00
	Helpdesk opzetten		26-Feb-2013	0.00
	Opstellen FAQs lijst		19-Feb-2013	0.00
	Gebruikersvaluatie		25-Feb-2013	0.00
	Checkpoint Reports		19-Feb-2013	0.00
	Team Plan		23-Feb-2013	0.00
	Stage Plan update		22-Feb-2013	0.00
	Next Stage Plan	Peter Cole	19-Feb-2013	0.00
	End Stage Report		23-Feb-2013	0.00
	Project Plan update		01-Mar-2013	0.00

See Automated reports 174 for more information

5.2.4.4 Document management and approval

You can store documents at various locations within the Principal Toolbox. The Principal Toolbox will keep the documents in the database, so it will be available to all users with access to the documents 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.

5.2.4.4.1 Adding documents and templates to products

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

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

1. Go to the ‘Product page’.

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

Description	:	Description of the document.
Revision/Doc nr.	:	Document version.
Filename	:	Select a document with the ‘Browse’ button or, alternatively
Internet address	:	Fill in a hyperlink.
Internal document link	:	Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the 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. 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"*
> - *links to document locations look like: "file://p:\documents\example.doc"*
>
> *When using links to document locations, make sure all users have the same drive mapping.*

5.2.4.4.2 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:

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

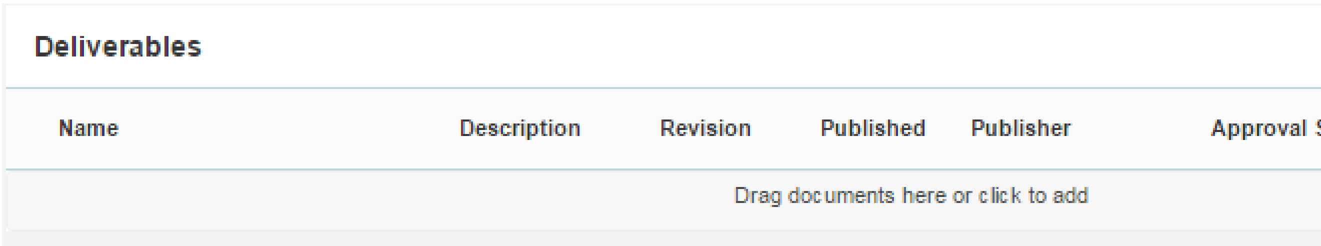
3. Select the document concerned and click **Show History** in order to show a list of all the former versions of the document. Remove other versions by using the ‘**Remove**’ button.

5.2.4.4.3 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.

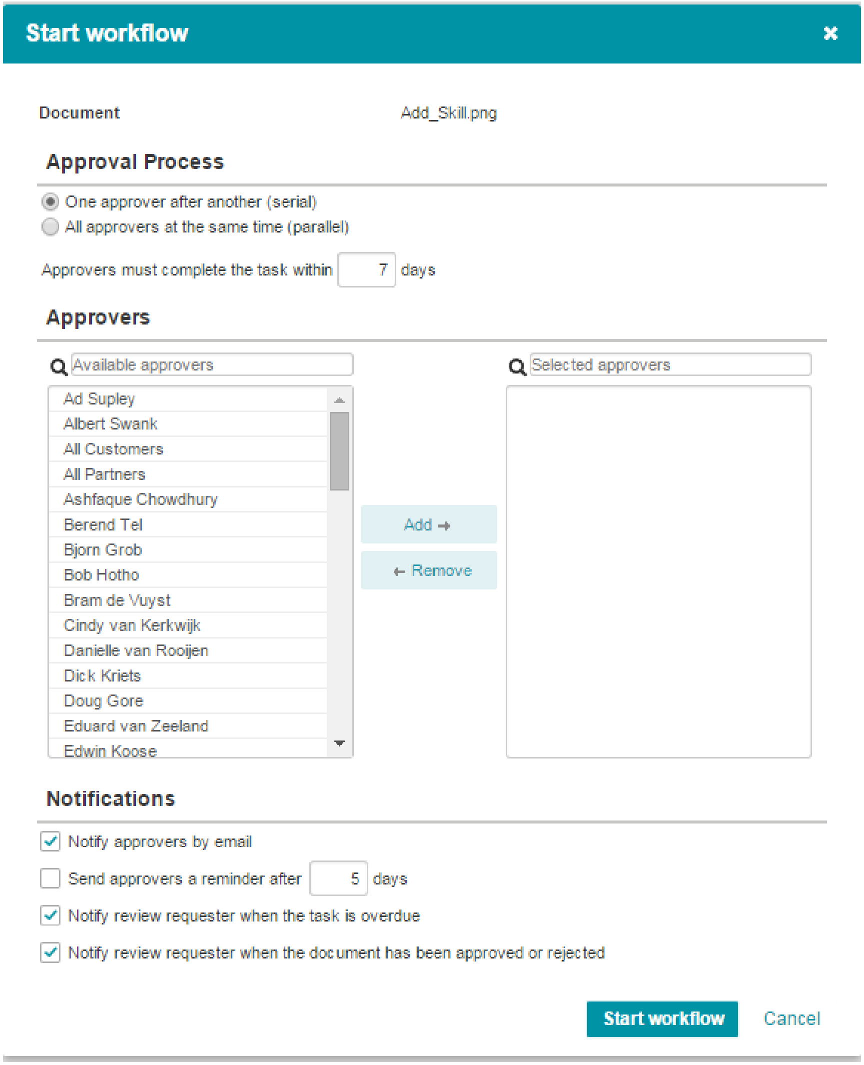
1. Go to the 'product page' of a product.

2. Click **+** or **+ note** at Deliverables to insert a specific deliverable.



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**’.

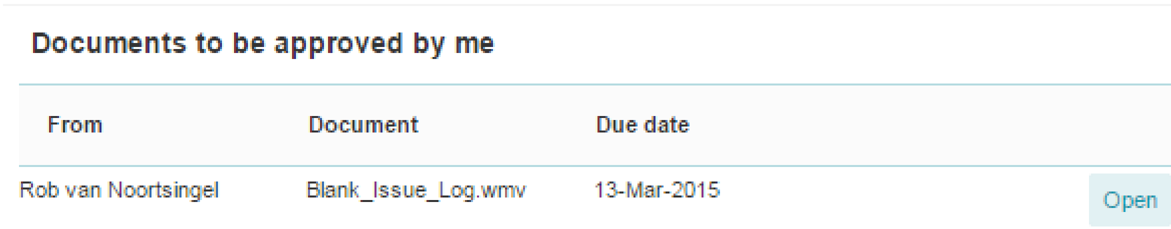


Requesting approval

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

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.



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

. 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.

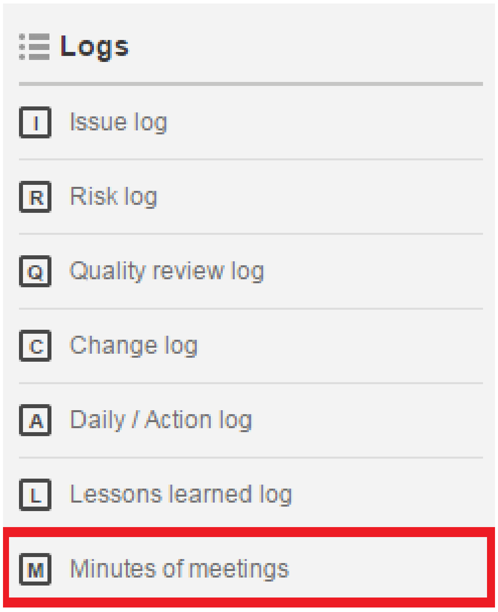
5.2.4.4.4 Adding minutes of meetings

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

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

1. Go to the ‘**Project dashboard**’

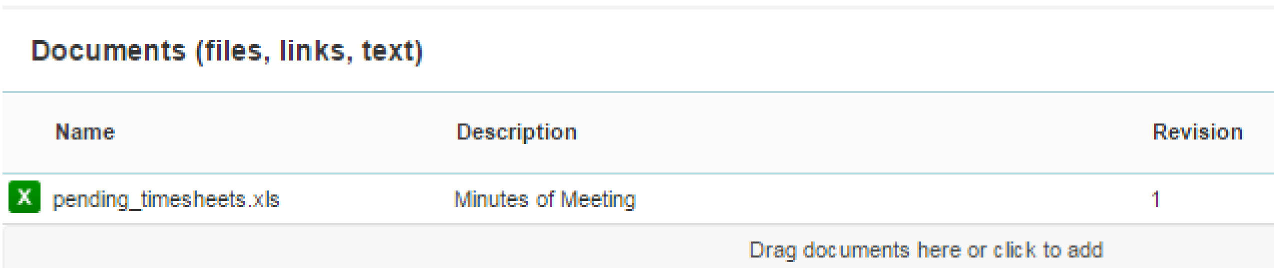
2. Select ‘**Minutes of meetings**’ under the logs.

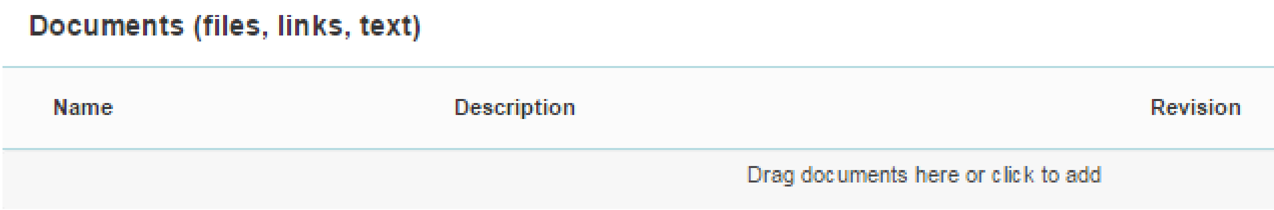


Logs

3. Using ‘**+**’ you can add the minutes of the meeting, with ‘**+ 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 Updating a document 104).





Minutes of meetings

5.2.4.5 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.

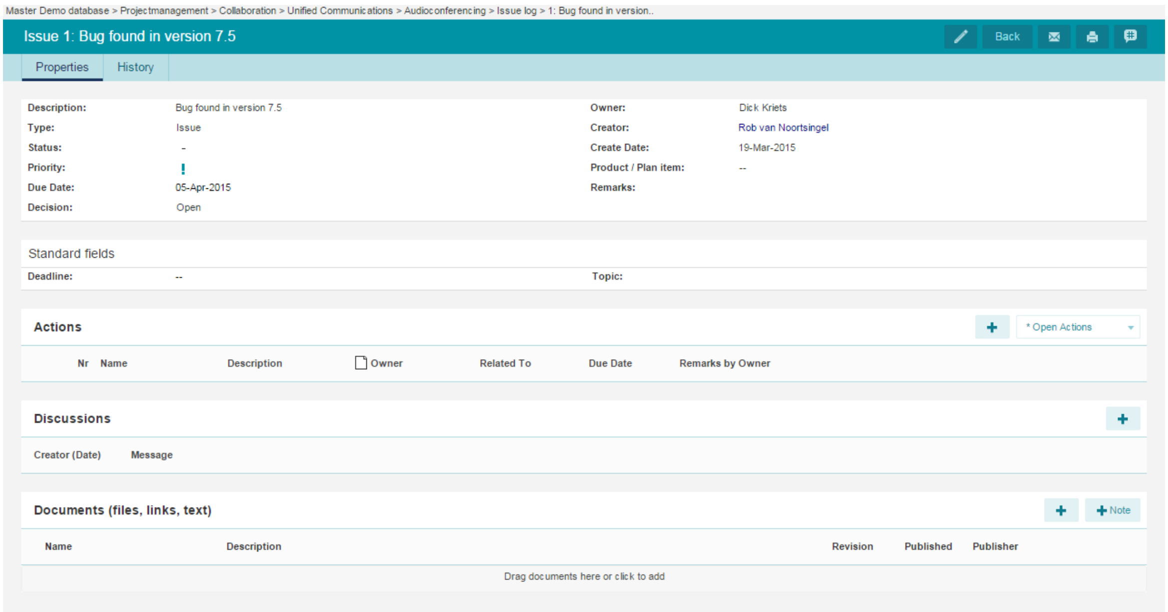
On all logs custom fields can be defined with the add-on 'Custom fields' 220. Only the basic functionality is explained in the manual. The logs available within the Principal Toolbox, are

- Issue log 109
- Risk log 110
- Quality review log 111
- Change log 113
- Daily / Action log 114
- Lessons learned log 115

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.*

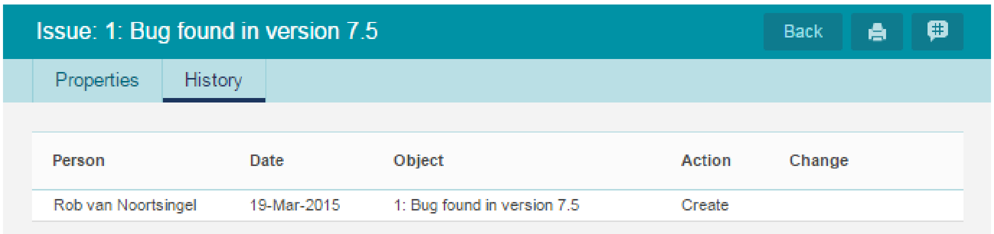
Note*: As of release 7.0, it is possible to define a custom page layout on all log items. Such a page layout is defined in the project model.*



Adding an issue

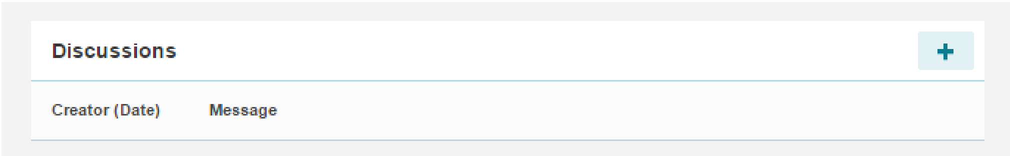
History log

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



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.



Here you are able to start a new discussion

5.2.4.5.1 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.

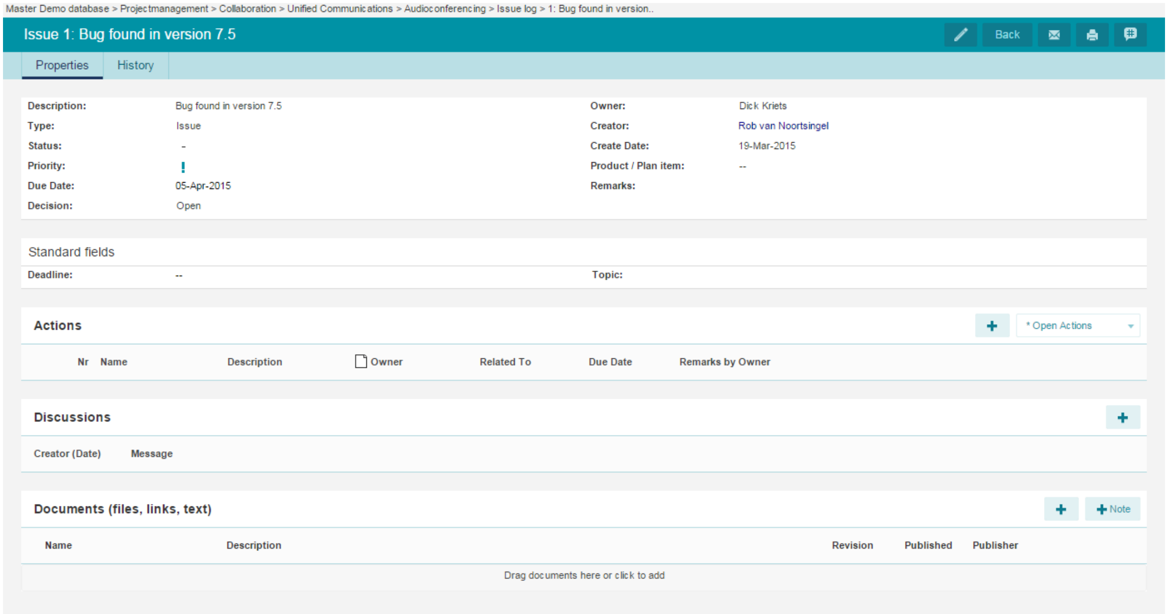
1. Go to the summary page of a product.

2. Now click the tab '**Logs**'.

3. Click '**+**' in the blue 'Issue listing' bar. Then fill in the following information:

Description	:	Give a description of the issue.
Type	:	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 '**+**' or '**+ note**' you can add important documents/notes on to the issue.



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 folder or project, you can use the **'Copy'** and **'Move'** buttons: 

. With copy, you create a duplicate issue within your own project. With the move button, you can select another project or folder 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 '✔' button.

> ***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.*

5.2.4.5.2 Risk log

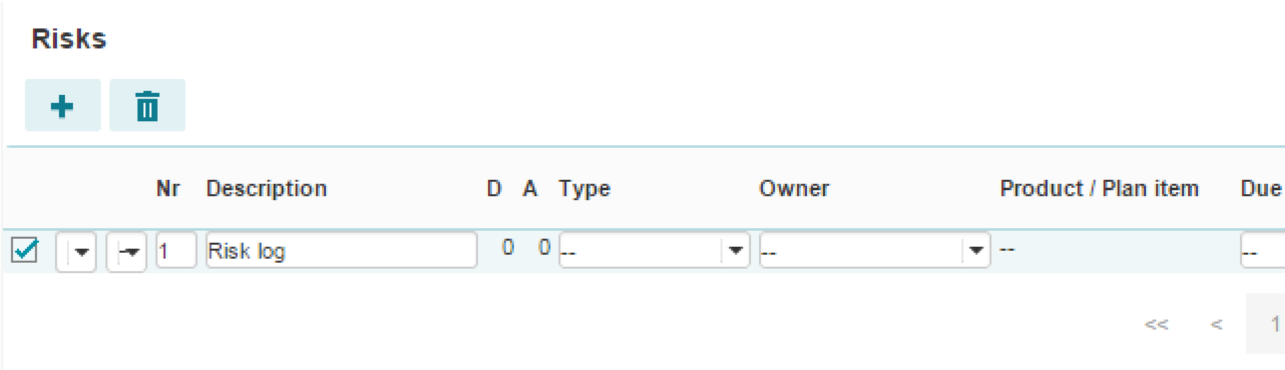
The risk log is a central place where risks are identified, described and where certain decisions and actions are taken.

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 '**+**'. Then fill in the following information:



Description	:	Give a description of the risk.
Type	:	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 '**+**' behind 'Risk listing.

6. By clicking '**+**' or '**+ 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 folder 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 folder 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.*

5.2.4.5.3 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).

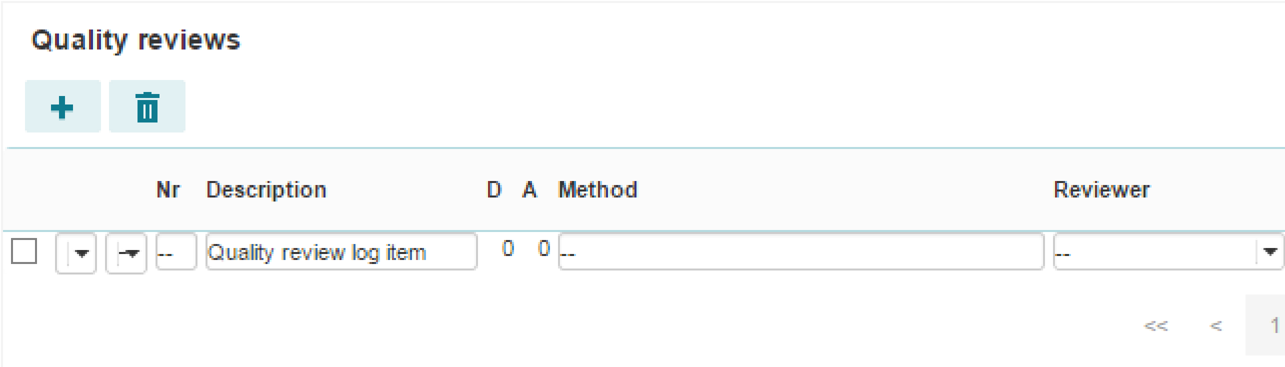
The criteria for the quality of a product are taken up in a product description. It describes the goal of the product, the composition of the product, which sources are to be used, the form in which the product should be delivered and which quality criteria the product must meet.

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 ‘**+**’ in the blue "Quality review listing" bar.



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.

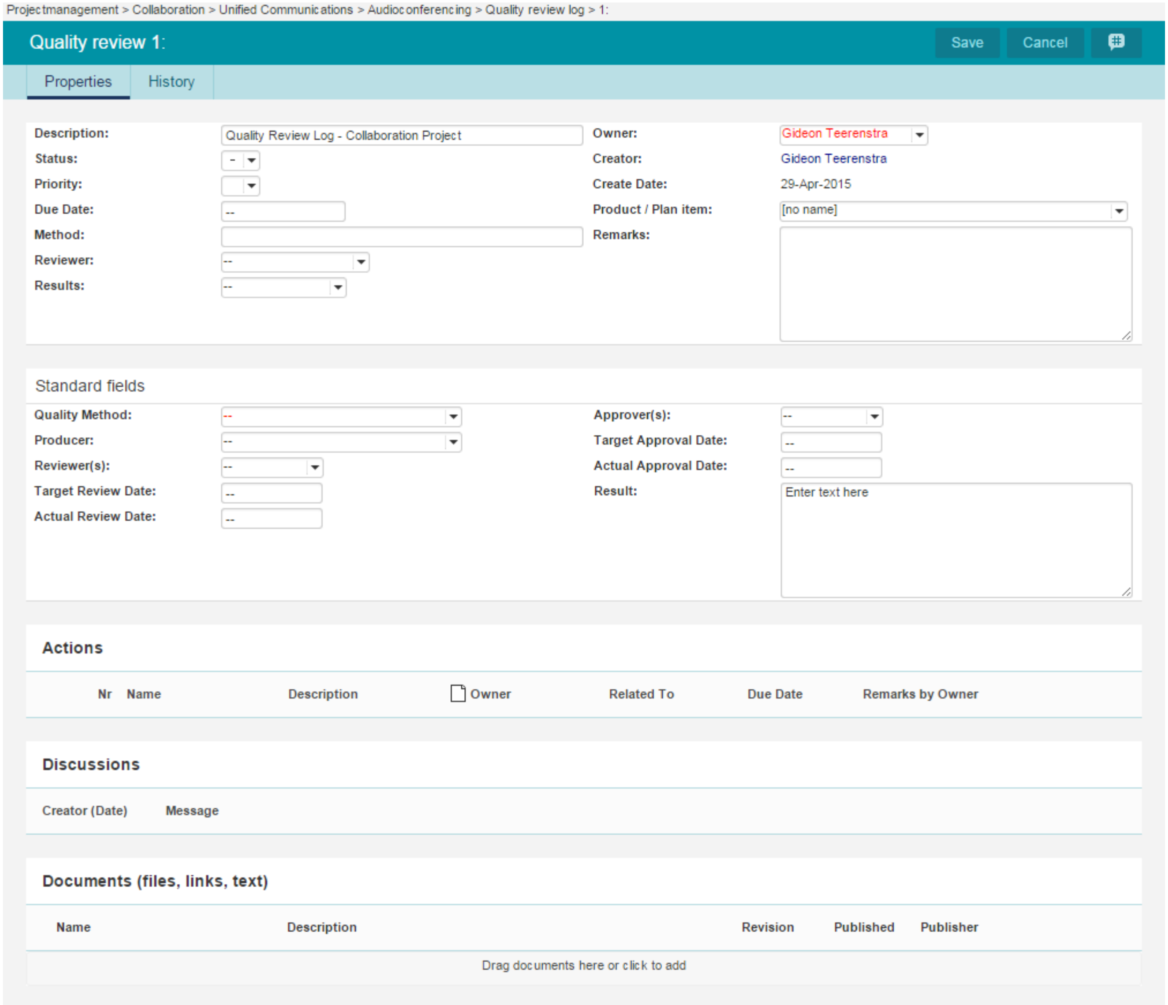
5. Click the **'Save'** button to save your new entry.

6. It is possible to add actions and documents to the quality review. To add an action you need to do the following; click ‘**+**’ 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 ‘**+**’ or ‘**+ note**’ behind documents you can add documents or notes with additional information to the quality review.



Adding a quality review

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

.

5.2.4.5.4 Change log

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

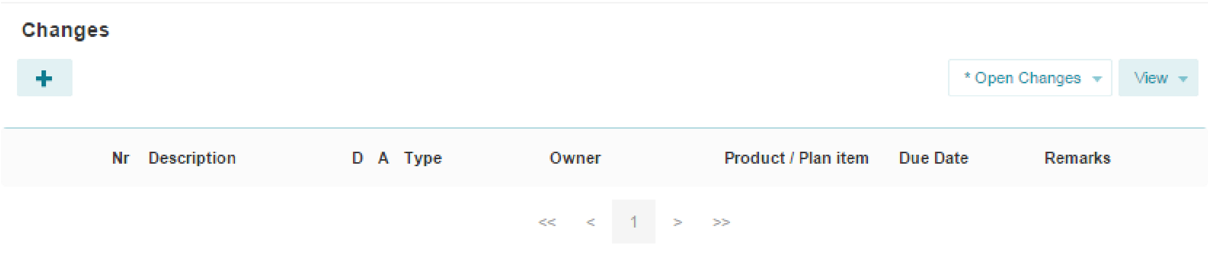
The project manager needs to judge all issues by their priority and their impact. In case that an issue (off-spec, RFC) falls within the tolerance of a stage then he/she can choose to accept the issue and log the change in the ‘Change log’.

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 **'+'** in the blue ‘Change listing’ bar.



4. Fill in the following information:

Description	:	Description of the change.
Type	:	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 '**+**' in the blue 'Action listing' header on the details page of the change. For more info about actions see Daily/action log 114.

7. By clicking '**+**' or '**+ note**' in the 'Documents' header you can add any related documents or notes.

8. To copy or move a change to another folder or project, you can use the **'Copy'** or **'Move'** button:


.

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.

5.2.4.5.5 Daily/action log

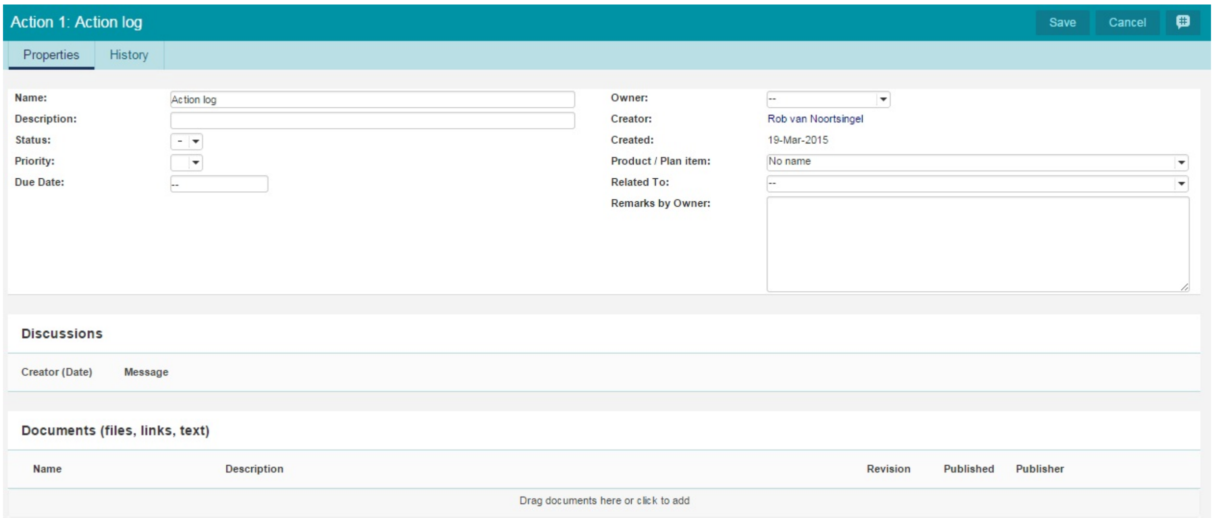
Actions can be created from product pages, related to issues, risks, changes, quality reviews and from the action log.

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



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*

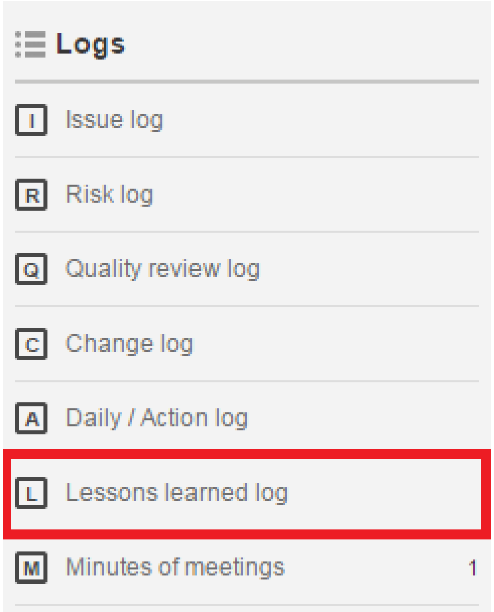
5.2.4.5.6 Lessons learned

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**'.



Lessons learned log

3. Create a new lessons learned entry by clicking **'+'**.

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 '**+**' or '**+ 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 folder or project, you can use the **'Copy'** or **'Move'** button: 

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> ***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.*

5.2.5 Finishing a project

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

The lessons learned report can be based on the lessons learned log that has been kept during the project. It is quite easy to generate an automated report 174 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.

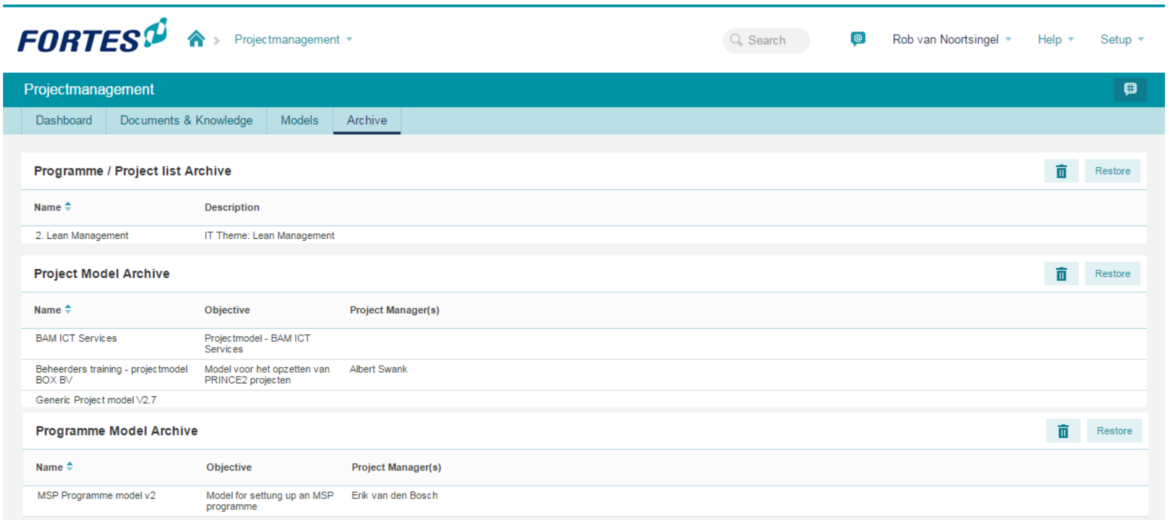
In this section we will further review:
- archiving projects; 117
- removing a project or project model. 118

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

5.2.5.1 Archiving a project (-model)

> ***Note**: Archiving a project can be done by the manager of a folder / 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.



Archive

1. Go to the **'folder dashboard'**.

2. Select the project concerned by clicking on it's row.

3. Click  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 folder / project list level. Note that each folder or

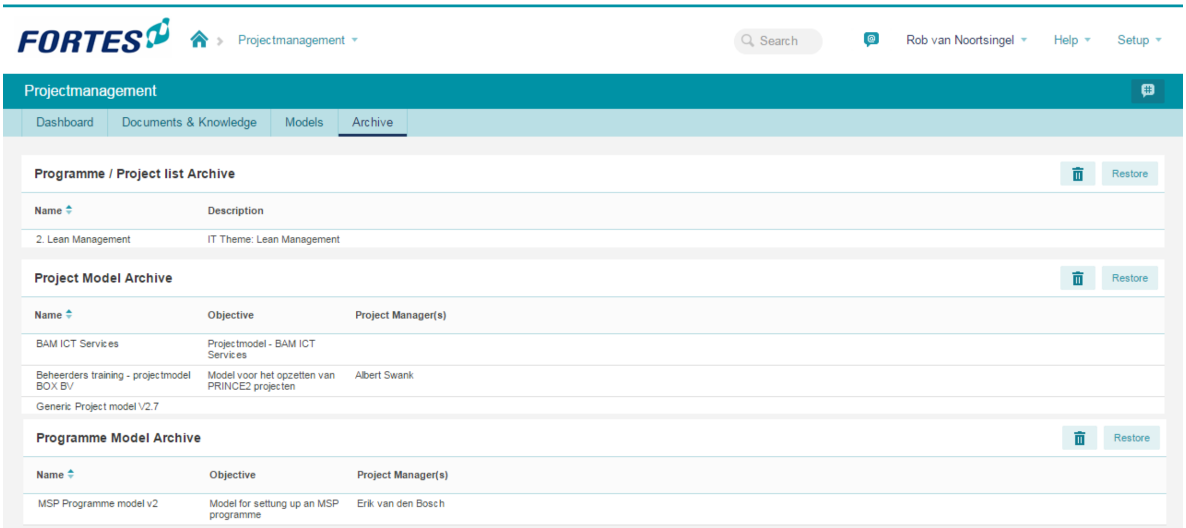
project list has its own archive.

6. Restoring a project or project model can be done from the **'Archive'** tab.

5.2.5.2 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) 117.

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



Archive tab

2. Select the project (model) concerned by clicking it's row.

3. Click ‘  ’ behind the project (model) and confirm with ‘**OK**’.

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

5.3 Classic PRINCE2 Project

As of release 6.0 a new project model has been made available which replaces the Classic PRINCE 2 Project model. 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.

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

1. Go to the Portfolio dashboard and click on **+** in the ‘Project listing’.
2. Enter the details and select the classic project model.
3. Select a project manager and click on **OK** to create the project.

The project is now available on the folder 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 Generic project planning 78.

5.3.1 Planning a Project

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.

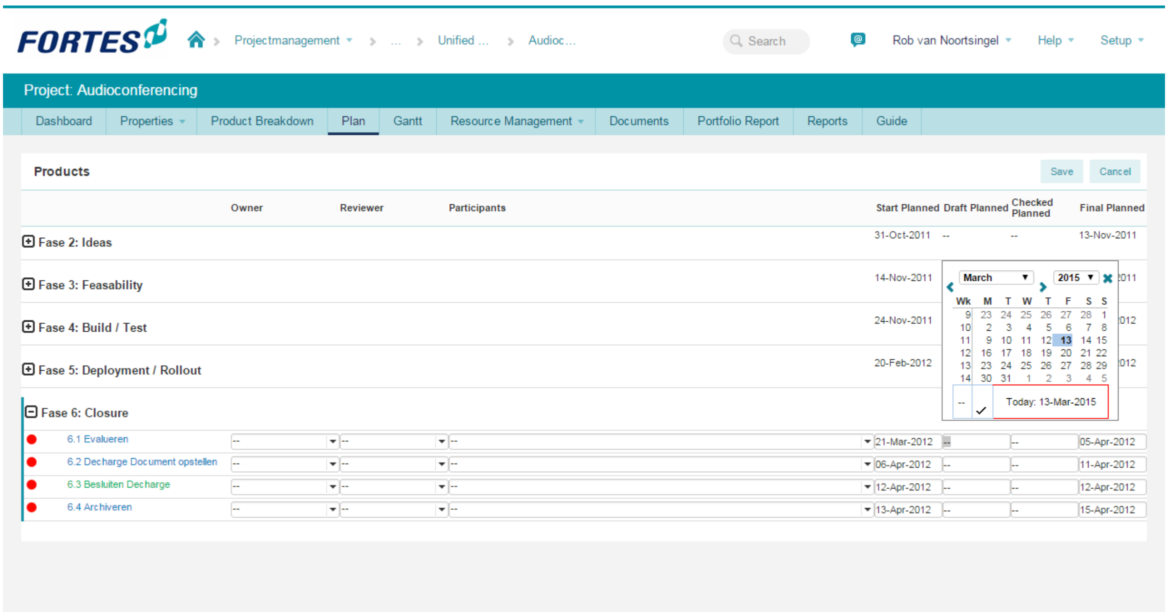
Planning the milestones within the project can be done in two ways:

On the dashboard and plan tab 119	:	Set milestones individually on the project dashboard or ‘Plan’ tab.
On the Gantt chart 120	:	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.

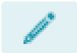
5.3.1.1 Using the dashboard or plan tab

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.



Filling in the milestones on the 'plan' tab.

1. Go to the project dashboard or the **'Plan'** tab.

2. Click 
3. Fill in the milestones for each products:
   - o Start: set the date work has to start on the product
   - o Draft: plan the delivery of a draft version
   - o Checked: set the end date for quality review
   - o 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.

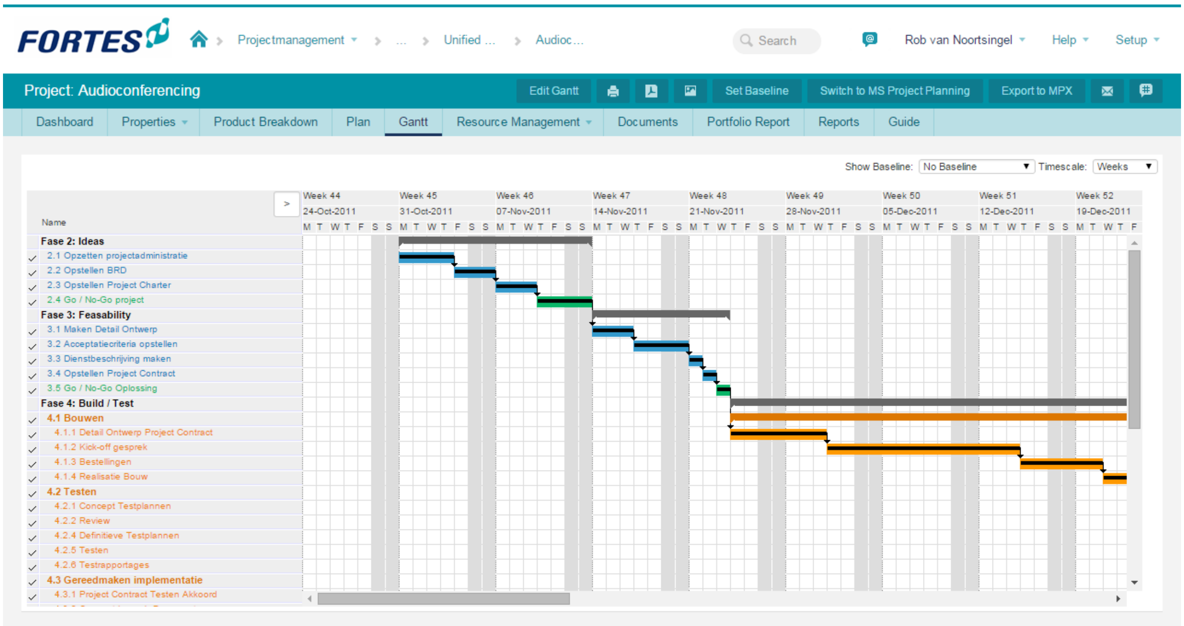
   Note: *If a milestone has finished (depicted by:'✔), you cannot change the date directly anymore. To change milestone data then, click the product name to open the product detail window. On the 'general' tab, you can delete or change the actual dates for each milestone.*

5.3.1.2 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.



Gantt

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

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

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

3. On the next page the planning can be entered in two ways. In the left hand half you can enter dates by clicking the cells and using the calendars. Alternatively, you can use the graphical part of the window. Here, you can change duration and dates with your mouse by dragging the time lines of products.

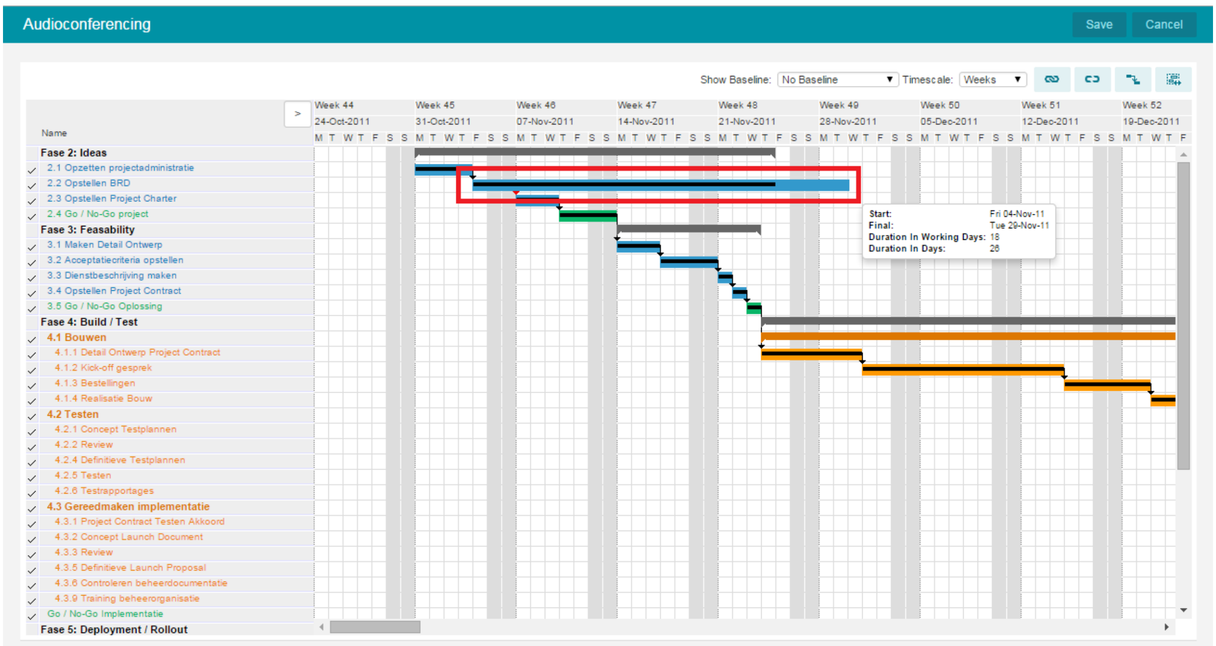
4. First of all you need to define the start date of your project. To do so click . In the dialogue, select the start date. This can also be used to move a group of products to a specific start date. See the note above for info about selecting multiple products.

5. Set the date of the first product in every stage or work package by dragging this to the planned start date or use the button shown above. All products in this specific work package or stage will be moved automatically to this date.

6. The next step is to plan the products in this specific stage or work package individually:
   a. To move the product forwards or backwards in time you need to place the cursor in the centre of the product bar, hold the left mouse button down and drag it to the correct position.
   b. To alter the duration, you need to place the cursor on one of the sides of the product time-bar and drag the side in the desired direction.

7. To define the draft and checked milestones or to set dates in a calendar, you can use the left side of the 'Edit Gantt' window. After clicking in a cell, a pop-up shows a calendar where you can choose the date.

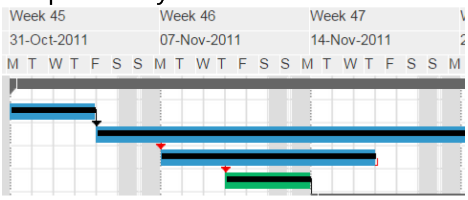
   As soon as you have set the draft or checked milestones in the table on the left, they are shown in the timeline on the right. Now you can drag them with your mouse as well.



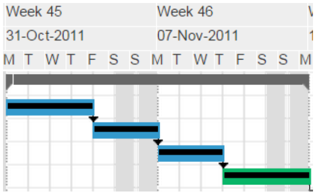
Editing the Gantt

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 defining dependencies[96]. To delete a dependency use **Remove dependency**. Buttons:

9. If dependency conflicts exist in your planning you can use the 'Solve conflicts button':  . Select 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.

11. As of version 7.5 it is possible to highlight the critical path. To do this click '**Edit**', next click '**View**' and select '**Show critical path**'.

> ***Note**: inconsistencies or conflicts resulting from mutually depending products are indicated by coloured indicators. For their meaning, consult the use of colours in projects 80. For more help on dependencies, see defining dependencies 96.*

5.3.2 Planning products

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 planning resources 163). 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.*

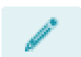
For the registration of both costs and hours, five types of registration are available:

• 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 = budget - EAC

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

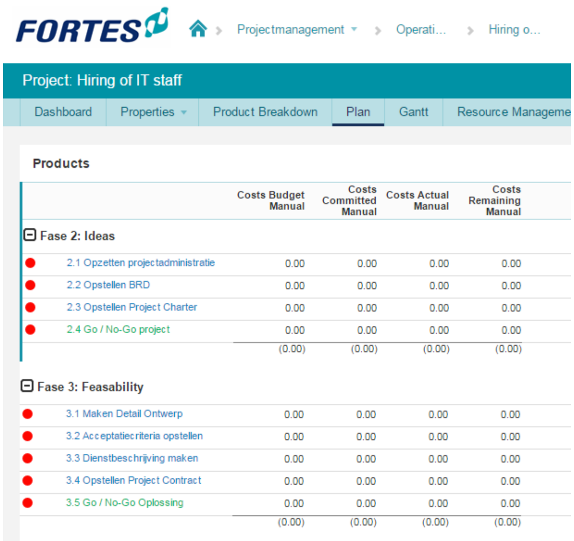
1. Go to the **'Plan'** tab.

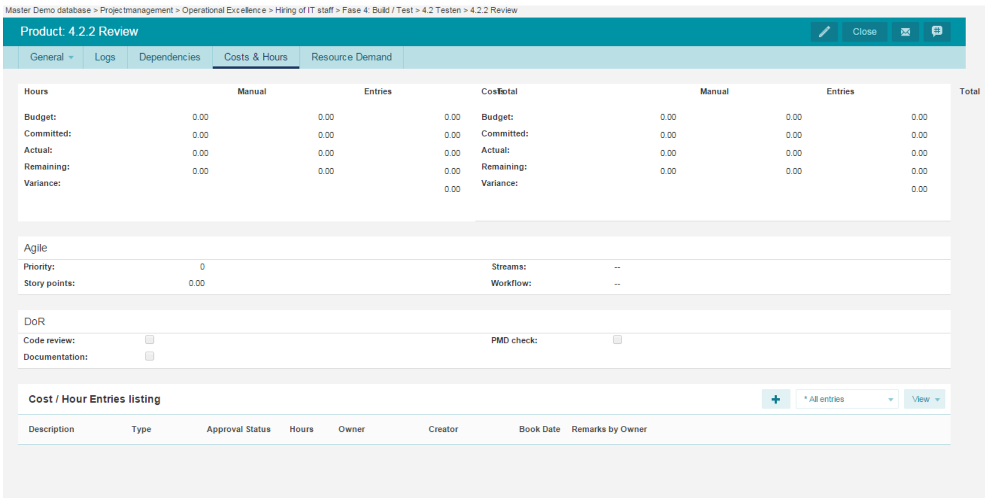
2. In the pull down menu select **Costs manual** or **hours manual**.

3. Click  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

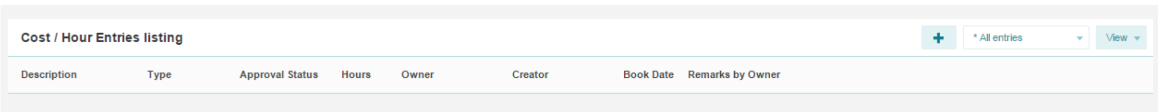
budgets there.





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.



5.3.3 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.

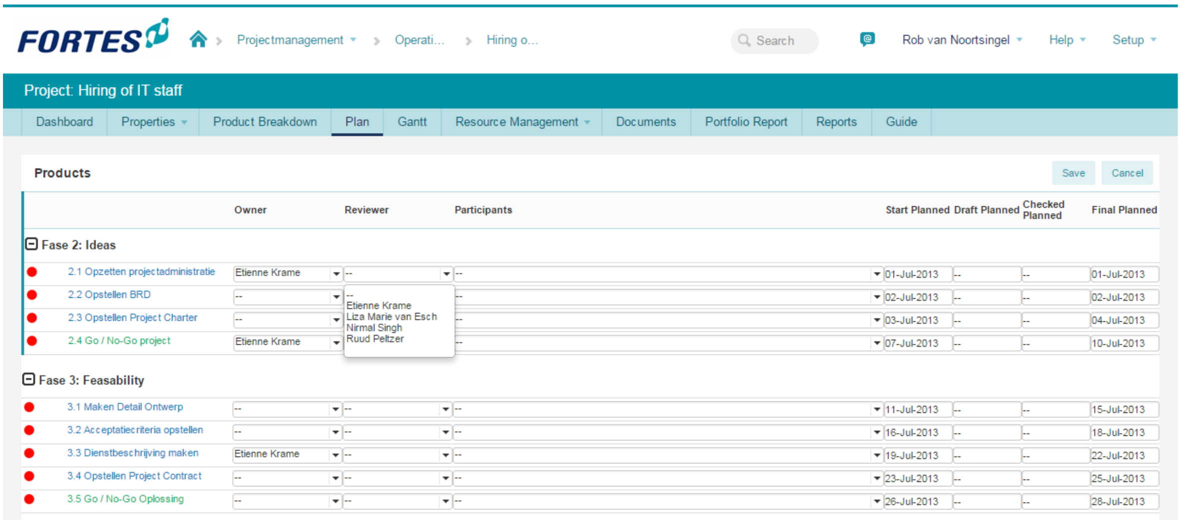
Note: You will first need to assemble your team. You can do this here 89*.*

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.



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.

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.

5.4 Agile Project Management (add-on)

As of release 7.0 a new project model has been made available. The new project model, called the Agile Project Management Model, offers new functionality to support Agile project management and SCRUM teams. To be able to use the new model, you will have to purchase and import the new project model first. You can purchase the Agile Project Management Model from our Sales Office.

Starting up a new project with the Agile Project Management Model:

1. Go to the Portfolio dashboard and click on **+** 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.

The project is now available on the folder 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 classic project planning 118 and the generic project planning 78 (introduced in release 6.0).

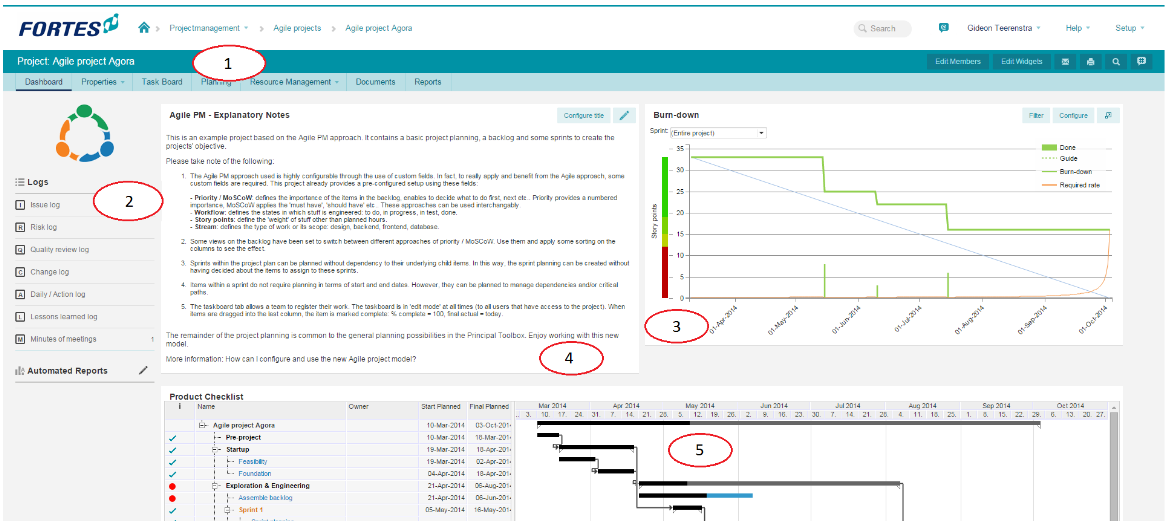
5.4.1 Agile Project

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 agile project:
- Agile project dashboard 125
- Planning an agile project 126

5.4.1.1 Agile Project Dashboard

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



Agile 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.
- Task board	:	An overview of all the tasks and user stories per sprint.
- Planning	:	Contains the backlog, Gantt chart and a summary of the Costs and Resources.
- Resource Management (add-on)	:	When the Resource Allocation add-on is available, the Resource Management Coordinator is able to request resources within the organisation units. It also gives the Resource Management Coordinator 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.
- Reports	:	Report functionality about the products, cost / hour entries and resource assignments of the project.

2. Logs
   It gives an overview of the logs 108 that are used in an Agile environment (most correspond with the logs 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.

3. Burn-down chart widget
   One of the available widgets for Agile projects. The burn-down chart widget can be used to track the completed user stories and the remaining story points of the sprint.

4. Agile PM - Explanatory Notes
   Here you see an explanation about working with the Agile PM. Note that this is a realisation of the Image & Text widget.

5. Product list
   Here you find the plan item planning concerned with the various stages and sprints.

5.4.1.2 Planning an agile project

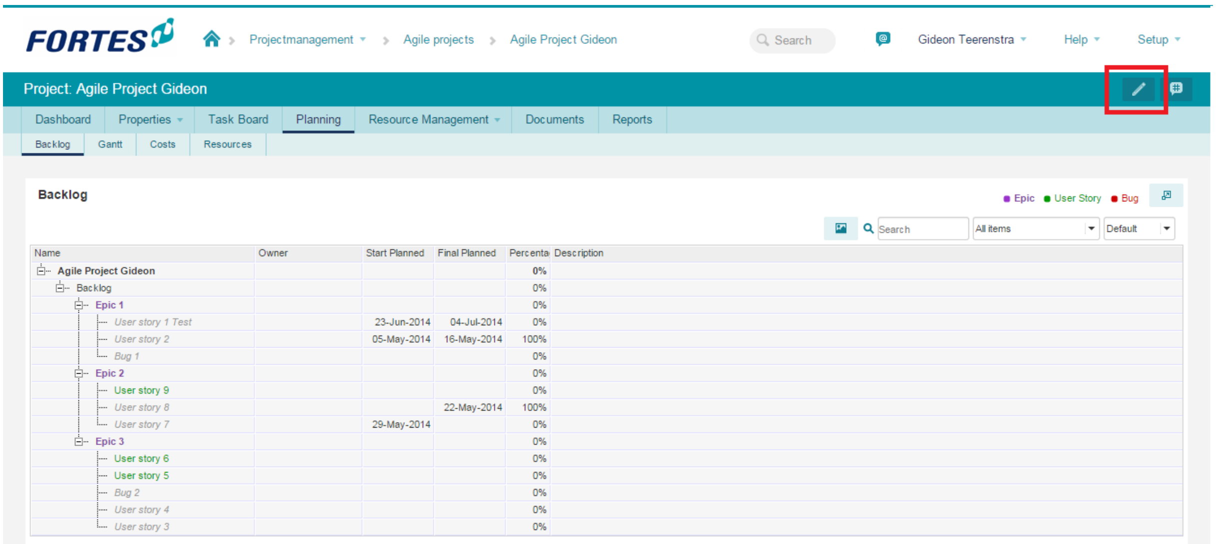
Project planning within the Principal Toolbox can be done by following these four steps:

1. Defining a product backlog & starting a sprint. 126
2. Assign tasks on the task board. 127

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.

5.4.1.2.1 Defining a product backlog & starting a sprint

To work with the Agile PM the product backlog has to be defined. To do this navigate to the '**Planning'** tab and click the 'edit' button.



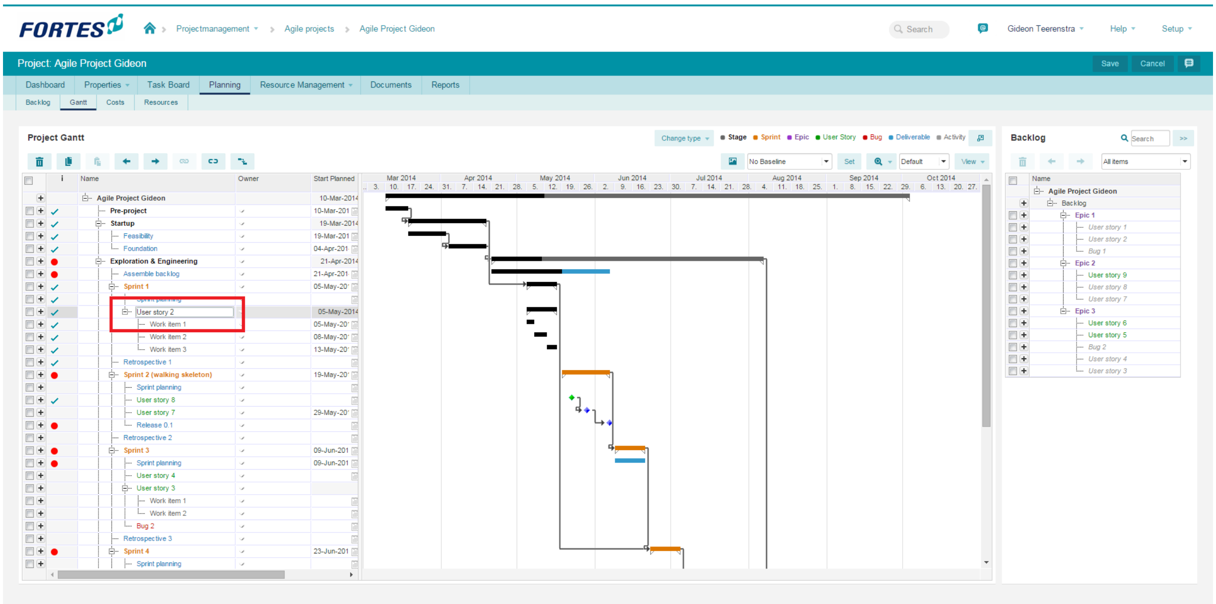
The product backlog of an Agile project.

The product owner can now enter all backlog items and assign owners to the user stories.
The available items in the backlog are:

- Epic
- User story
- Bug

During sprints completed items van be set to 'done' using the percentages column.

When the product backlog has been filled the first sprint can be started.
To do this navigate to the '**Planning**' tab, sub tab **'Gantt'**.
Click the '**Edit**' button and pick user stories from the backlog for the current sprint.



Agile Project Gantt and Sprint planning.

While working with the Agile PM there are some essentials to note.

- The throughput time of user stories can be set independently from the duration of the sprints. Sprints are not as long as the combination of user stories (which is the case with PRINCE2^{TM} projects).
- Details such as Story points, Priority and Streams can be assigned either by clicking on the User Story in the Gantt chart or by clicking on the user story names on the task board.

5.4.1.2.2 Assigning tasks on the task board

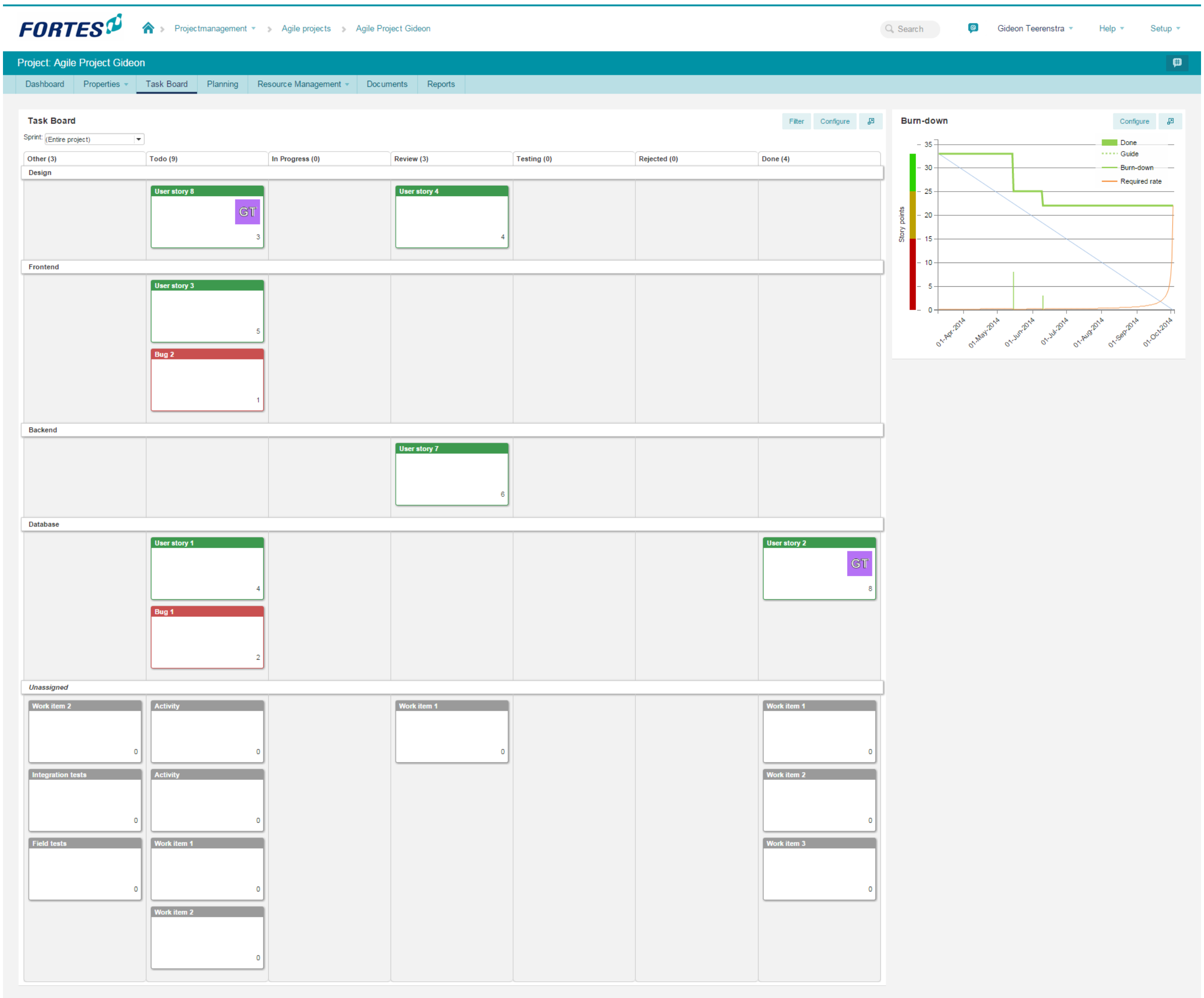
Assigning task on the task board is done in the Gannt chart.
Go to the '**Planning**' tab, sub tab '**Gantt**'.
For the current sprint, assign the user stories to employees.
The tasks on the task board are now assigned.

Notice that:
- When task are dragged around and dropped on the task board, the burn-down chart is affected directly.
- The story points at every stage is calculated in the header (Between brackets).

Next, navigate to the tab '**Task board**' and drag the task into the appropriate columns.
The columns are:

1. Other: All (currently) unplanned tasks can be dropped here.
2. To do: Tasks that should be completed during the coming sprint should be dropped here.
3. In Progress: When an employee starts working on a task, the task should be dropped here.
4. Review: After completing a user story the task should be dropped here to state that it should be reviewed.
5. Testing: When the task is ready for testing it should be dropped here.
6. Rejected: When a task gets rejected this is the place to drop it.

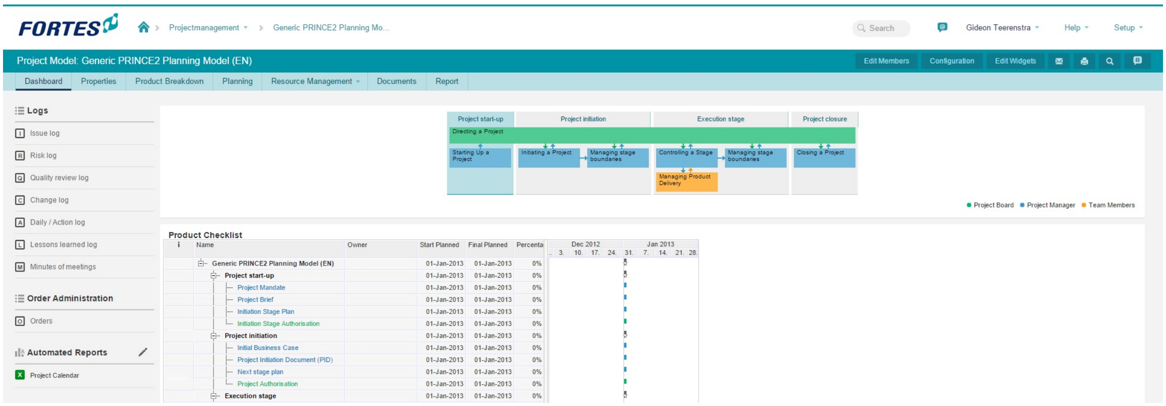
7. Done: When the task has reached the state of 'Done' it should be dropped here.



The Agile task board with all tasks.

5.5 Managing project models

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



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

It is possible to have multiple project models within your organisation. For instance, a default PRINCE2 project model for general use and more specialised project models with specialised content. For instance, a project model for sales or one for software implementation. For these purposes, you could build a product breakdown (see the section about product breakdown 84) that matches most situations for these specialised projects.

In the next sections, you will find information about

- Editing project models 129
- Creating project models 130

How to create automated reports is explained in the automated reports 174 section.

See also working with models 35 for more information.

5.5.1 Editing project models

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

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

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

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

1. Navigate to a folder / project list where you can create a temporary project. If there is no such folder 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 automated reports 174 to your project dashboard.
   h. Configure custom page layouts for the project properties and/or product / plan items.

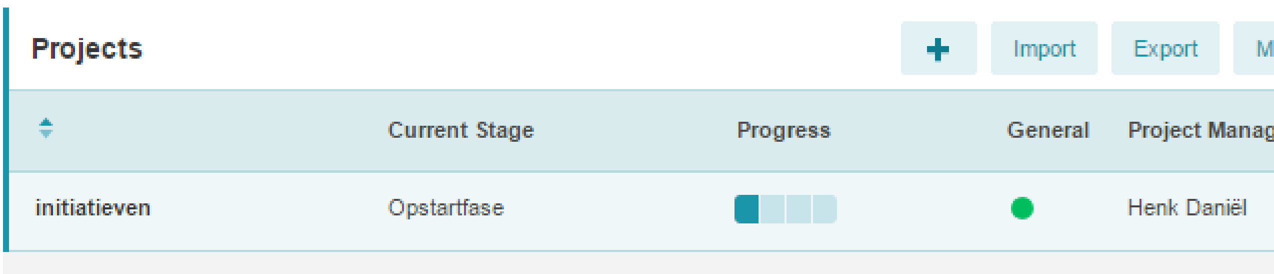
4. When finished editing the project, navigate back to the folder / project list dashboard. Create the project model as described in the next section 130.

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.

5.5.2 Creating project models

New project models are always based on existing projects. A system administrator or folder / 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 folder / project list dashboard, as illustrated below.



folder 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 folder or project list underneath the 'Project model listing' header at the bottom of the page.

5.5.3 Enterprise models

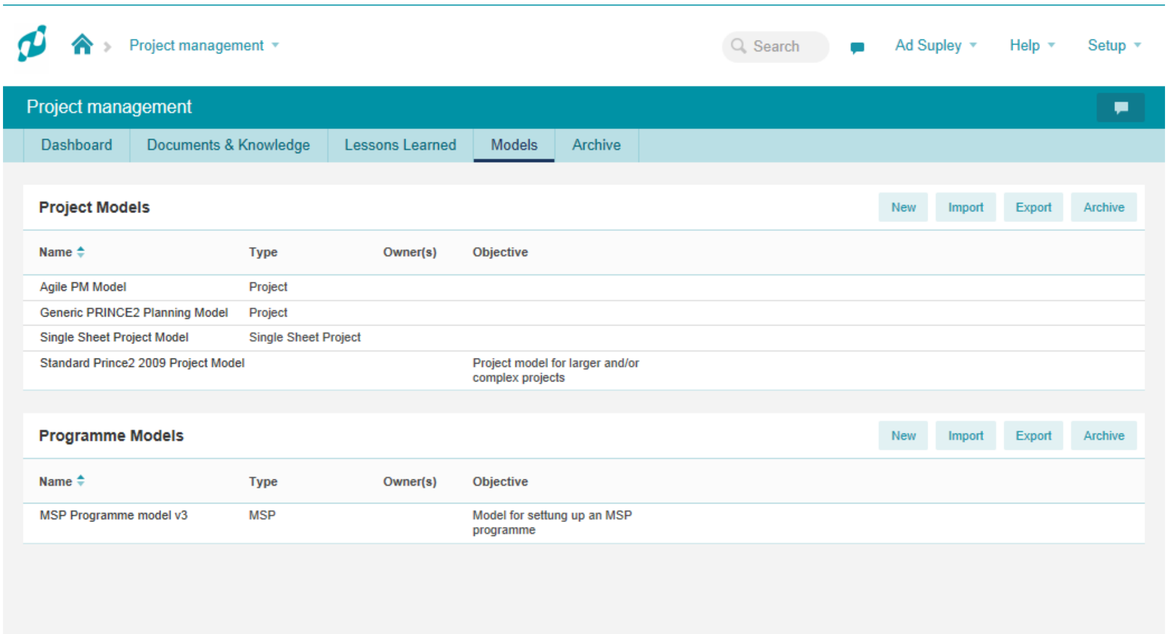
Project models can be created in any project list or folder. The model will be available on the level of the containing folder / project list and on all sub-levels. To make a project model available throughout the Principal Toolbox you can publish it at the so-called enterprise level (the highest level)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



Enterprise models

5.6 Order administration

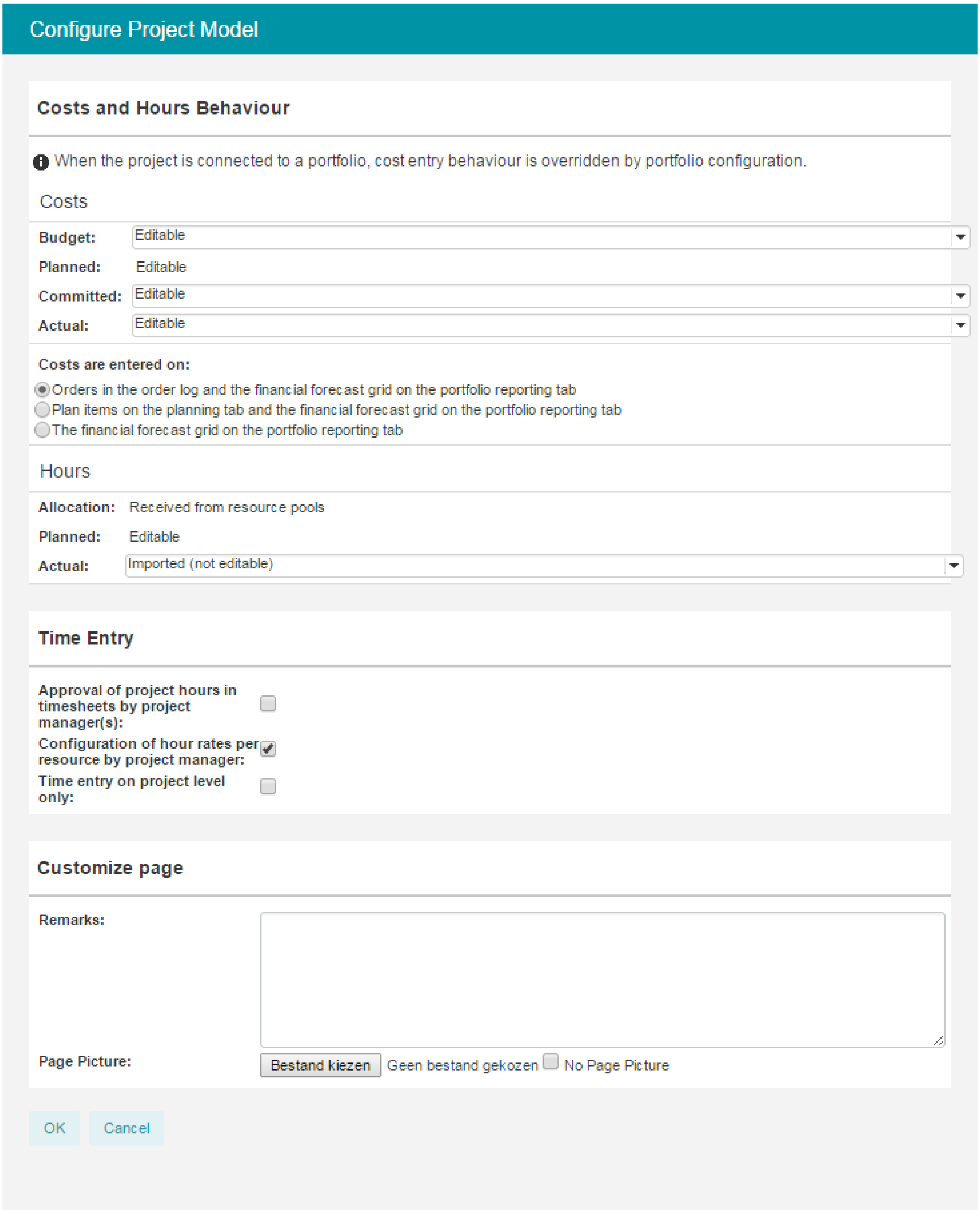
As of release 7.5 order administration has been made available. Order administration enables users capture orders and commitments within the Principal Toolbox. Orders can be linked to plan items. It is also possible to link multiple orders to a single plan item. Orders provide direct insight in current and planned expenditures based on planned hours.

To start using order administration the Project Model needs to be reconfigured first:

1. Navigate to the appropriate project model and click 

 to reconfigure the project model.

2. Set the costs that should be editable within order administration to editable, for '**Costs are entered on**' select '**Orders in the order log and the financial forecast grid on the portfolio reporting tab**'



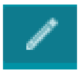
The order administration configuration of the project model.

After configuring the project model navigate to the project where order administration should be applied.

1. Click  to create a new order.

2. Enter a description and select an owner.

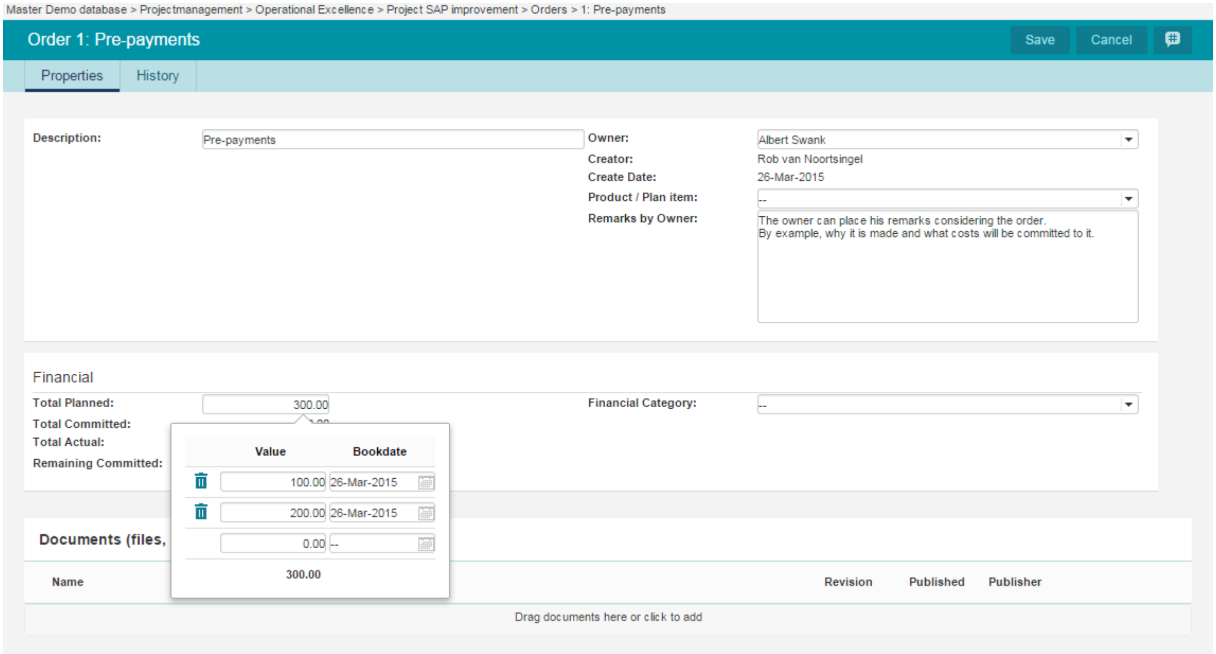
3. By clicking on the description further detail can be configured.

4. Click  to start editing the order.

5. On the '**Properties**' tab a Product / Plan item can be linked to the order.

6. A Financial Category has to be assigned for every order. This remains editable and can thus be changed when desired.

7. To edit the financials, click the appropriate field in the '**Financial**' section. A special editor opens. This editor states on what dates certain amounts of costs should be processed.
   In the example below on march 26th 2015 100.00 euros and 200.00 euros will be processed.
   Committed and Actual costs can be entered using the same process as well.



Entering costs on orders.

6 Time Entry (add-on)

As of release 8.0 of the Principal Toolbox, organisational units have been introduced. This introduction has had a significant impact on the processes of Time Entry and Resource Allocation, now combined into Resource Management. When your current version is prior to release 8.0 the functionalities of these modules can be found in the old version of the manual. As a result of this there is no longer the need to configure time entry groups since the organisational unit for which you activate the Time Entry Module acts as such.

Registration of hours using the Principal Toolbox is done by using the module 'Time Entry'. Users of the Principal Toolbox who are assigned to organisational units with Resource Management enabled 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.

Before starting it is important to navigate to the appropriate organisational unit and activate Time Entry for this organisational unit.

Note: In versions prior to 8.0 it was necessary to define time entry groups for time entry, these are replaced by organisational units. The organisational unit for which time entry is activated is your time entry group. For more information see the Organisational Units 14 *section of the manual.*

6.1 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 134
   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 organisational units.

2. Creating non-project activity sets 217
   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 organisational units, different sets can be created.

See also Registration of actual hours 100 for more information about using Time sheets.

6.1.1 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:

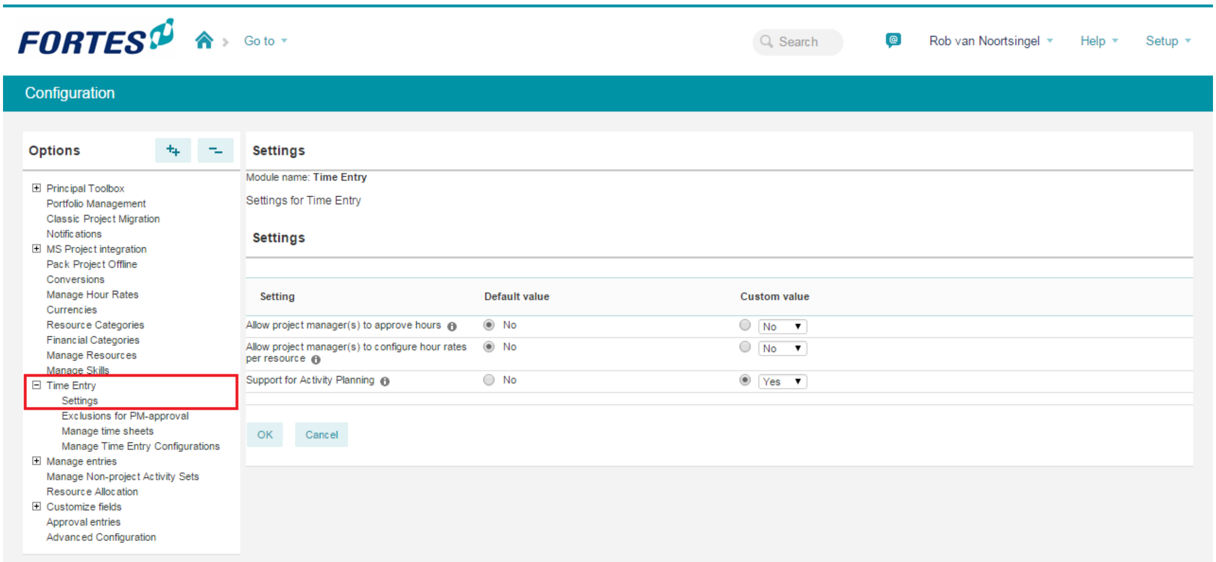
- which filters should be used for pre-selected items

- which filters should be used for selectable items

Creating a time entry configuration (Support for Activity Planning = No)
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 > Time Entry > Settings.**

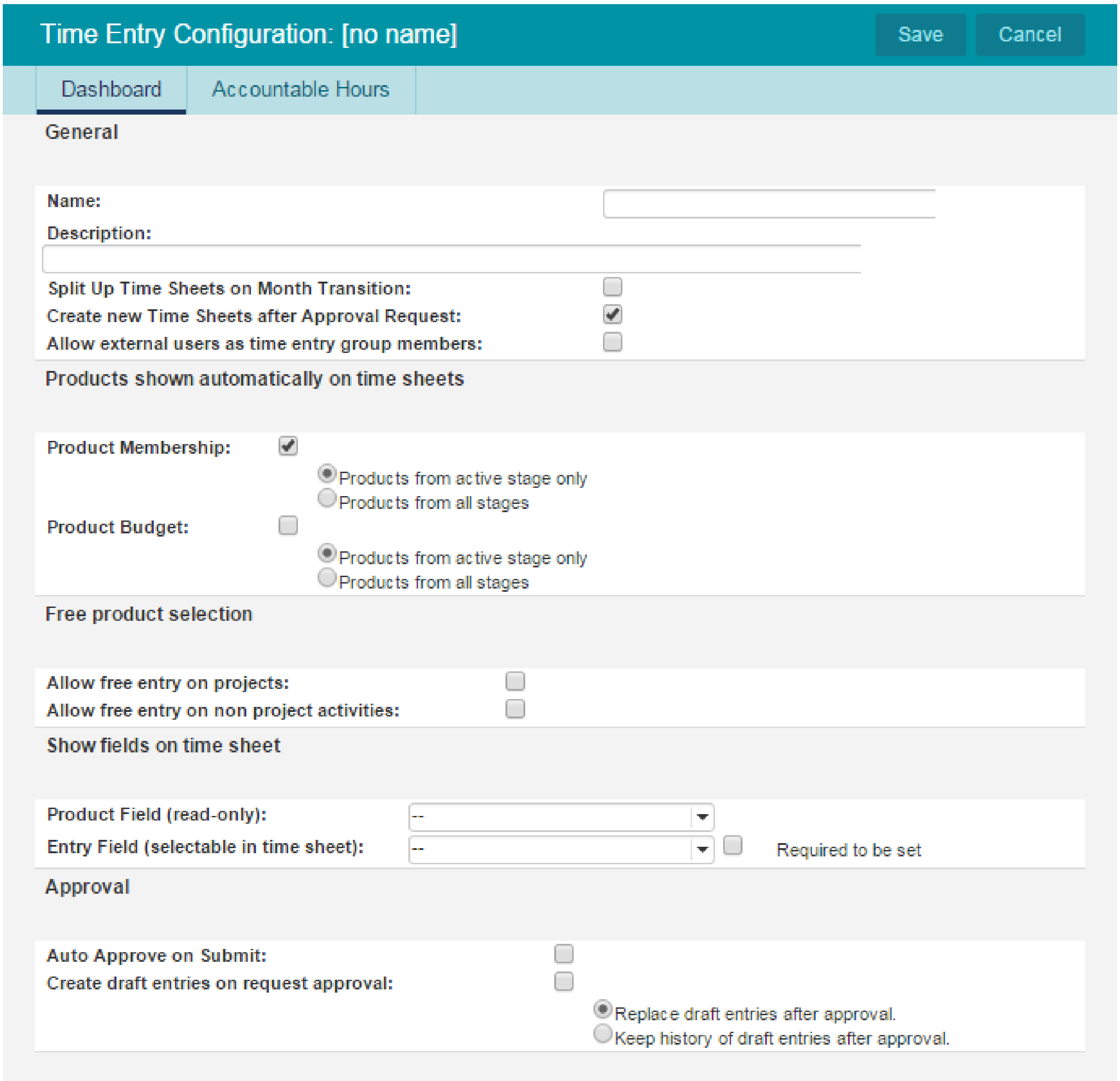
2. Click on **Edit** to disable the **'Support for Activity Planning'.**



Enable Support for Activity Planning

3. Go to **Manage Time Entry Configurations** module.

4. Click on  to create a new time entry configuration.



Time Entry Configuration with planning item filters

5. 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.

6. Show fields on Time Sheet

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.

7. Approval

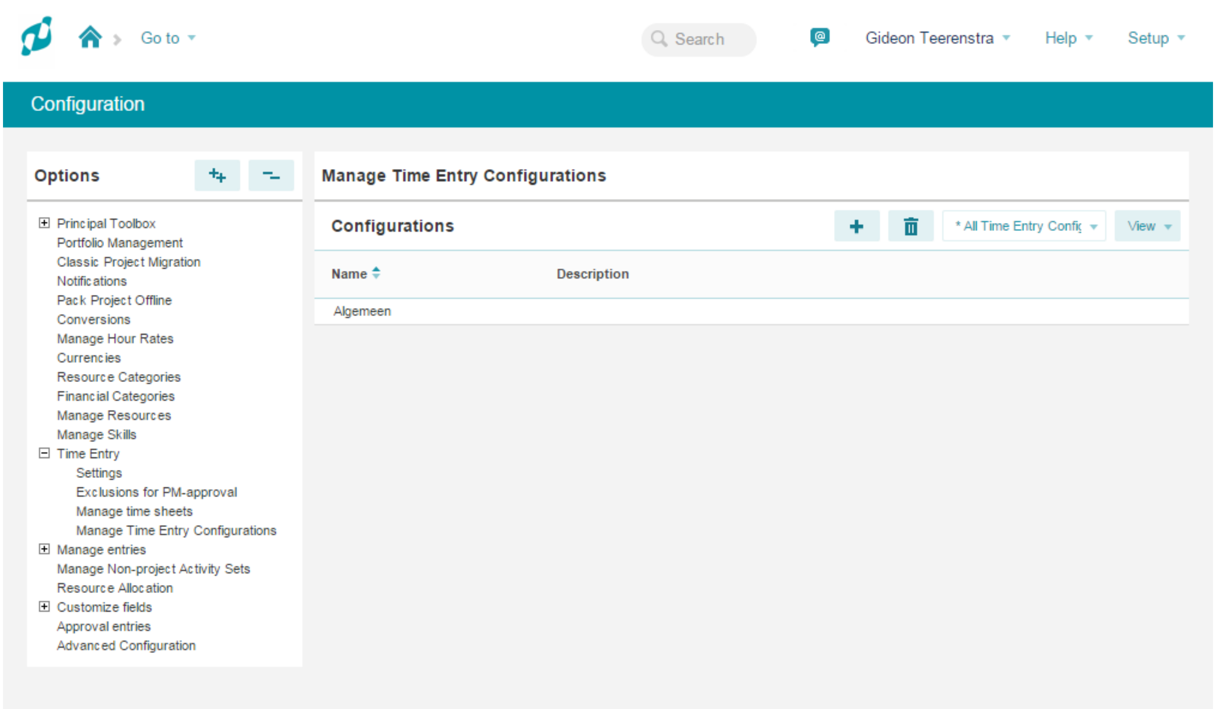
Approval	:	Select the option 'Auto Approve on Submit' if the Department Manager doesn't need to approve the hours. For more information about the approval process please take a look at: Configuring the approval process 140. Create draft entries on request approval: use this option if a draft entry needs to be created when requesting approval.

8. Click **Save** to store the time registration configuration.

9. Now you can close this dialog, by clicking **Close**.

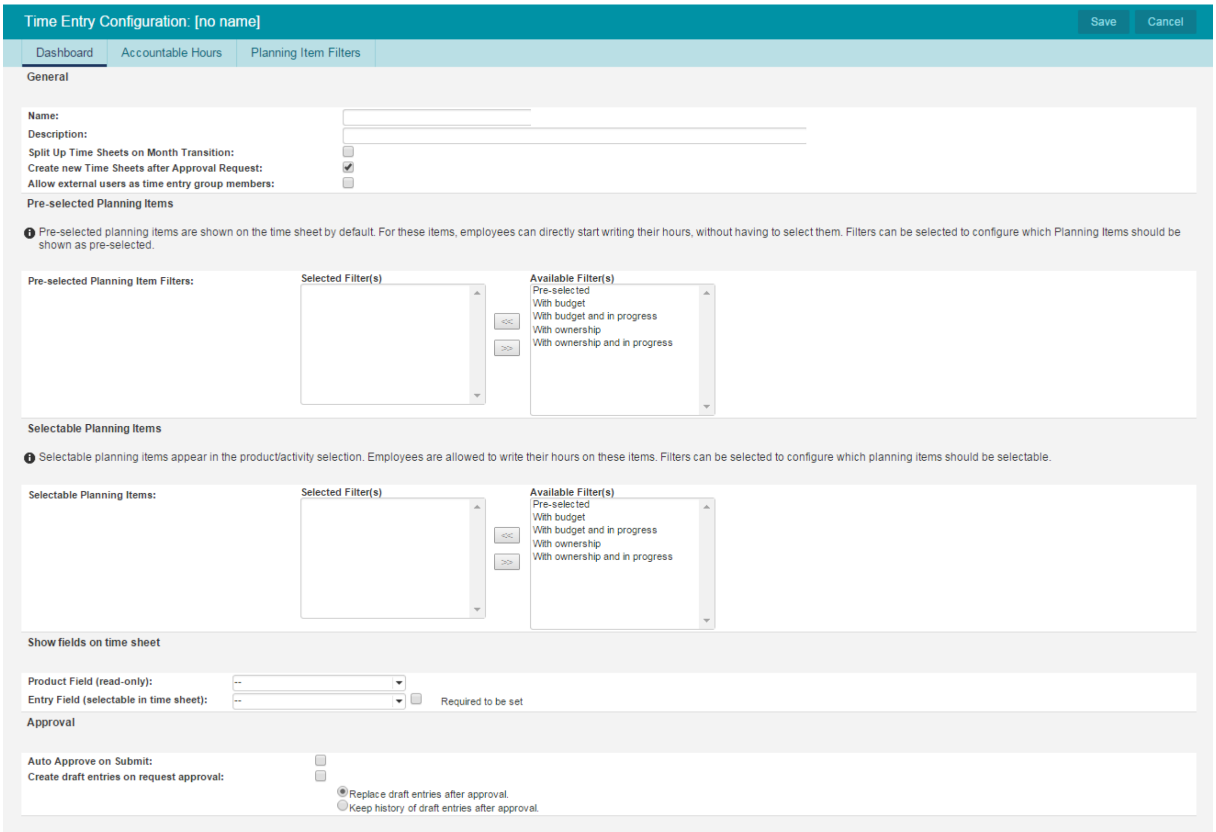
Time entry configuration with product / plan item filters (Support for Activity Planning = Yes)
There are multiple ways to create time entry configuration. The default way to define a time entry configuration is described below.

1. Navigate to the **Settings > Configuration > Manage Time Entry Configurations**.



Overview of the available Time Entry Configurations.

2. Click  to add a Time Entry Configuration.



Creating a Time Entry Configuration.

3. Enter the following information:

Name	:	Name of the time entry configuration.
Description	:	Description of the time entry configuration.
Split Up Time Sheets on Month Transition	:	Select whether the time sheets are to be split on month transition.
Create new Time Sheets after Approval Request	:	Select whether new Time Sheets are to be generated after the Approval Request.
Allow external users as time entry group members	:	Select whether external user as time entry group members so that Time Sheets are generated for them as well.

4. Set the pre-selected Planning Item Filters.

Pre-selected Planning Item Filters	:	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.

5. Set the selectable Planning Items.

Selectable Planning Items	:	Select which products can be selected on the time sheet by the users. The same options are available as described above.

6. Select which fields should be shown on the Time Sheets.

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.

7. Select the approval options. For more information of Time Sheet approval click here 148.

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: Configuring the approval process 140. Create draft entries on request approval: use this option if a draft entry needs to be created when requesting approval.

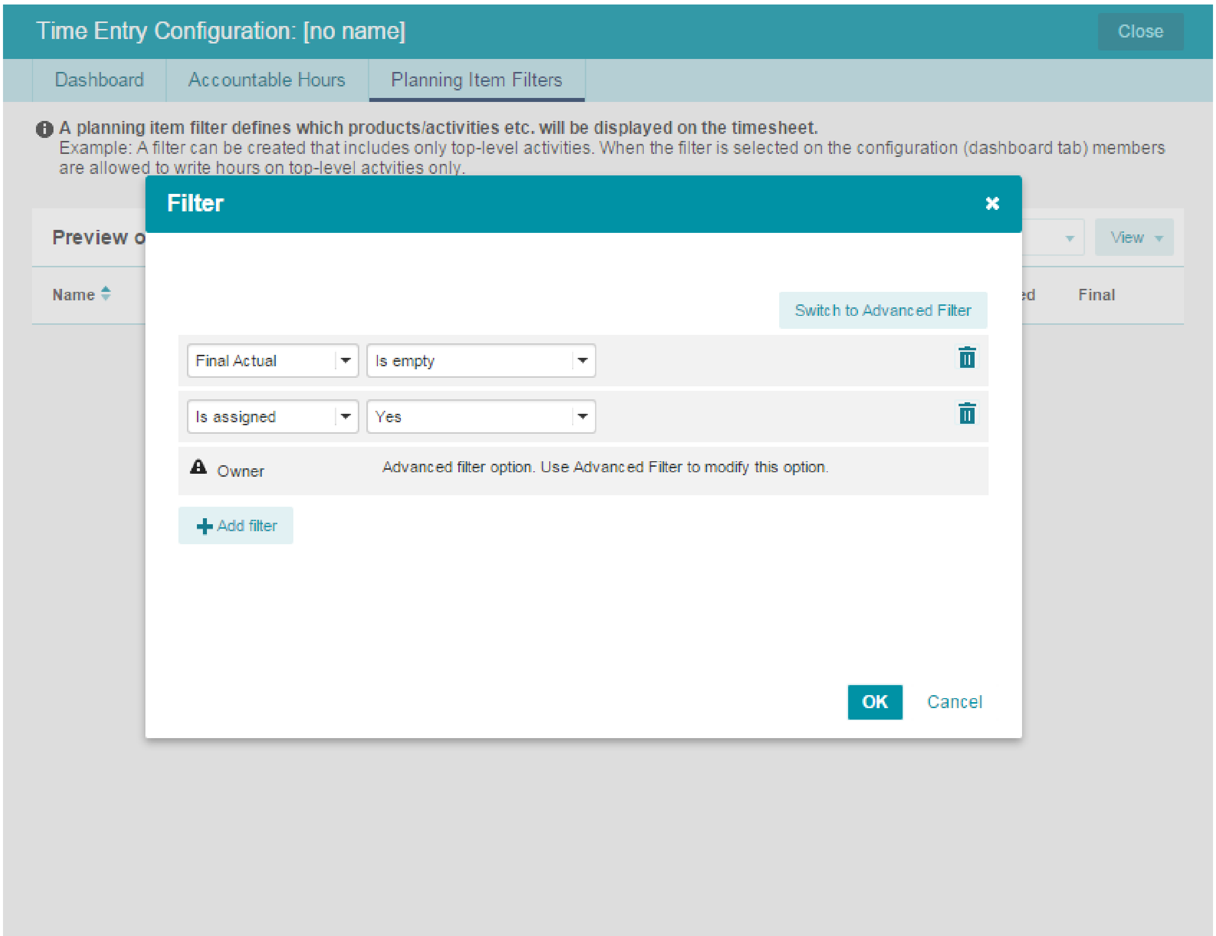
8. Click **Save** to store the time registration configuration.

9. 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 or 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** and select **Set Filter**.



Creating a Planning Item Filter

3. A list with available filters will appear. Configure the filter and click on **OK**.

4. To save the view click on **View Options** and **Save View**.

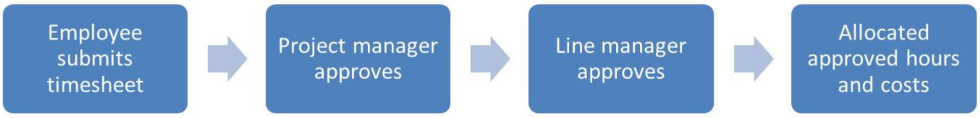
5. Enter the name of the view, select the type and click on **OK**.

6. The 'Planning Item Filter' is now available in the time entry configuration.

6.1.1.1 Configuring the approval process

Approving Time sheets can be set up in four different ways:

- Approval required by the project manager and line manager:



- Approval required by the line manager only

- Approval required by the project manager only

- No approval required: Time sheets are automatically approved when submitted

The approval process can be configured in these various ways using a number of settings. The steps to configure each approval process follow below.

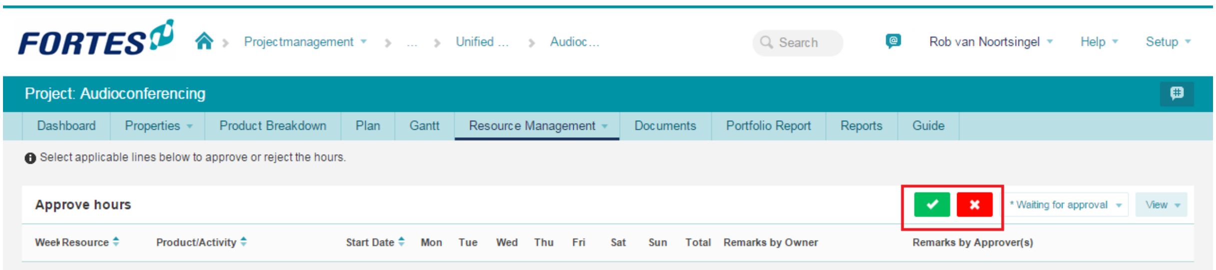
Approval by project manager only

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'.



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 Entry Configuration** from within **Configuration > Manage Time Entry Configurations**.

2. Make sure that **Auto Approve on Submit** is <u>unchecked</u>.

3. Open the **Resource Management Configuration** at the appropriate organisational unit.

4. Select the configuration that you have just edited and select the appropriate approvers in the Resource Management Configuration.

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. Open a **Time Entry Configuration** from within **Configuration > Manage Time Entry Configurations**.

2. Make sure that **Auto Approve on Submit** is <u>checked</u>.

3. Open the **Resource Management Configuration** at the appropriate organisational unit.

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 Organisational Unit -> Resource Management)

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)

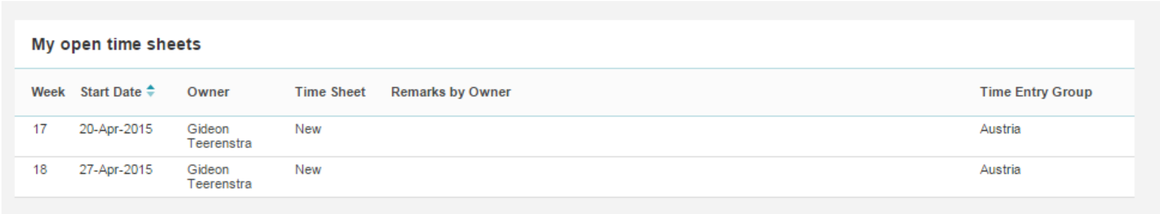
Automatic approval

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)

6.1.2 Entering & 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'**.



My open Time sheets on the homepage

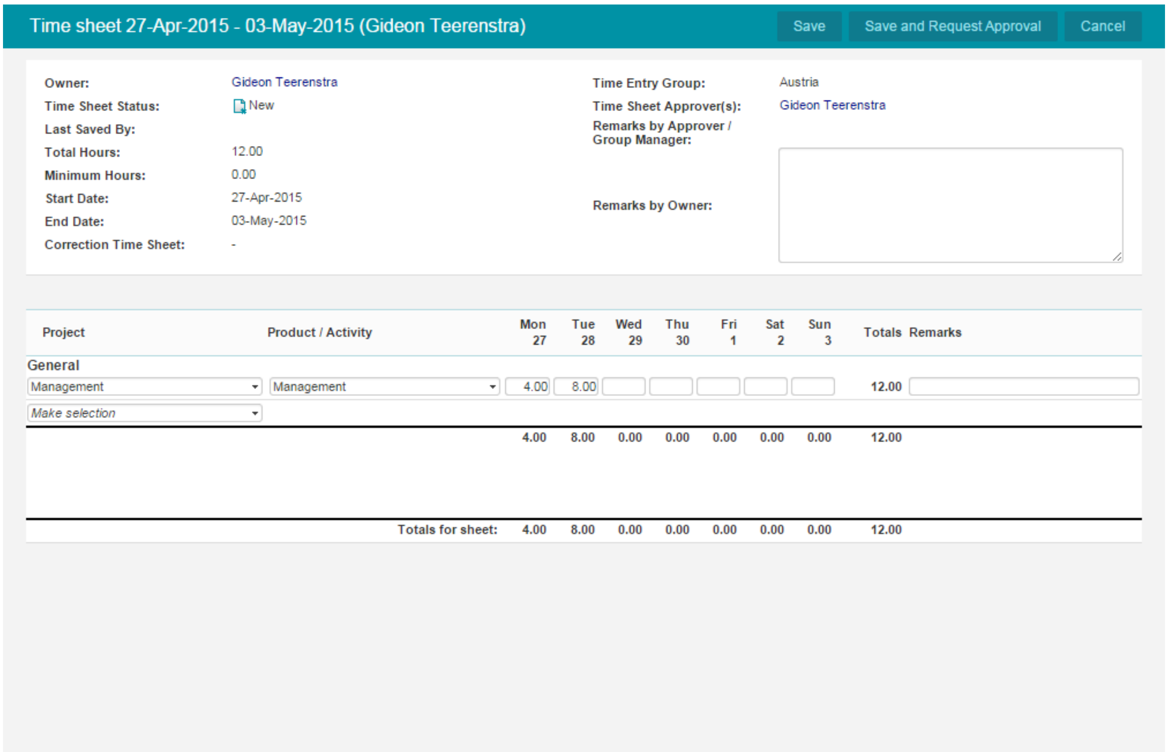
Entering time sheets

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 next section 148.



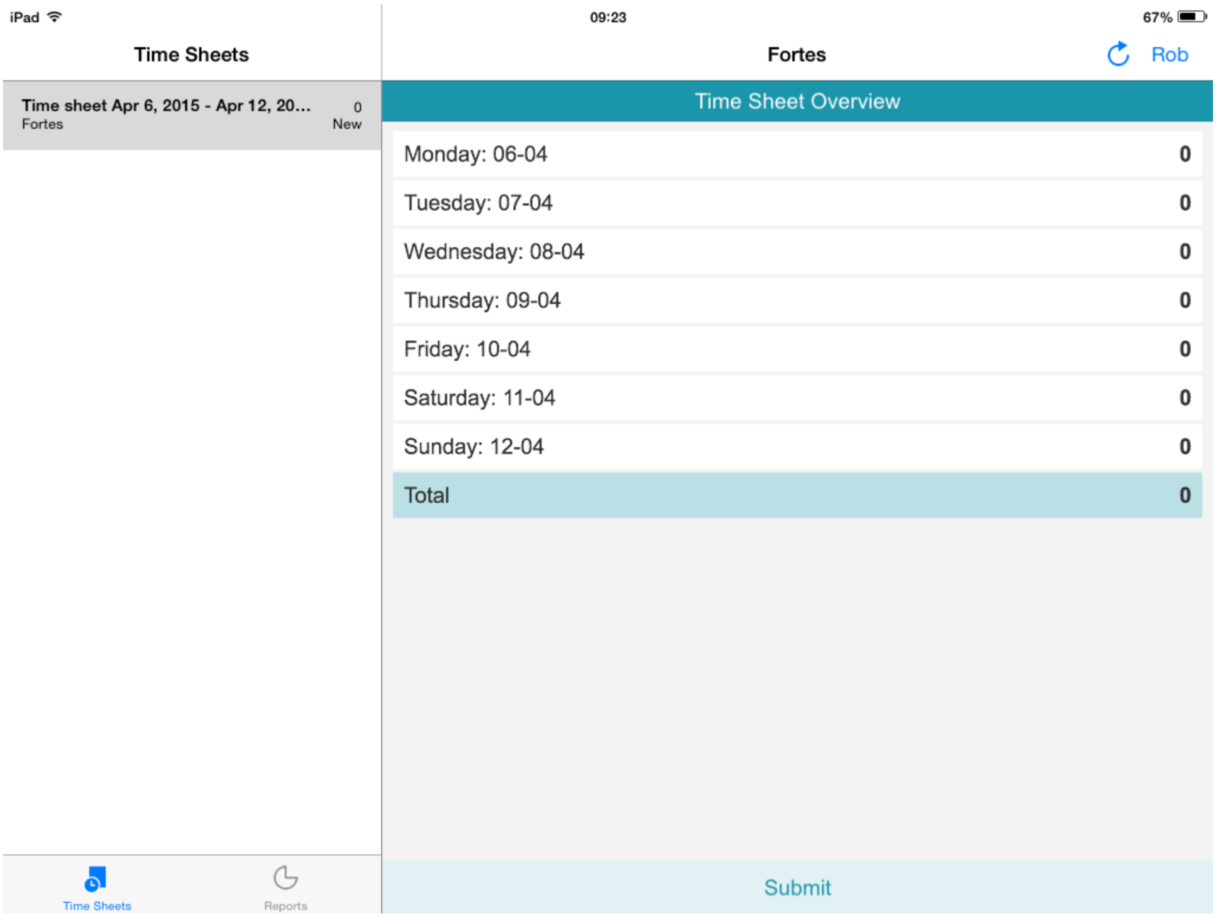
Time sheets

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.

Mobile Time Entry

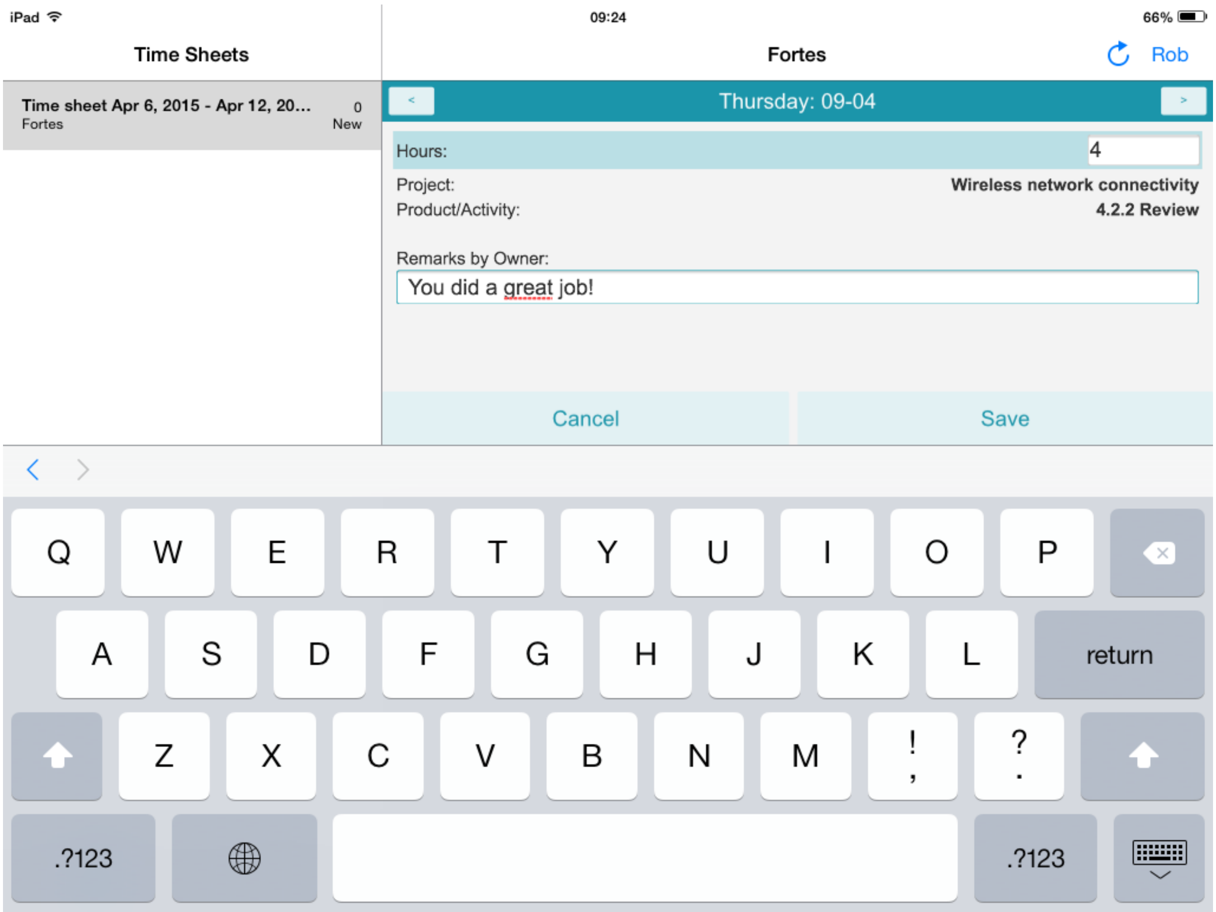
Note: The manual contains screenshot taken from the application on a tablet. When accessing the application on a phone the screens will split.

When you log in to the app and navigate to the time sheet section you can see all your open time sheets.



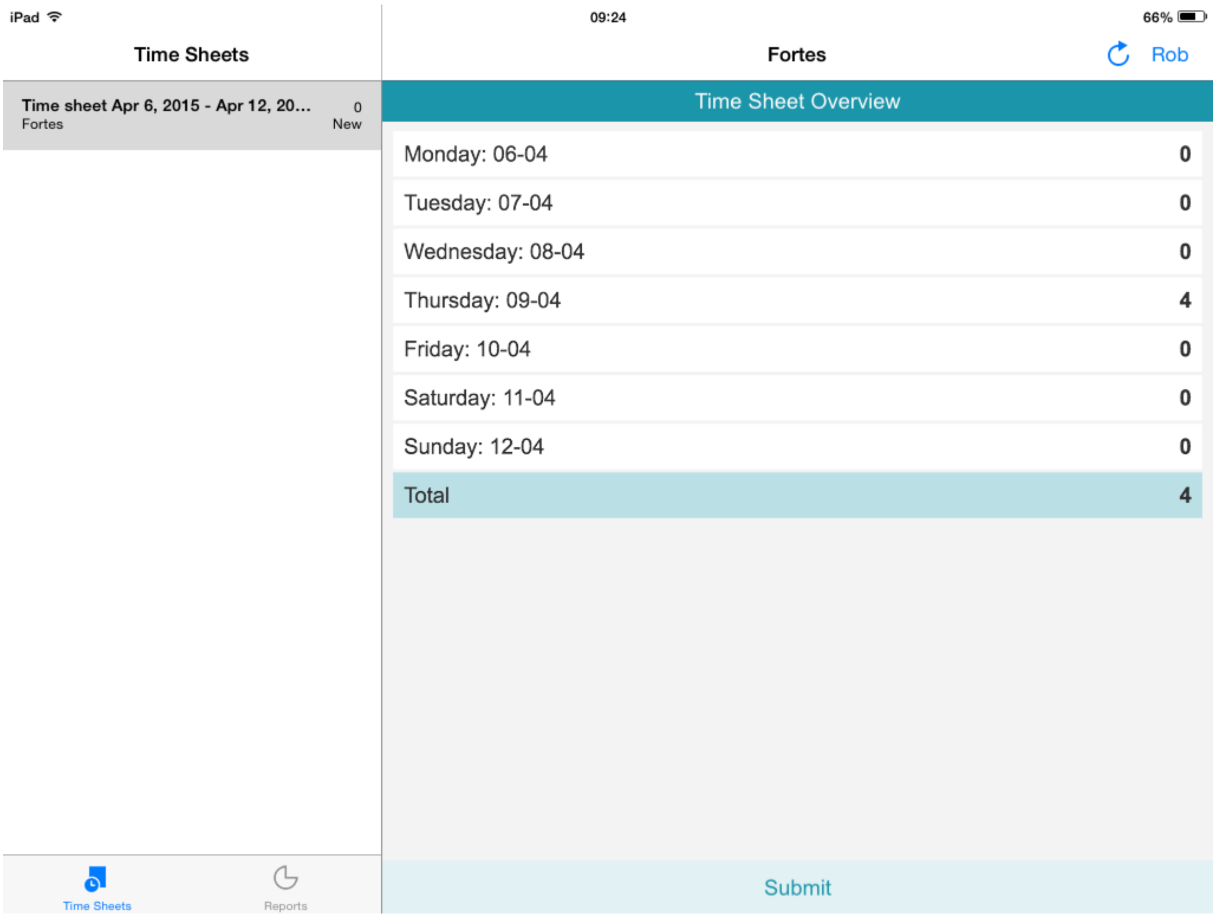
The open time sheet for the current user.

You can update the time sheet by selecting the day and activity.
You are then able to register your hours and add a comment.



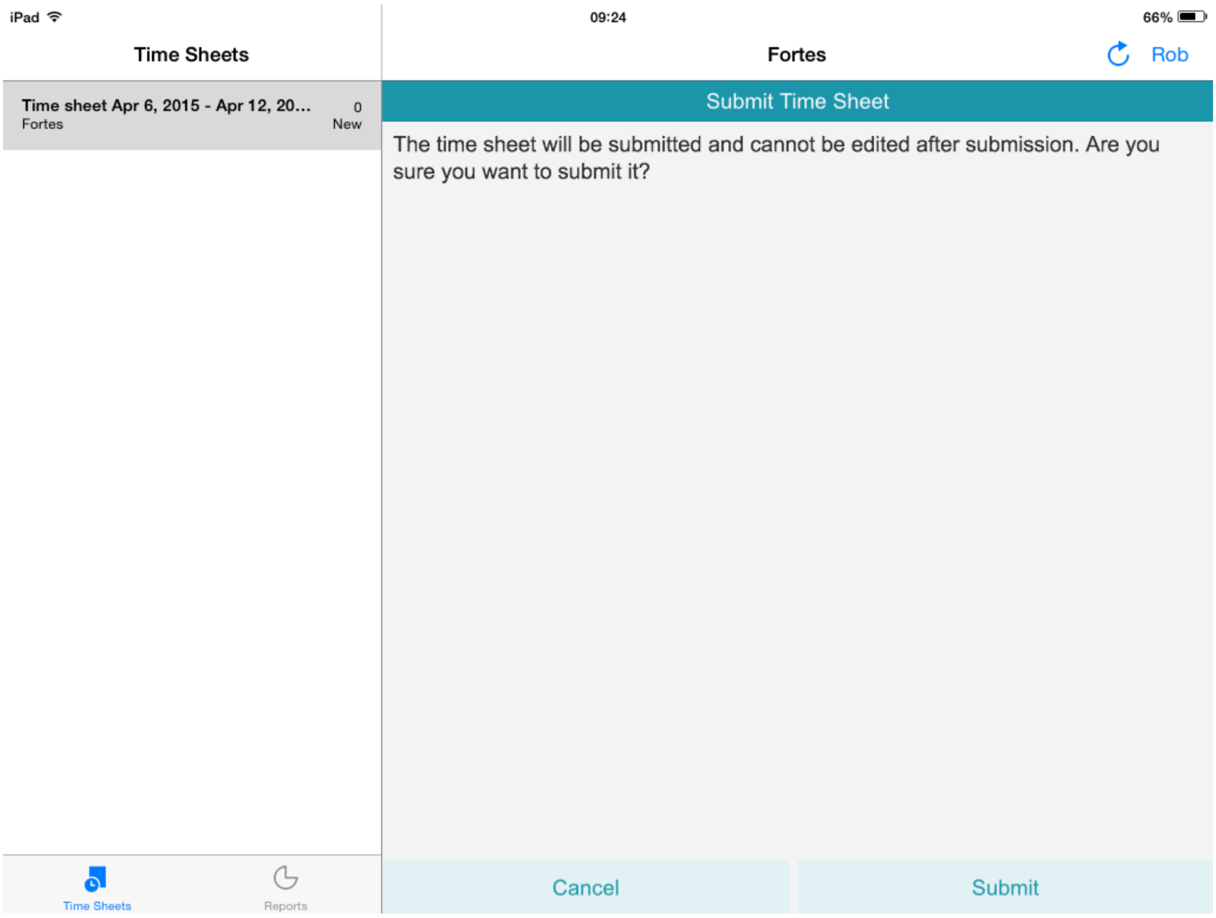
Time registration by Rob.

These hours are automatically updated in the Principal Toolbox and the application.



Update hours in the time sheet.

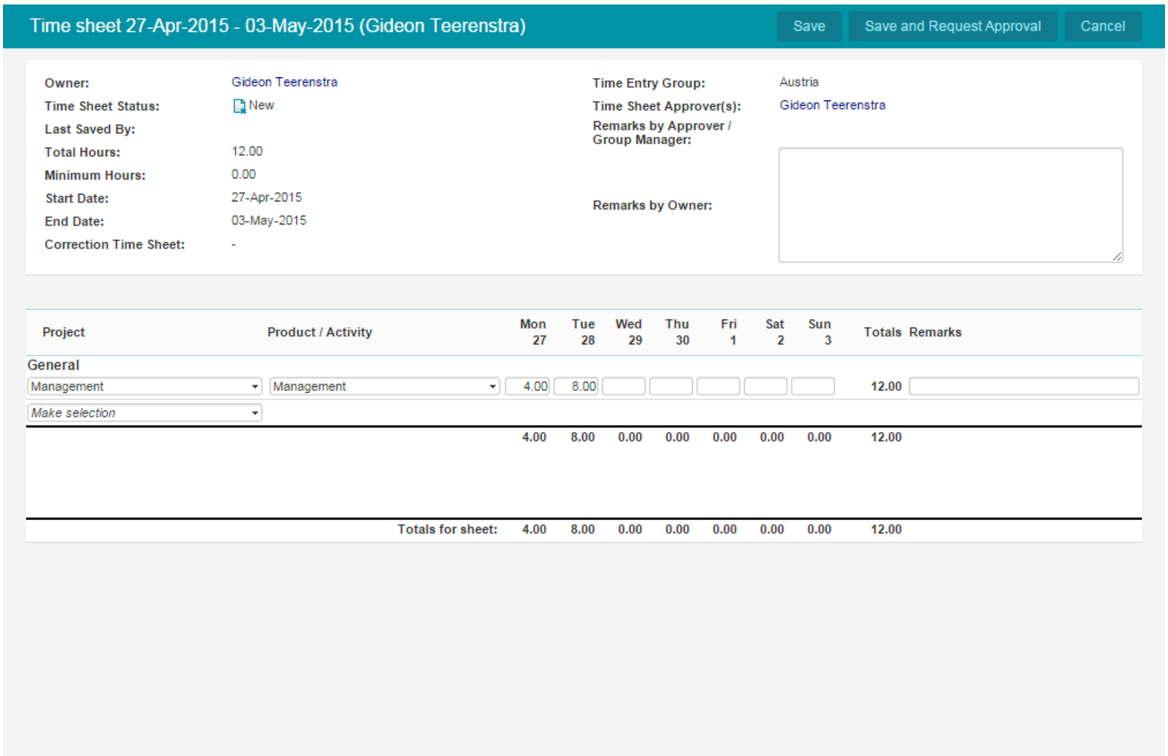
By clicking '**Submit**' the time sheet will be submitted for review and can no longer be edited.



Submitting the time sheet.

Submitting time sheets

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



A time sheet

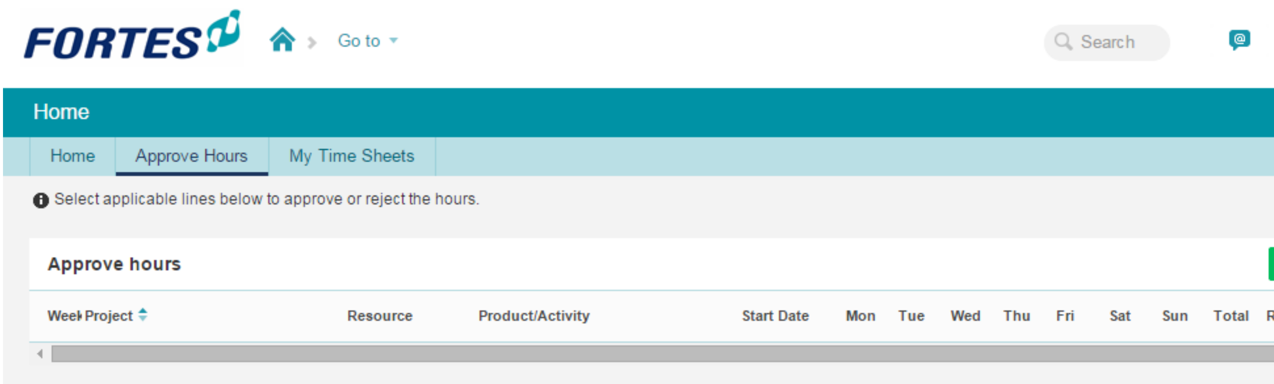
When finished entering hours, press **'Save'** or **'Save and Request Approval'**. The latter option will only be available when an approval process has been set up.

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 'Approving Time sheets' 148 for instructions on how to approve the submitted Time sheets.

6.1.3 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.



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.

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.

6.2 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 149

2. Let project managers set hourly rates 150

3. Get cost and hour entries against individual products 152

6.2.1 Defining and allocating hourly rates

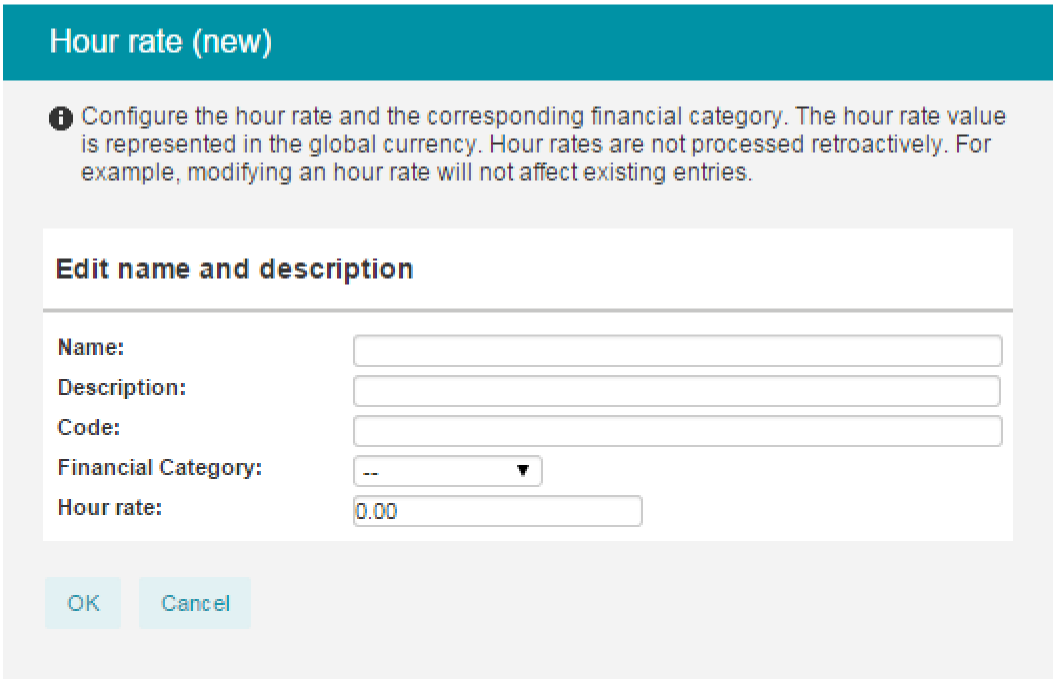
Defining hourly rates

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 '**+**' 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).

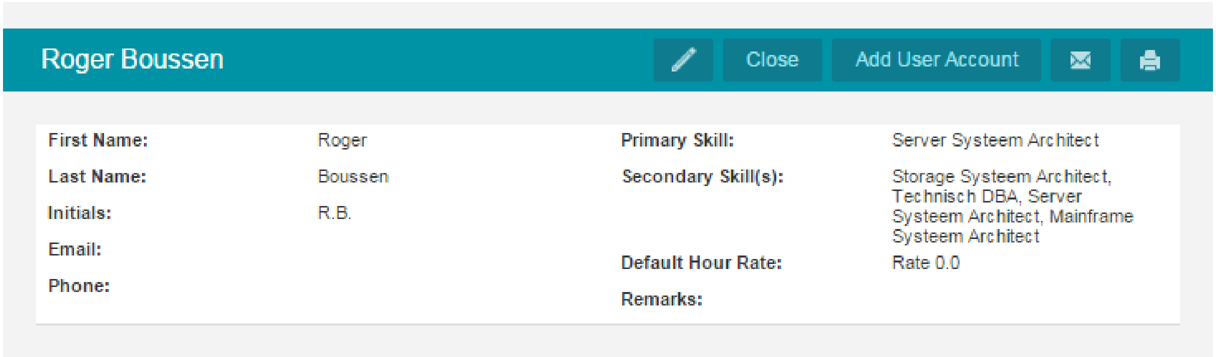


New hour rate

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.



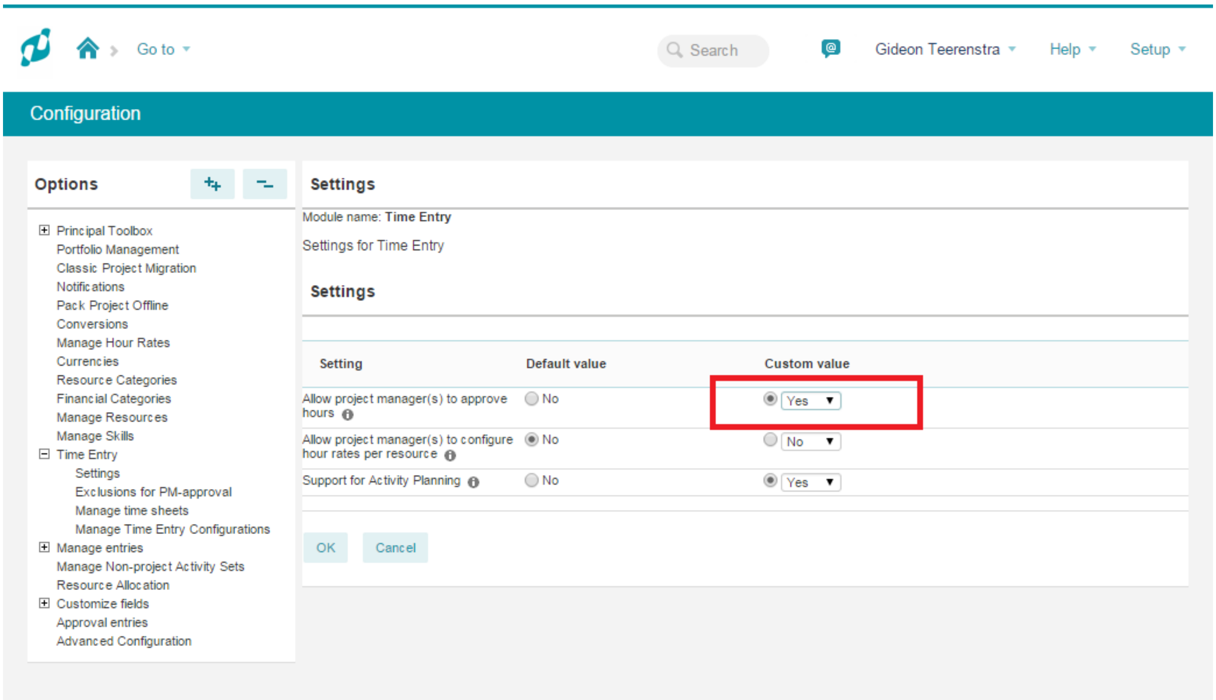
Managing resources

6.2.1.1 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**'.



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 **'Configuration**

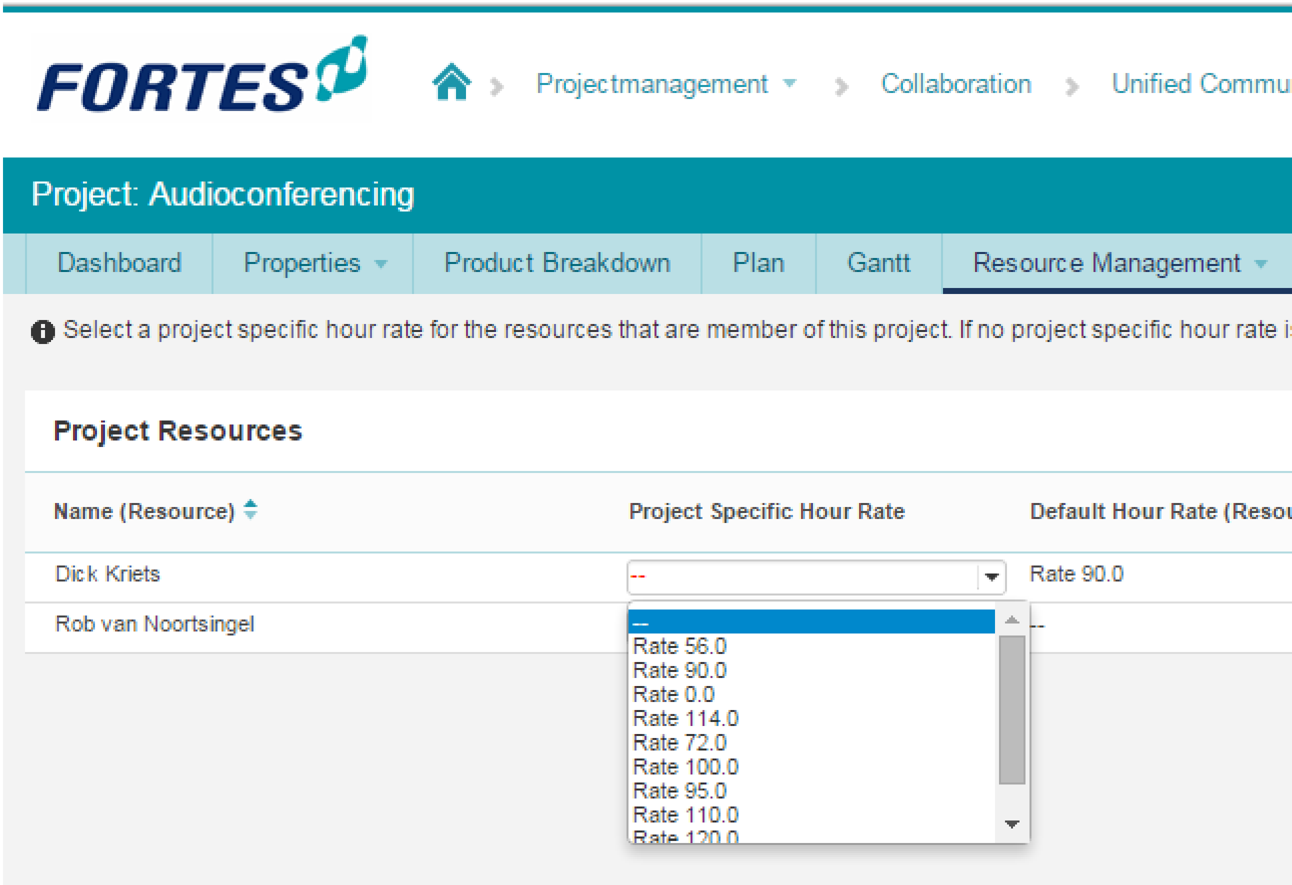
3. Enable the setting **'Configuration of hour rates per resource by project manager'.**

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'**

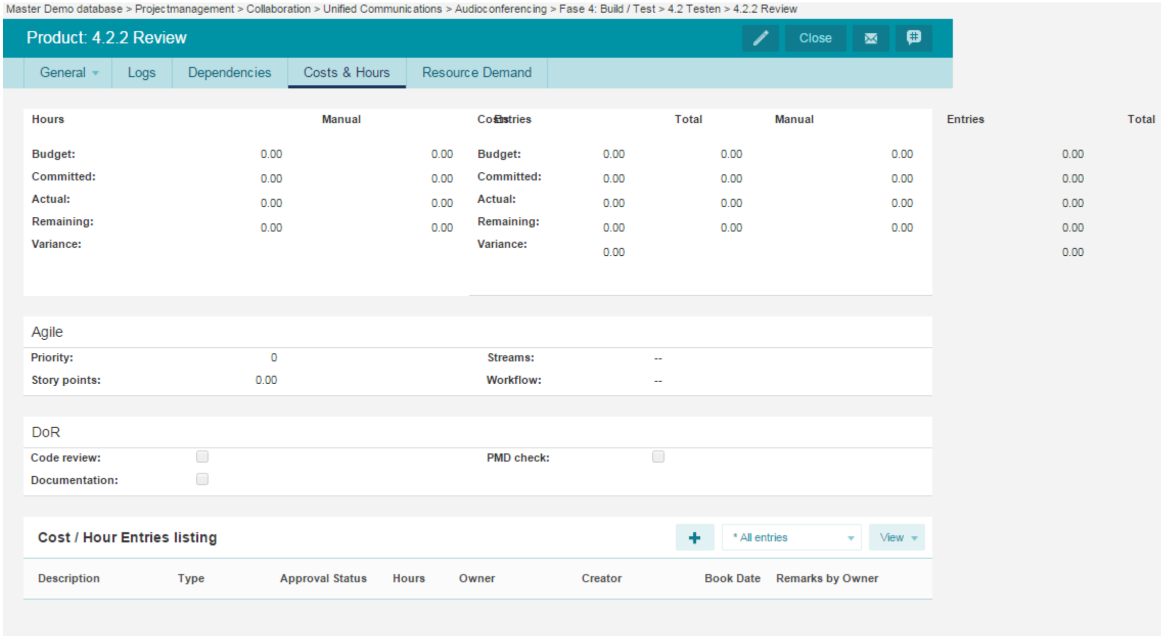
2. Press the **'Edit'** button and set the required hourly rate for each resource on the project.



Assigning project specific resource rates

6.2.2 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.



Cost & hours tab on products

7 Resource Allocation (add-on)

As of release 8.0 of the Principal Toolbox, organisational units have been introduced. This introduction has had a significant impact on the processes of Time Entry and Resource Management (previously Resource Allocation), if your current version is prior to release 8.0 the functionalities of these modules can be found in the old version of the manual. As a result of this there is no longer the need to configure resource pools since the organisational unit for which you activate the Time Entry Module acts as such.

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

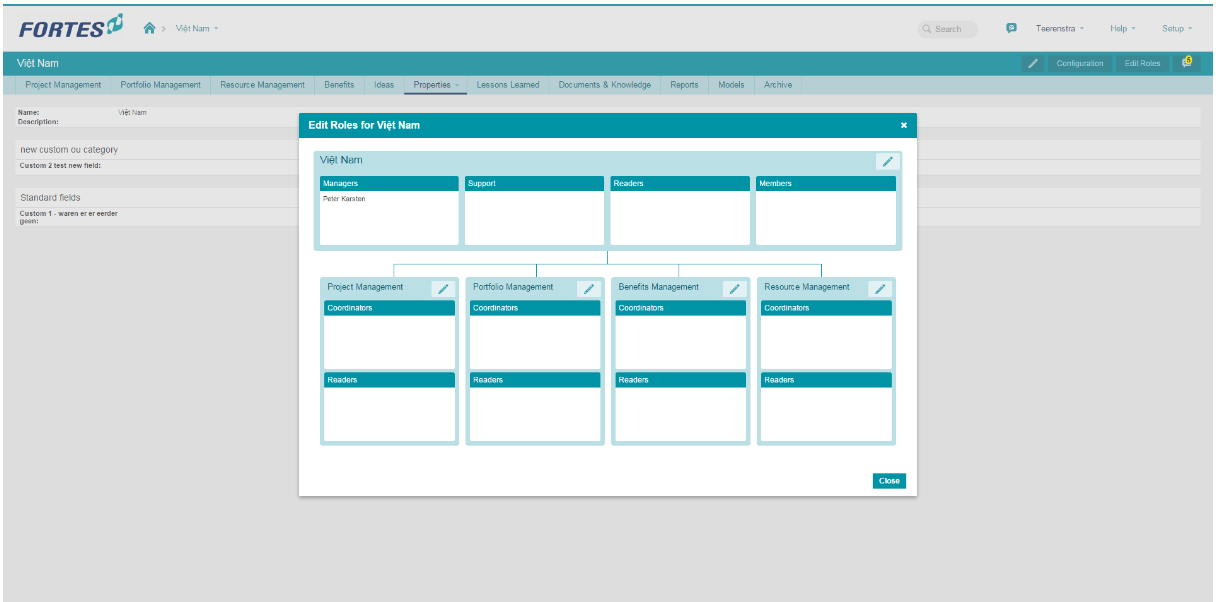
Two roles are associated with this process:

- 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 management coordinator** (or '**resource coordinator**' for short) is the coordinator of one or more organisational units. 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 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 appropriate organisational unit's dashboard and click on Edit Roles.*



Edit members for Resource Allocation

Before starting it is important to navigate to the appropriate organisational unit and activate Resource Allocation for this organisational unit.

Note: In versions prior to 8.0 it was necessary to define resource pools for time entry, these are replaced by organisational units. The organisational unit for which resource allocation is activated is your resource pool. For more information see the Organisational Units 14 *section of the manual.*

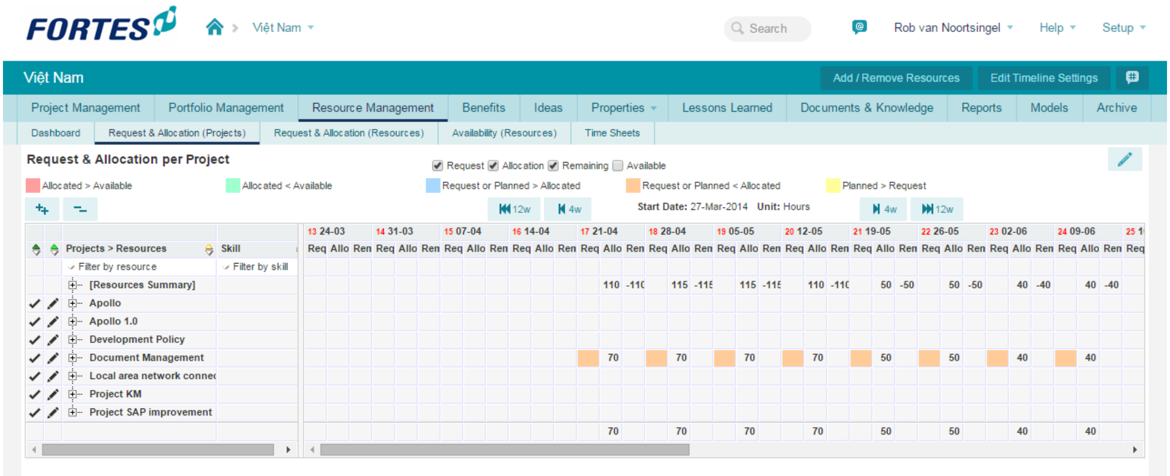
7.1 Managing resources

Pending resource allocation requests are managed by a resource allocation manager.

1. Navigate to the Resource Management tab of the organisational unit 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 cell3s in this grid are colour coded to provide a quick overview:

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



Overview of the entire resource pool

> ***Note:*** *The columns with planned, requested, and allocated hours can be toggled on and off by checking or unchecking the check boxes 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.*

3. 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.

7.1.1 Adding skills & resources

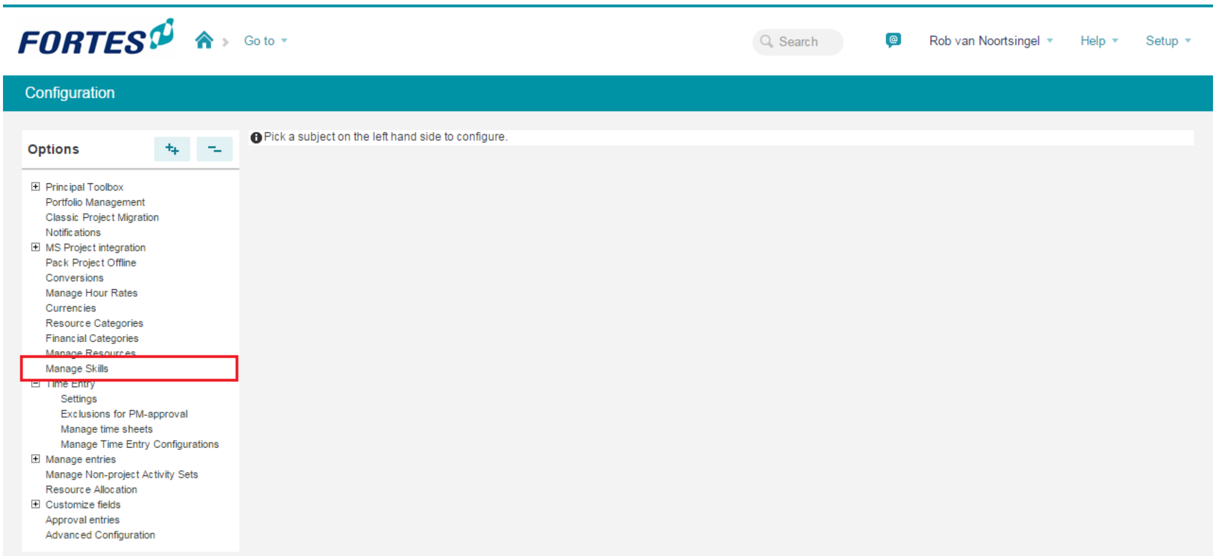
Before you are able to request and allocate resources you will have to define one or resources. To do this, you will have to define skills and then appoint these skills to resources. After you have done that, you can add resources.

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. This allows you to report on skills over multiple resources.

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**'.

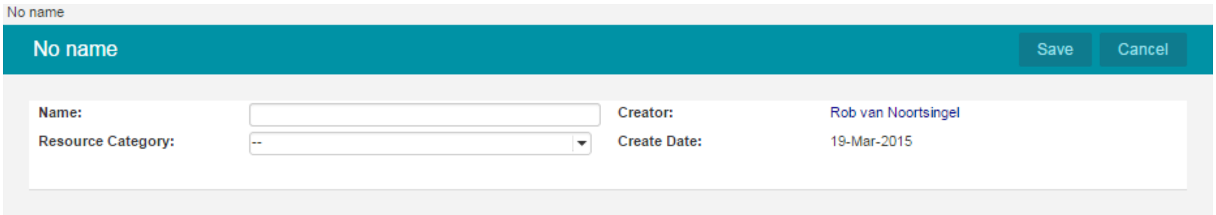


Manage Skills at Setup

3. To add a new skill: Click + 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.

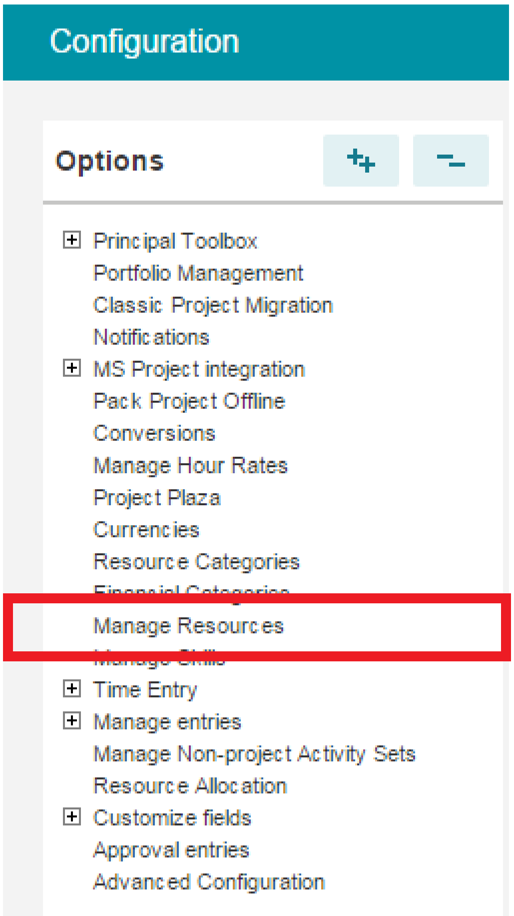


Adding a skill

Adding new resources in Principal Toolbox

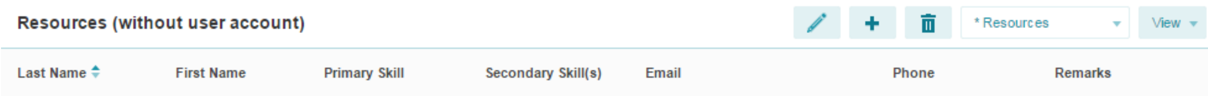
Before resources can be appointed, resources and their skills need to be defined in the Principal Toolbox. Users are automatically available as resources, additional resources can be defined by a resource manager as follows.

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**'.



Manage Resources at Setup

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

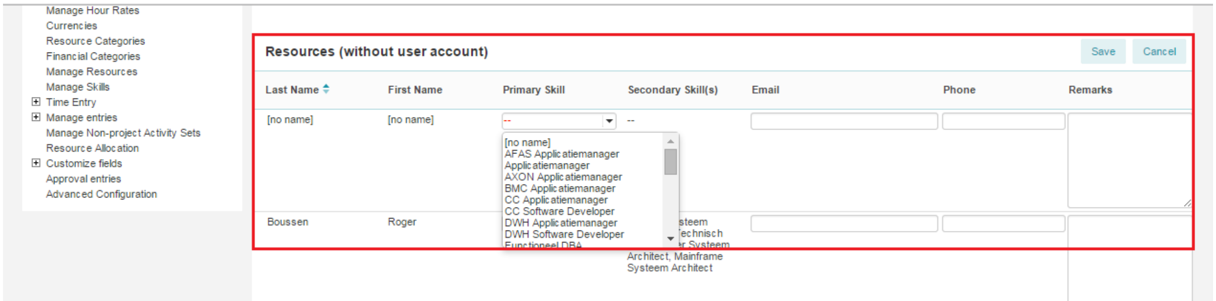


Creating a new resource (no user)

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)'.

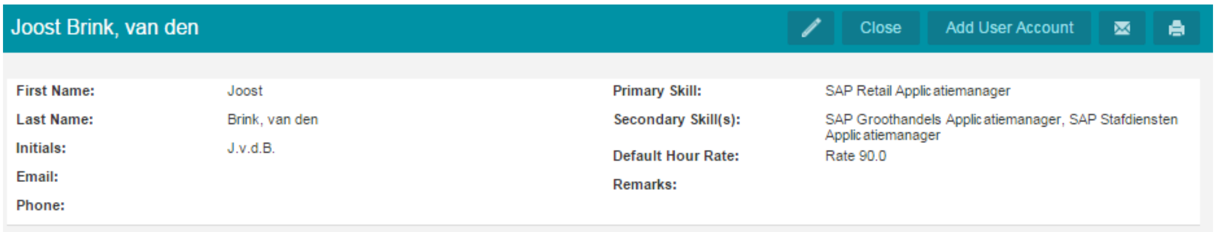
Appointing primary and secondary skills to resources

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.)



Appointing a primary skill

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



Appointing a secondary skill

3. Click **Edit** to modify the resource details, including the primary and secondary skills.

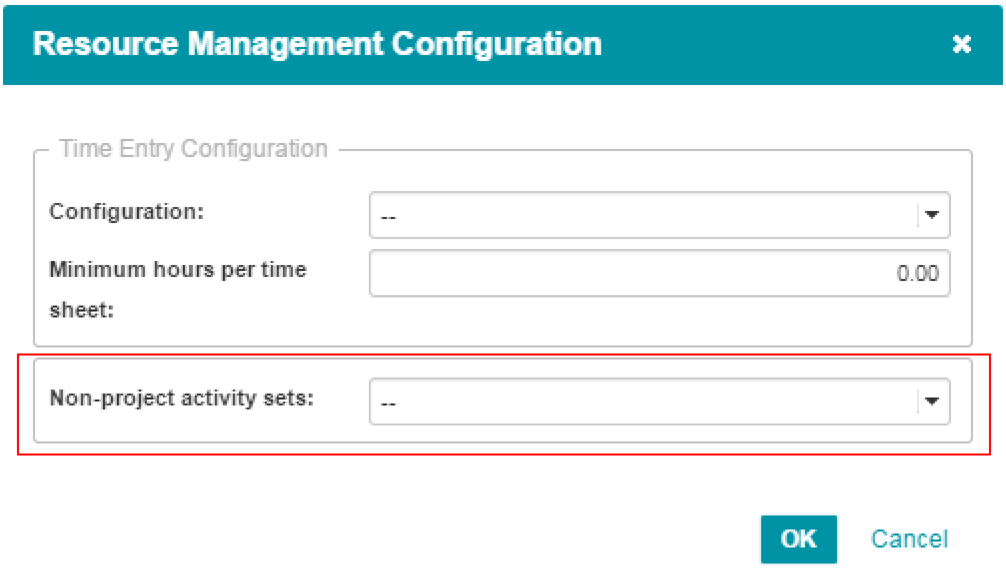
4. Click **Save** to save the modifications, and click **Close** to return to the main window.

7.1.1.1 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 sets of non-project activities need to be defined.

1. Navigate to the **Resource Management** Tab in the appropriate organisational unit.

2. Click **Resource Management Configuration** to select the appropriate Non-project activity set.



Select a non-project activity set

3. Click **OK** to return to the main window.

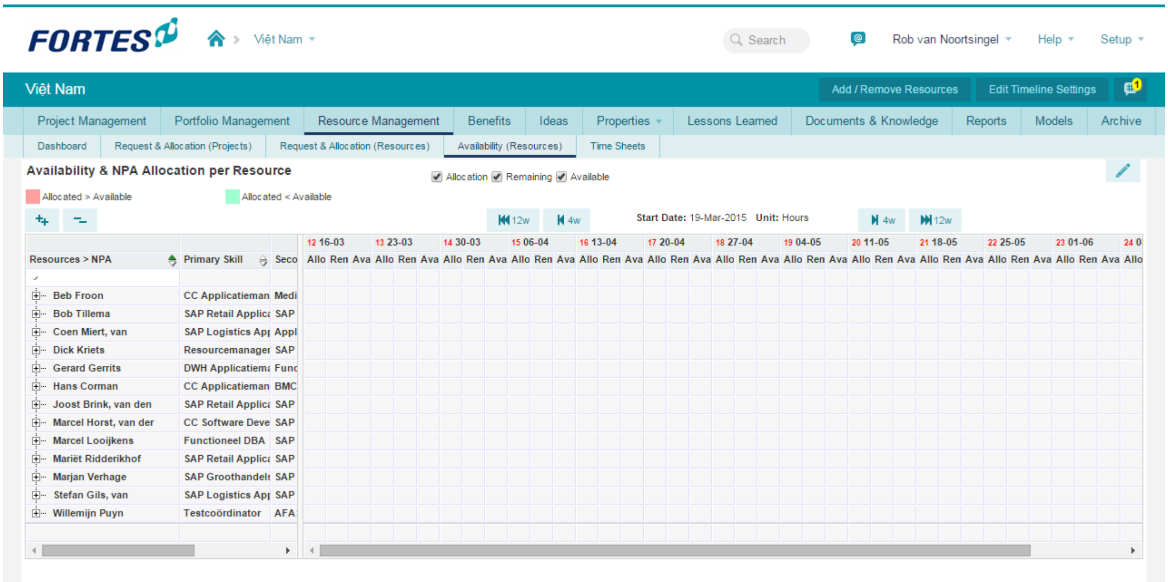
Creating non-project activity sets 217 is part of the **'Configuration'**. For more information click on System Administrator: Setup & Settings 214

7.1.2 Managing resource availability

The resource availability can be managed by the resource manager.

1. To edit availability of resources in an organisational unit, navigate to the **Resource Management** tab of the appropriate organisational unit.

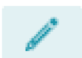
2. Click on the tab "**Availability (Resources)**". A grid with the allocated hours, remaining hours and available hours is shown.

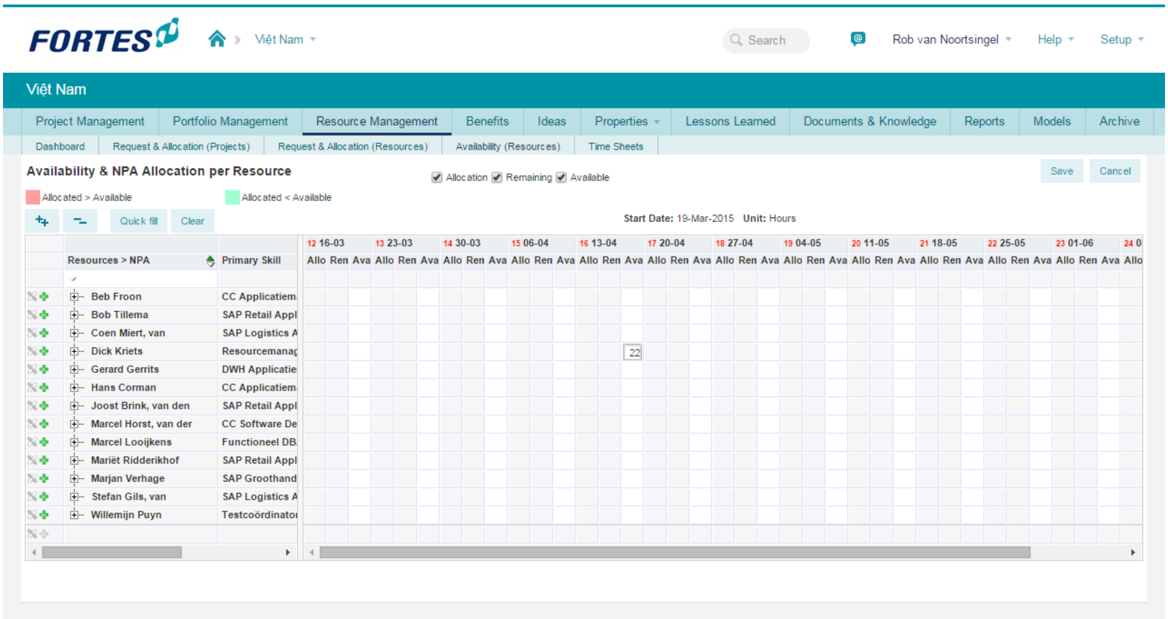


Adding the resource availability

> ***Note:** The columns with allocated, remaining and available hours can be toggled on and off by checking or unchecking the check boxes 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.*

3. Click  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



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.

7.1.3 Managing requests and allocations

A Resource Coordinator is responsible for evaluating all resource requests that are coming in, and turning them into allocations.

1. Open the '**Request & Allocation (Projects)**' tab in the appropriate organisational unit (Resource Management tab).
   It will display a planning board with requested and/or planned, allocated and remaining hours for each resource.

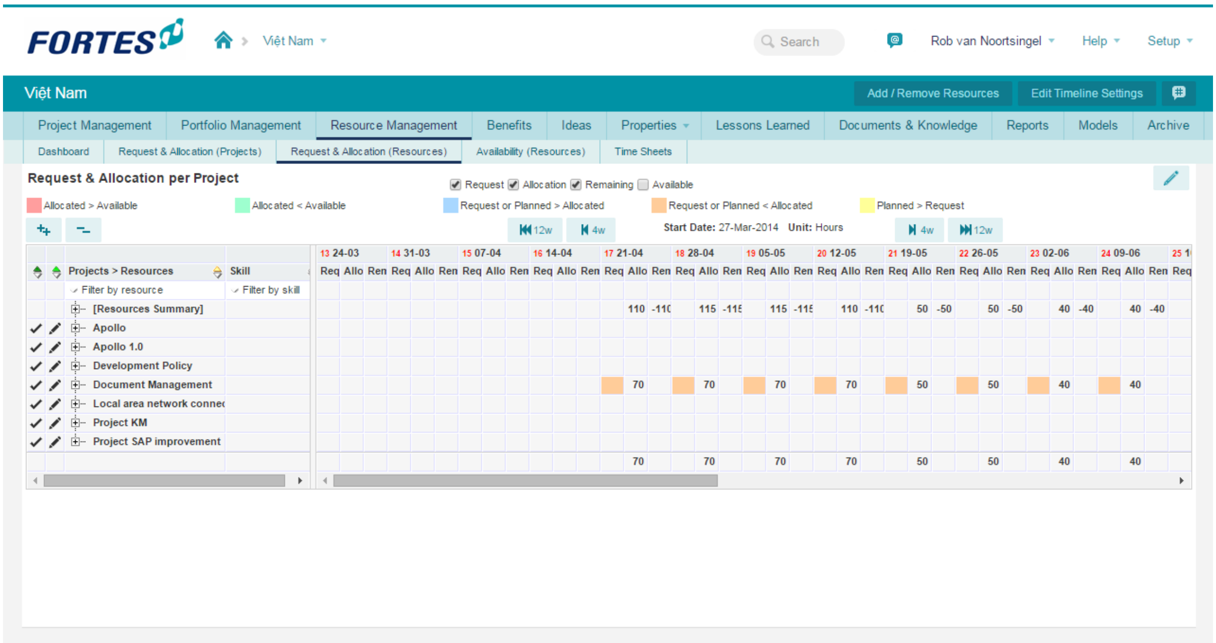
   ***Note**: depending on the chosen resource allocation process, the button 'Edit Timeline Settings' allows for changing whether planned and/or requested hours are being displayed. To make the change, set the '**Resource Allocation Process**' to one of '**Project request driven**', '**Project demand driven**',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



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 check boxes*

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

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

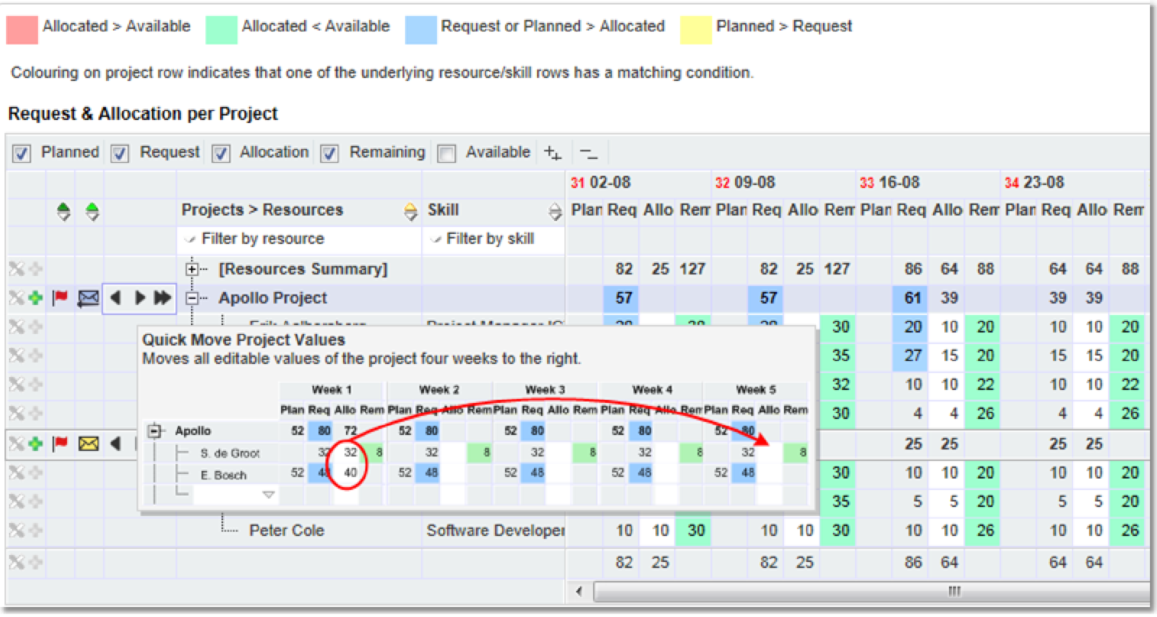
   Use the  to check the details per individual resource on a project. By expanding the **'Resources Summary'** it'll show the total allocation per resource independent of the projects.

3. 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.*

4. 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 (**>>**) .*



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:

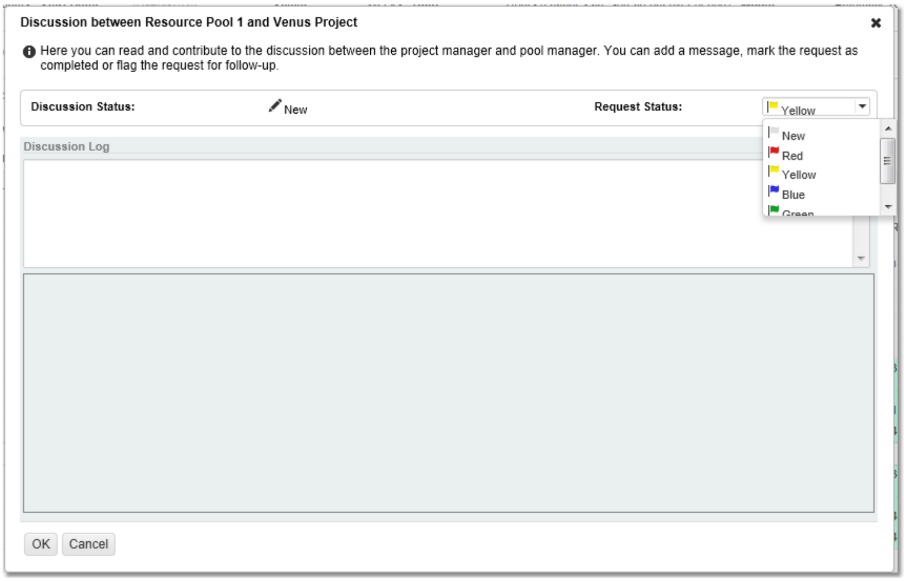
1. From the resource allocation module, open a resource pool and navigate to the **'Request & Allocation'** tab.

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

Opening a discussion log

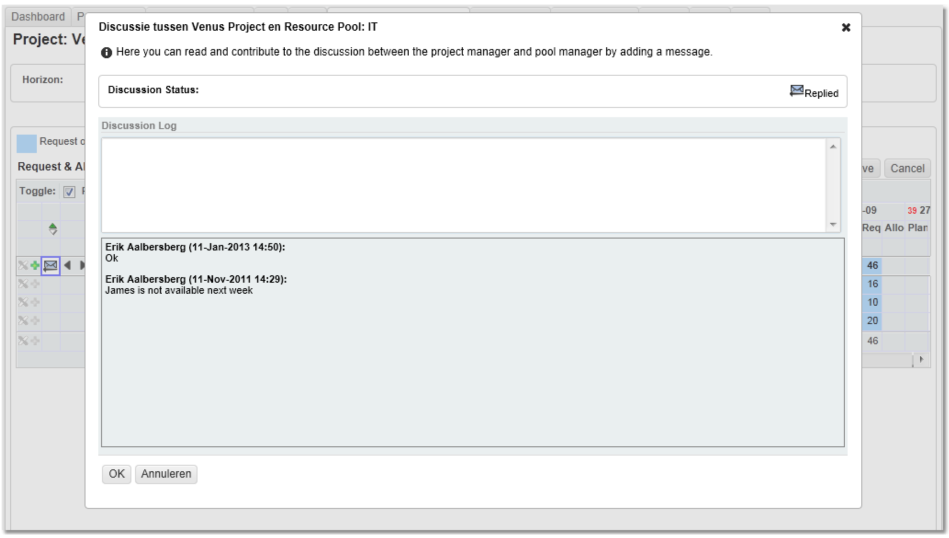
4. A chat session is opened in which the resource manager can enter a message for the project manager.



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.



Discussion log on projects

7.2 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.

7.2.1 Requesting resources

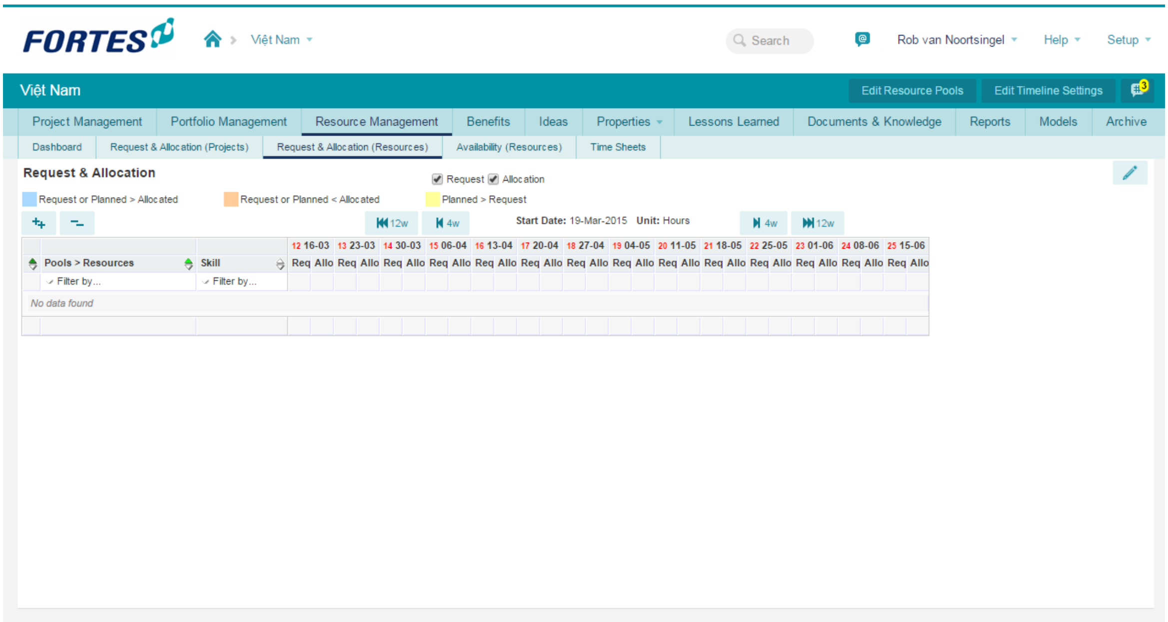
1. In an organisational unit or project, navigate to the “Resource Management” tab, section “Resource Allocation”. In the “Request & Allocation” section, a grid is shown with planned, requested, and allocated hours. Blue cells indicate resource requests that are not yet (fully) fulfilled with allocated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

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

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

2. To assign one or more resources to the project (only needs to be done once for every project, or whenever changes are required), click **Edit Resources** on the Resource Management dashboard. A popup window will appear in which one or more available resources can be assigned to the project.

3. In the header of the “Request & Allocation” section, click **Edit** to start requesting resources for the project.



Requesting resources on a project

4. To add a row in which a resource or skill request can be entered, click on the  in front of the appropriate resource pool. To request a resource, perform one of the following steps:
    a. To request a specific ‘named’ resource, select a resource name from the drop down menu in the resource name field underneath the appropriate resource pool. Optionally, select the skill that the resource is requested for in the drop down menu in the skill field next to the resource name field.
    b. To request a skill instead of a specific resource, select a skill name from the drop down menu in the skill field. The resource coordinator 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 Coordinator.

7.2.2 Planning resources

> ***Note****: The new generic project planning* 78 *provides a different approach, please refer to the help there* 82*.*

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

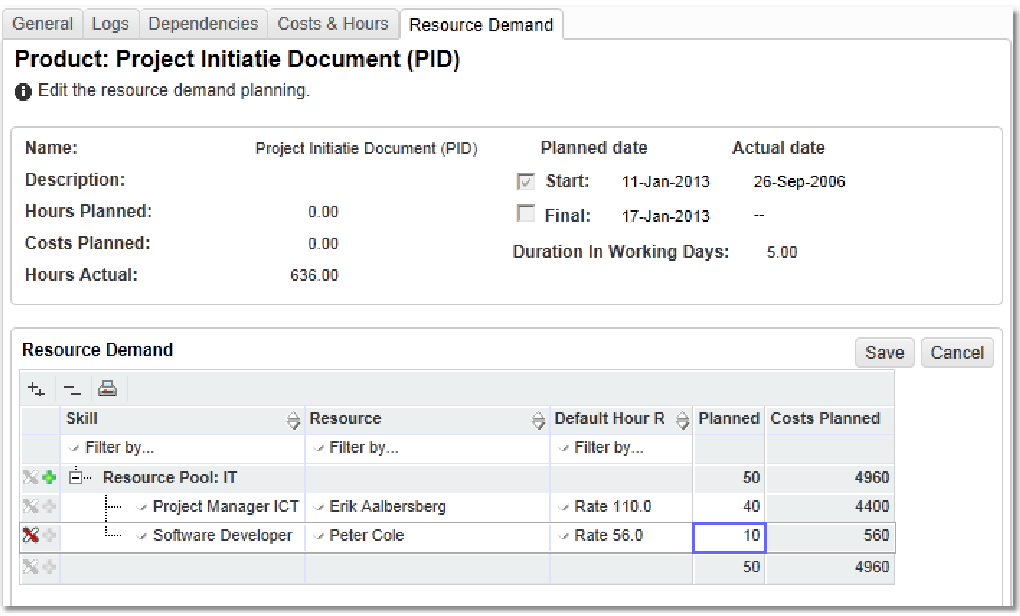
1. Open one of the products on the project and navigate to the tab **'Resource Demand'**.

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* *'Letting project managers choose hourly rate'* 150 *for instructions on how to set the appropriate rate.*



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.

8 Reporting

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

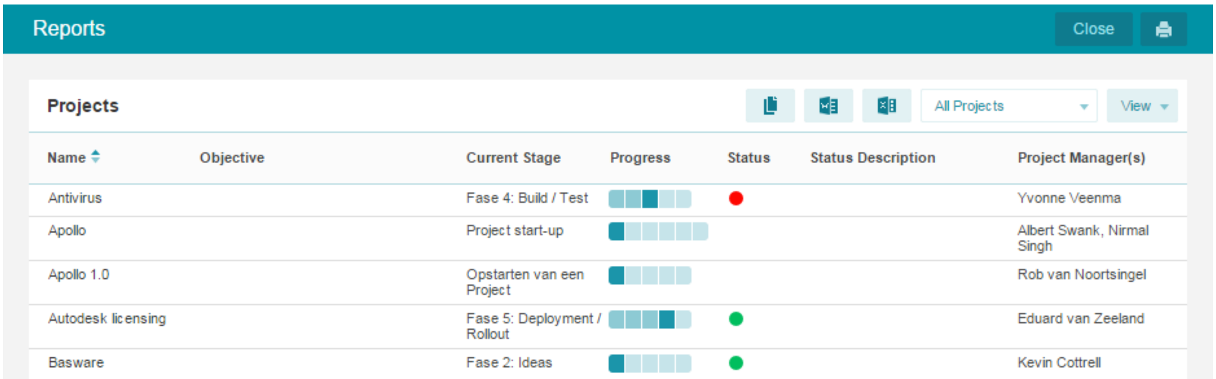
- General reporting 165 is provided throughout the application and is based on the ability to create views on all kinds of data.
- When working with hours and costs, it is also possible to create timeline reports 170 that provide options to report data in respect to the book date of the hours and costs.
- Based on these reports (general and/or timeline), automated reports 174 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 widgets 188, dynamic functionality provided on dashboards that show the data in a specific way.

8.1 Reports

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

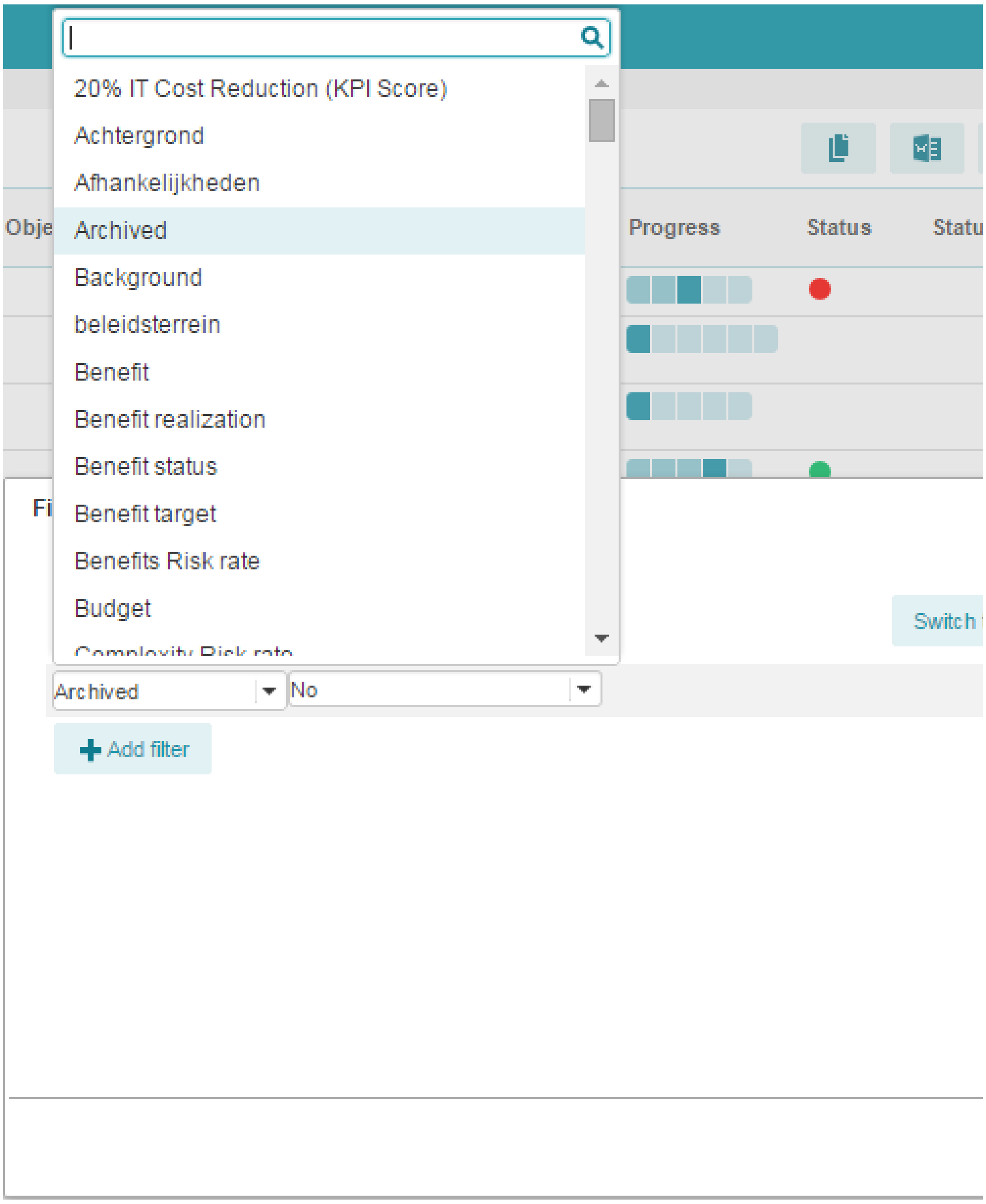
> ***Note**: Timeline reports provide a special way of reporting over costs and hours, see timeline reports 170.*



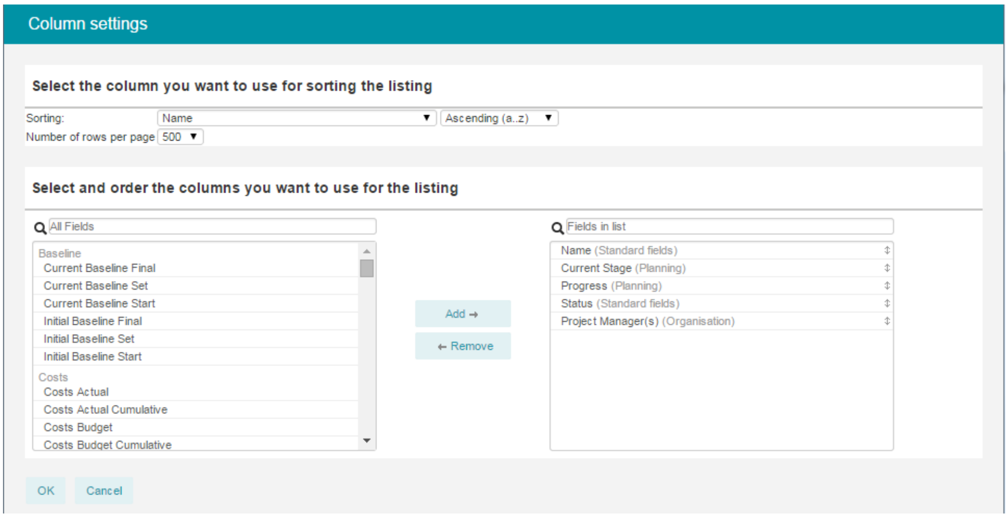
Basic project report

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

Option	**Remarks**
Set filter	The set filter options allows to select fields available for the object that is being reported.



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



Set widths

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

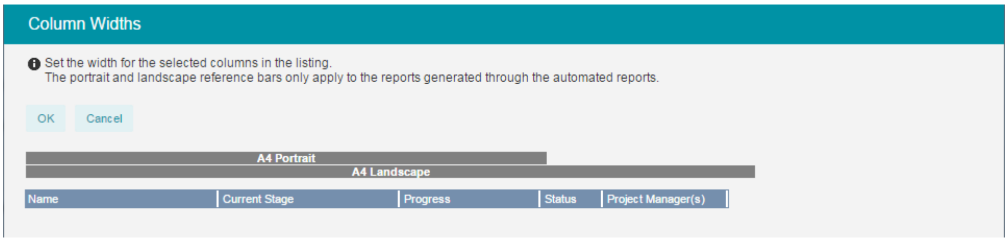
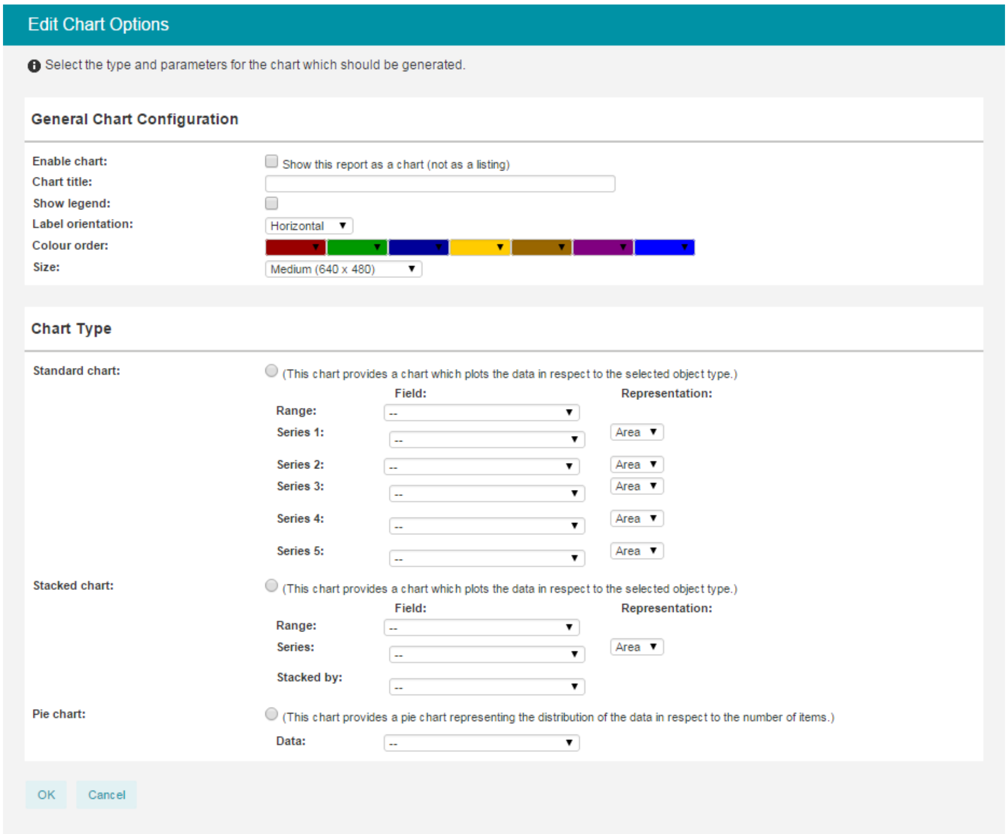
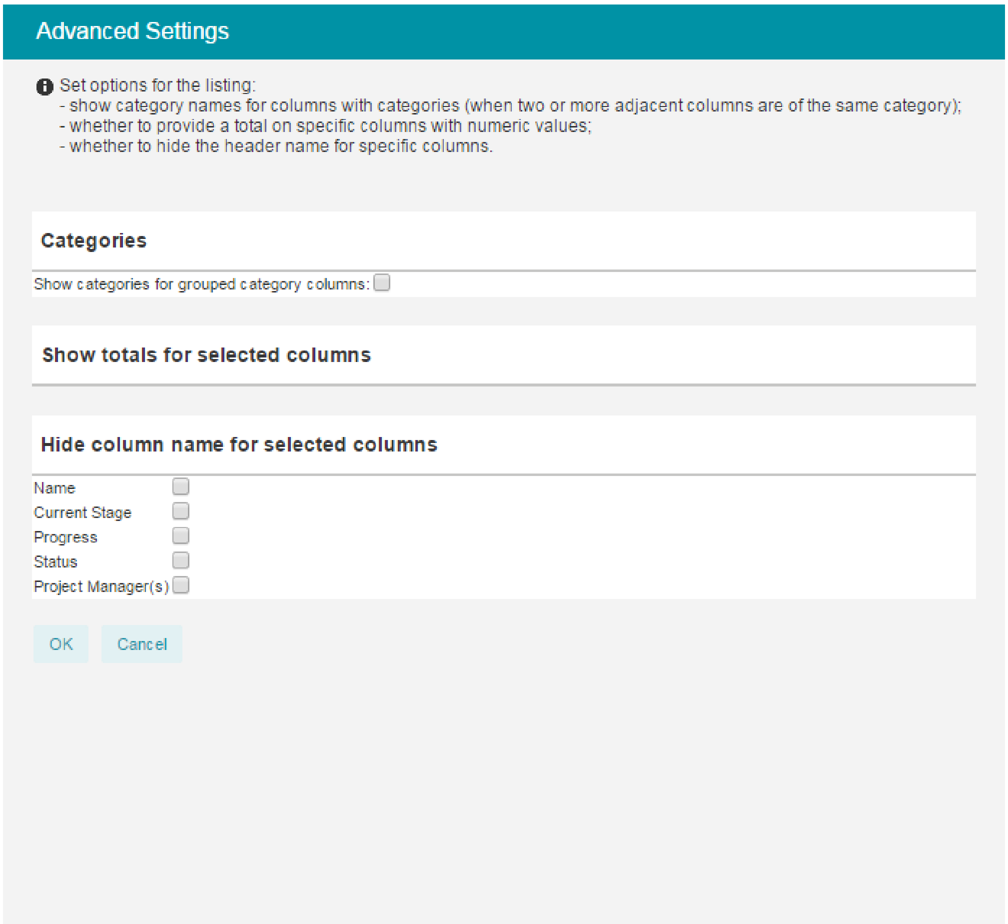


Chart options*

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

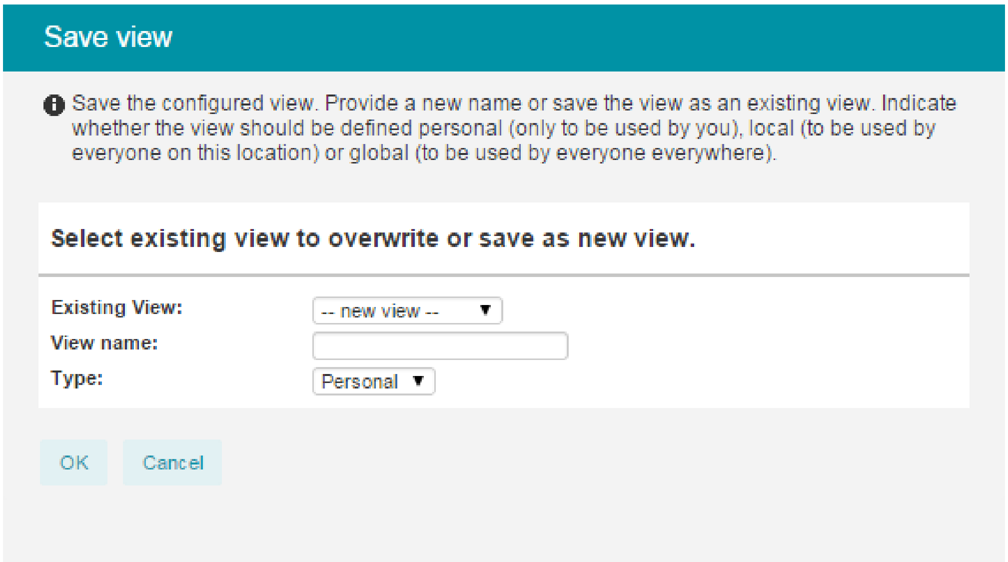


Advanced Finally, some special options can be set like hiding a header caption, provide a total etc.



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

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



Views can be set to one of the following types:

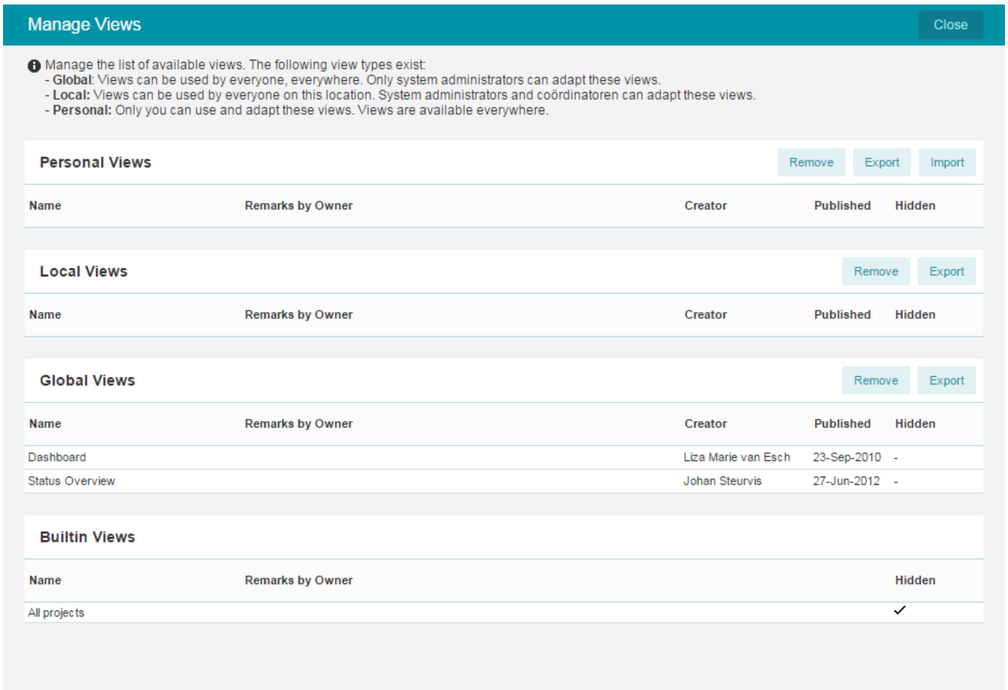
Personal The view is available to the current user only but can be used throughout the application (for the same type of object). This option is available to all users.

Local The view is available to the current location only but can be used by everyone (that has access to 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.

Make default — Sets the current selected view as default (for the current user only!). Default views are indicated by an asterisk (*) behind the name of the view in the view selector.

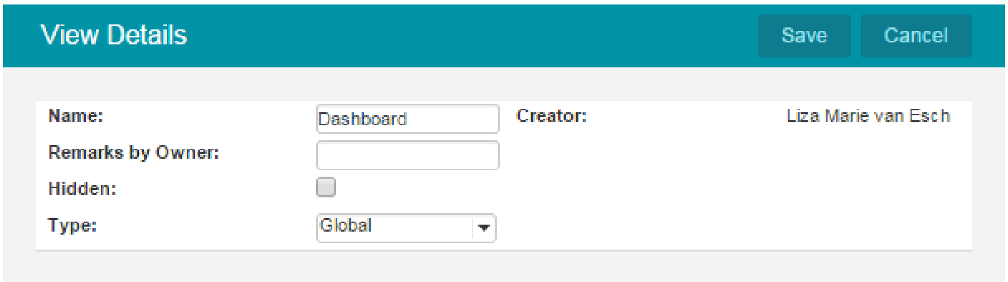
Manage views — To manage all views that have been created at a specific location (or for a specific user etc.), the views can be managed to remove, rename or alter the global view parameters (like type or hidden).



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':



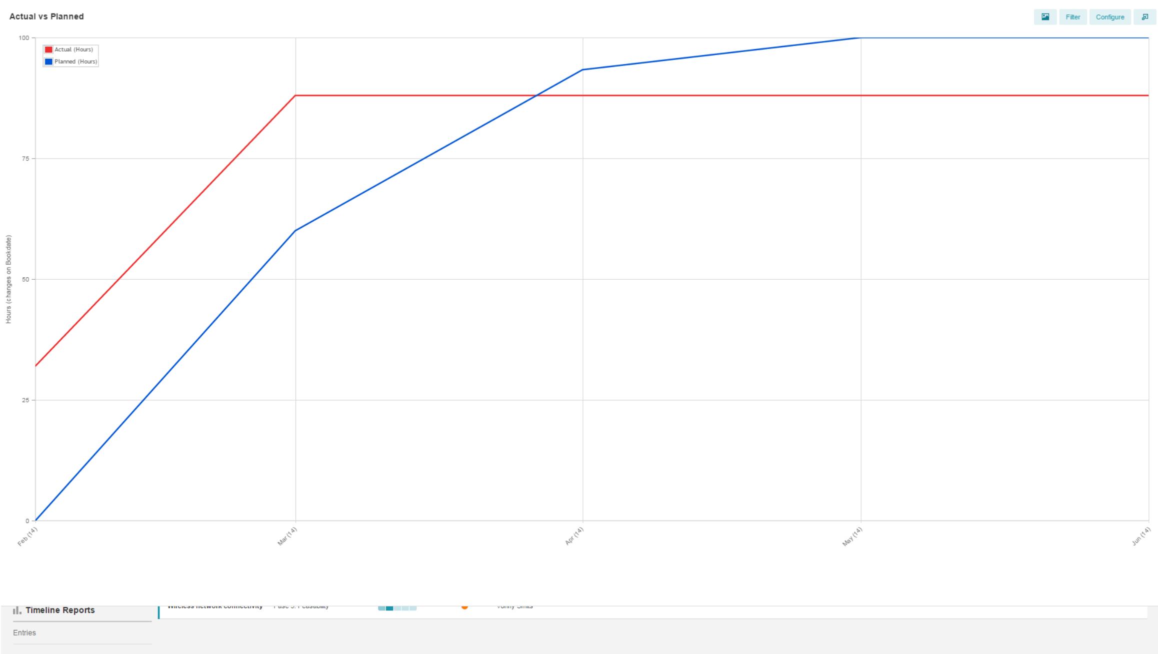
* Will be deprecated in release 7.0

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 automated reports 174.

8.2 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.

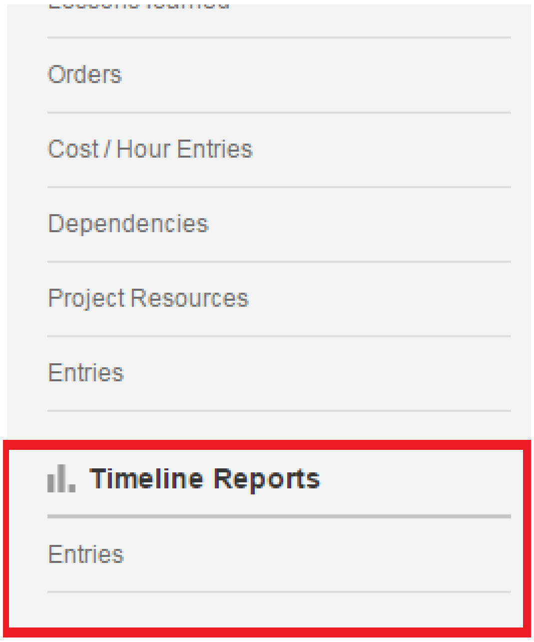
Timeline reports work like pivot-table known from MS Excel. It creates reports on entries coming from time registration, cost entries and resource management.



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.

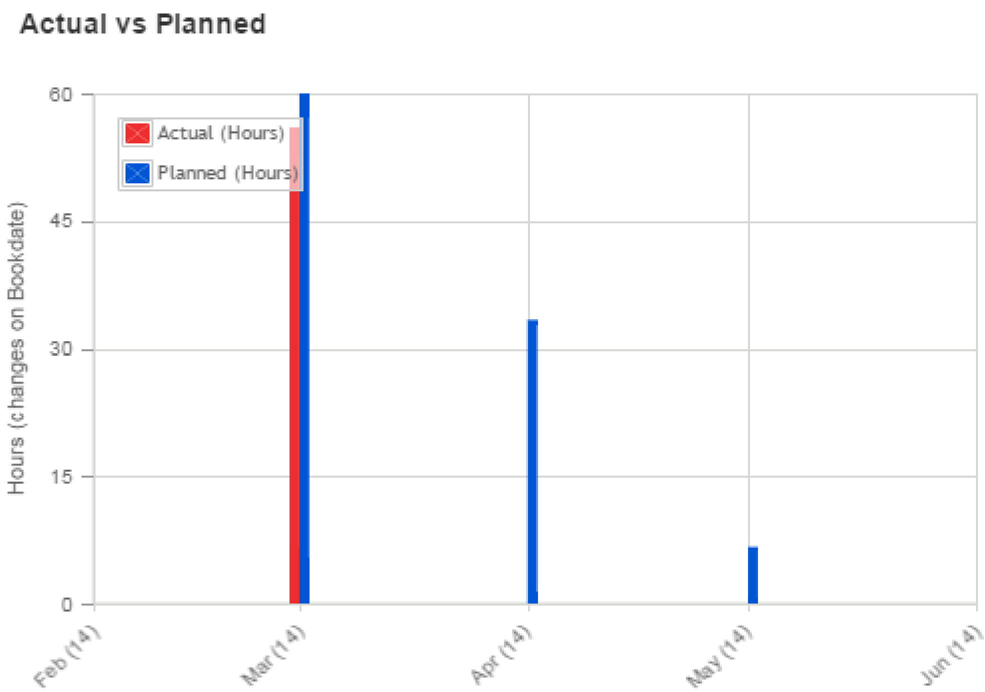
The timeline reports can be found on the same location as the normal reports. So they are available enterprise-, folder-, portfolio- and project level. They are also available in the different modules like time registration and resource management.



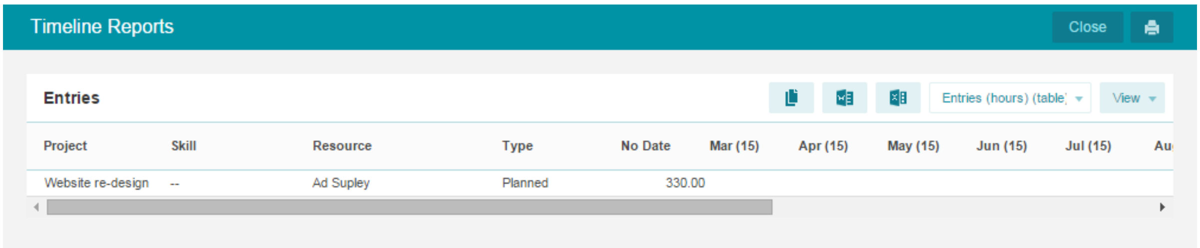
Two representation types are available:

- table
- chart

Timeline report views can be used in automated Excel and Word reports.

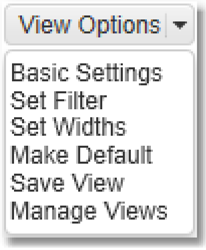


Example: Timeline Report Chart



Example: Timeline Report Table

The different options in the **View options** menu are:



Basic Setting	:	To configure the timeline report view
Set filters	:	Define a filter to make a selection of the shown items
Set widths	:	Set the column width, so the view fits better on screen or in a MS Word report. Drag the line between columns to increase or decrease the column size.
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 30'.

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

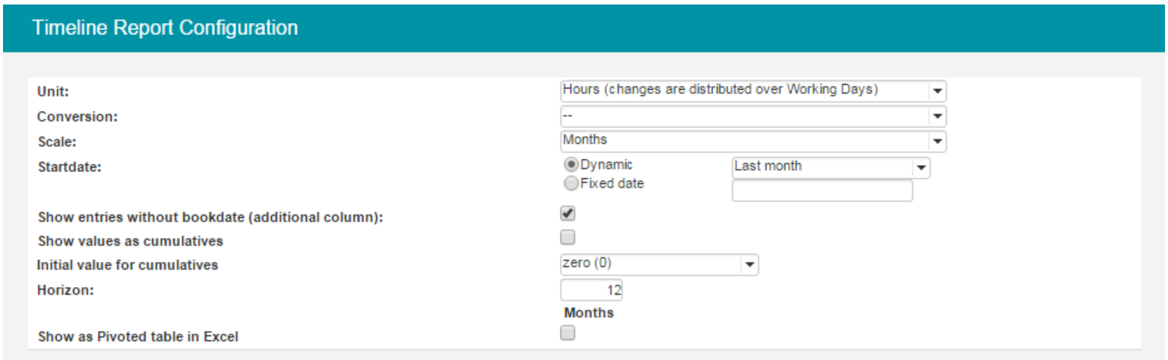
3. Open '**view options**' and choose '**Basic Settings**'

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.

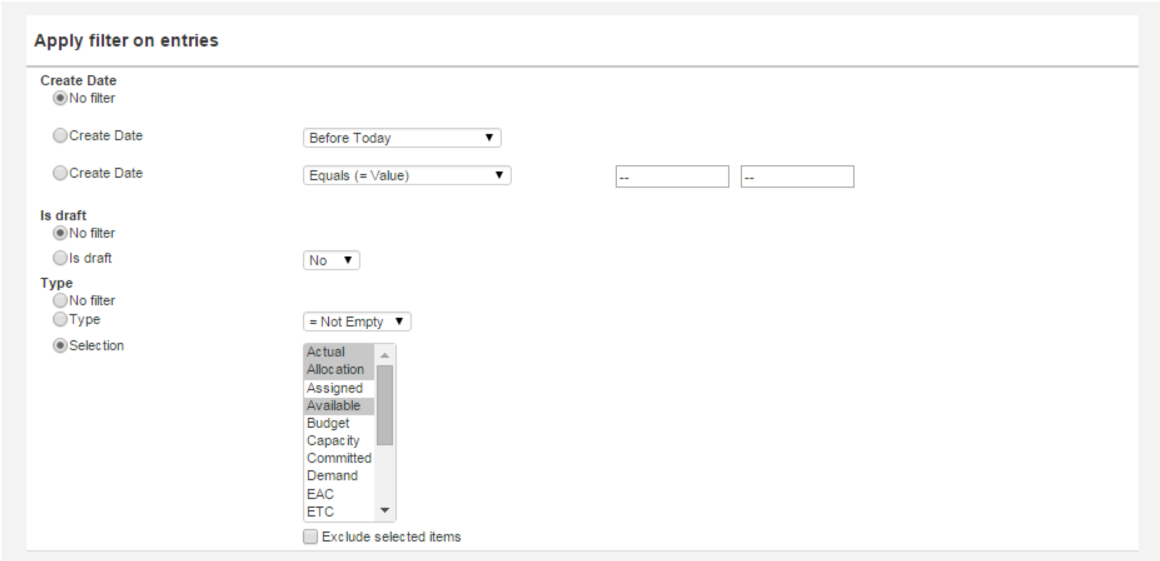
   b. Scale: set scale to weeks to show the costs per week.

   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.

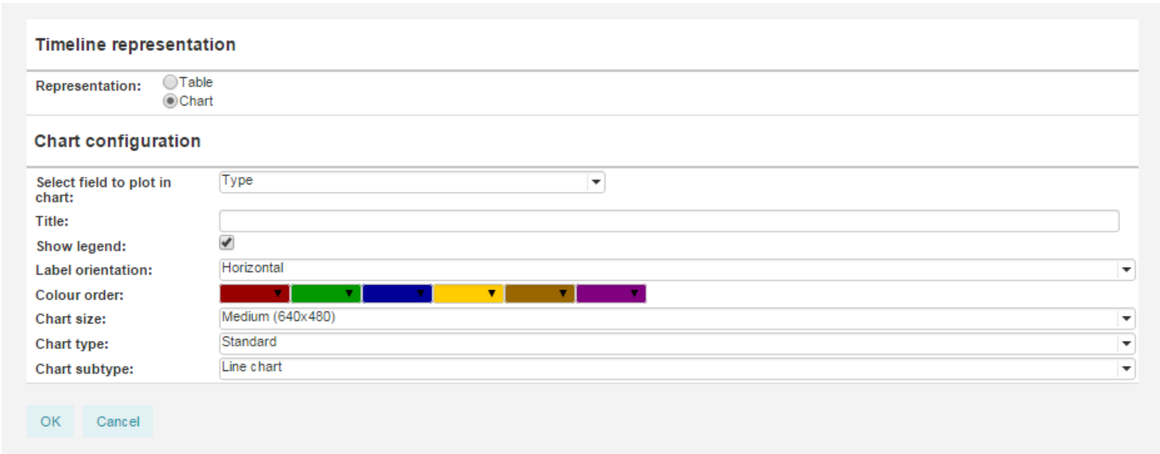
   d. Horizon: set the number of weeks, months or quarters to show starting at the start date.



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.



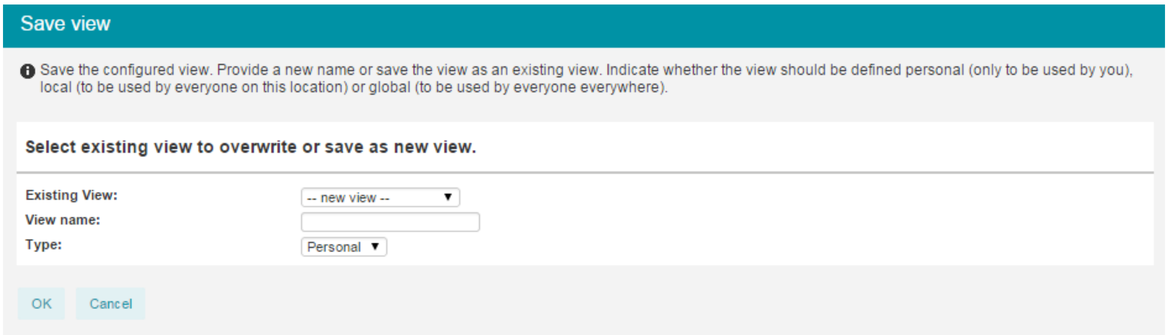
6. Select ‘**Table**’ as the representation type to get a table with the budget and actual costs



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.



Save view

Select personal, local or global. See manage views 30 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 30.

8.3 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 folder level they are available to the folder manager.*

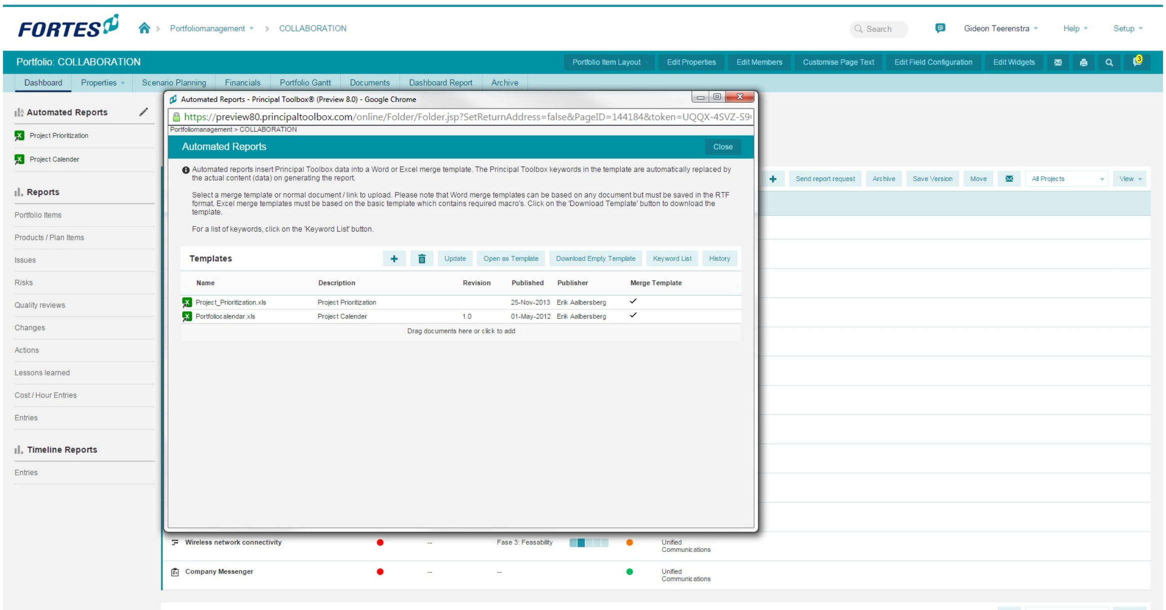
> ***Note**: Normally, automated reports will be provided with the project model(s) of your organisation. It is possible, however, to create your own reports for your folder, portfolio or project.*

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.

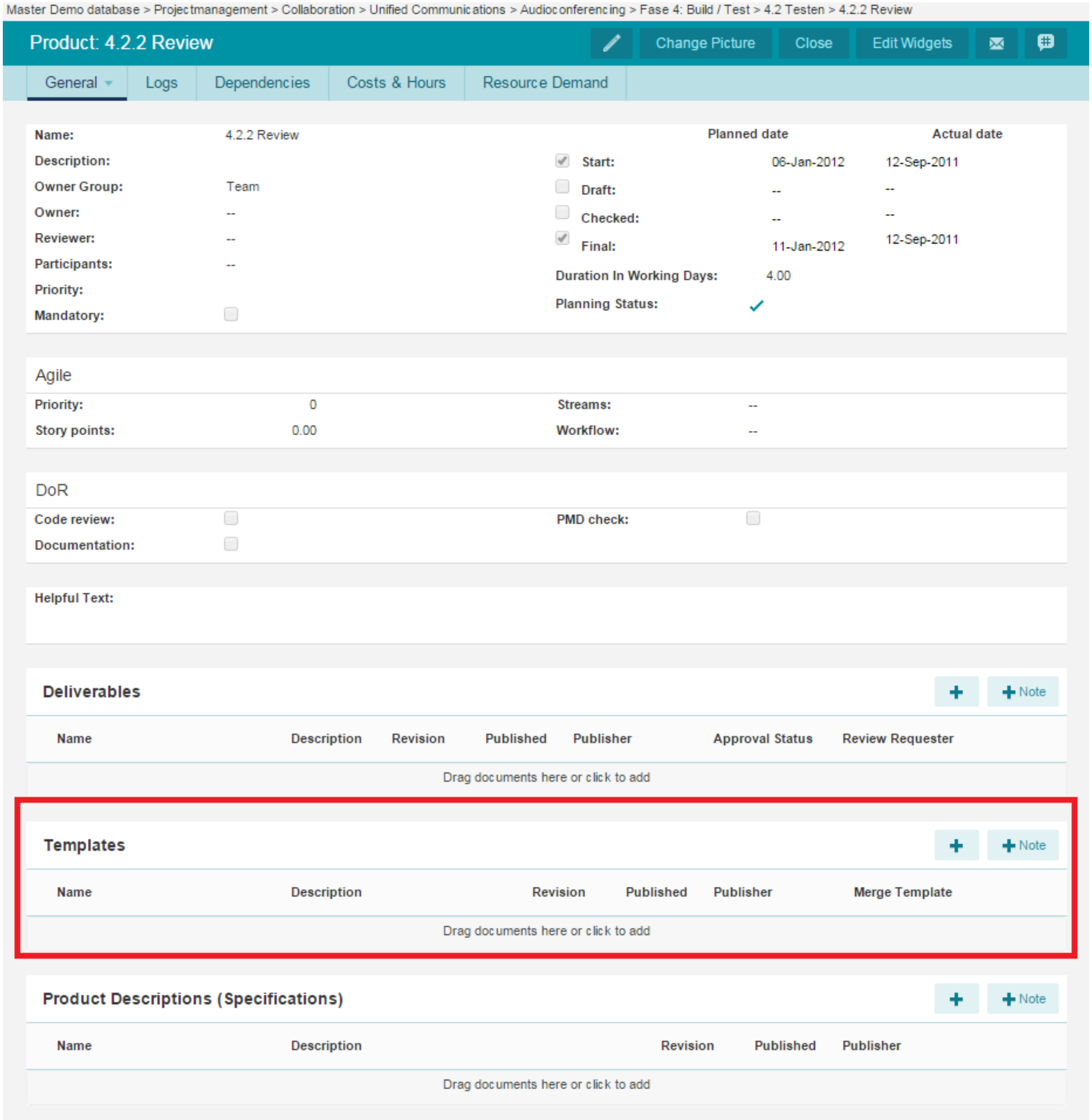
> ***Note**: Some applications empty the clipboard when they are started up. In this case, first open the application and then click the keyword.*

Where to find and manage automated reports

Within projects:
On the project dashboard in the section 'Automated reports' or at a specific product page.

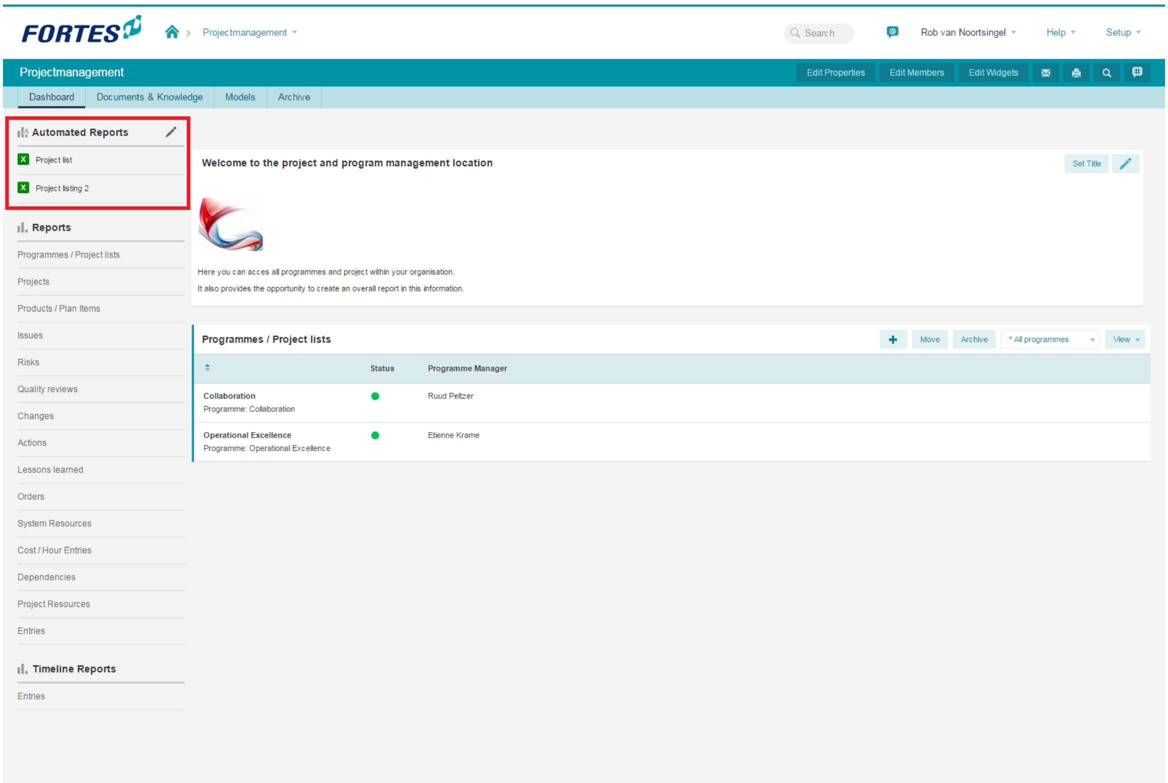


Click ***'Edit'*** *at automated reports to manage reports within a project or project model*



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

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



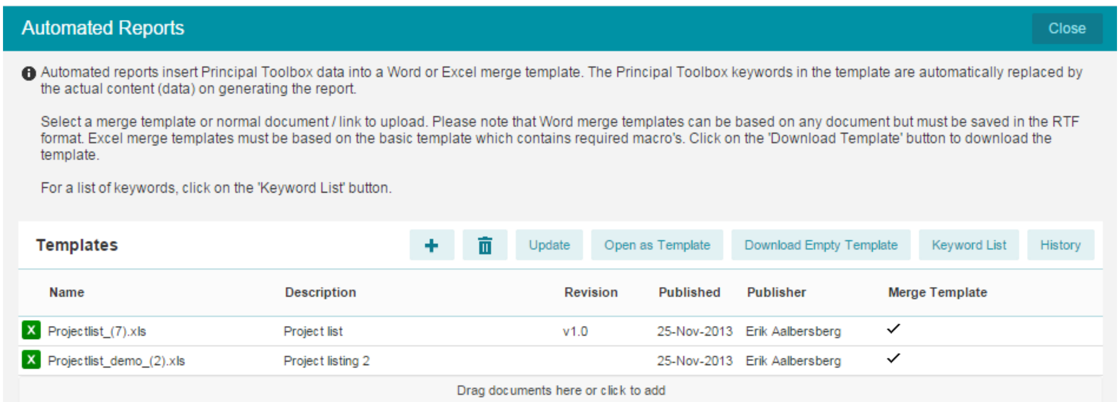
Automated Reports on a folder

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

8.3.1 Automated Word reports

> ***Note***: *Word reports are based on templates that have to be saved as Rich Text Format (*.rtf) files.*

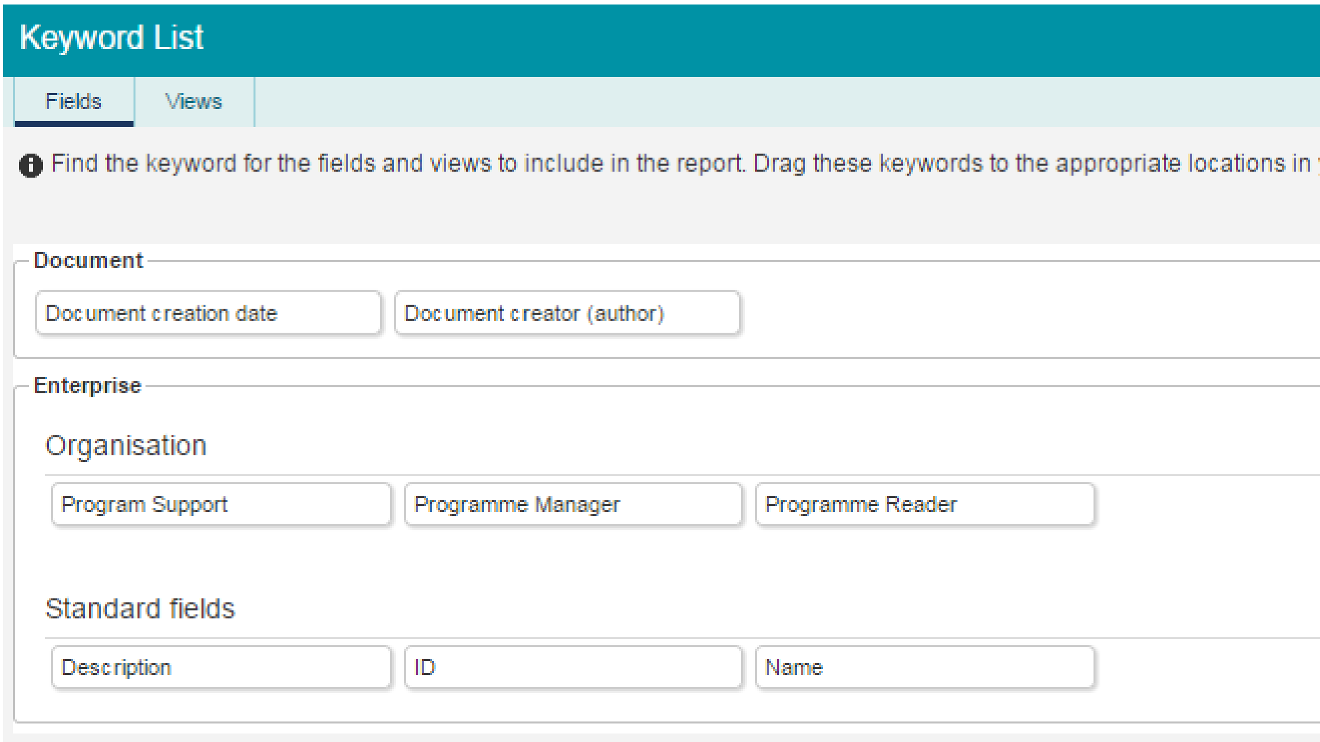
1. Go to the dashboard and click the button '**Edit**' in the Automated report header, or go to the specific 'Product' page where you want to insert the new automated merge report.



2. You can do any of the following:
   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,

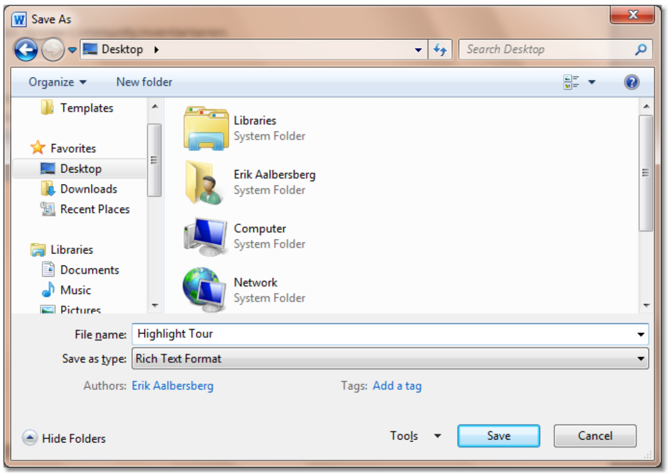
just click it.



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

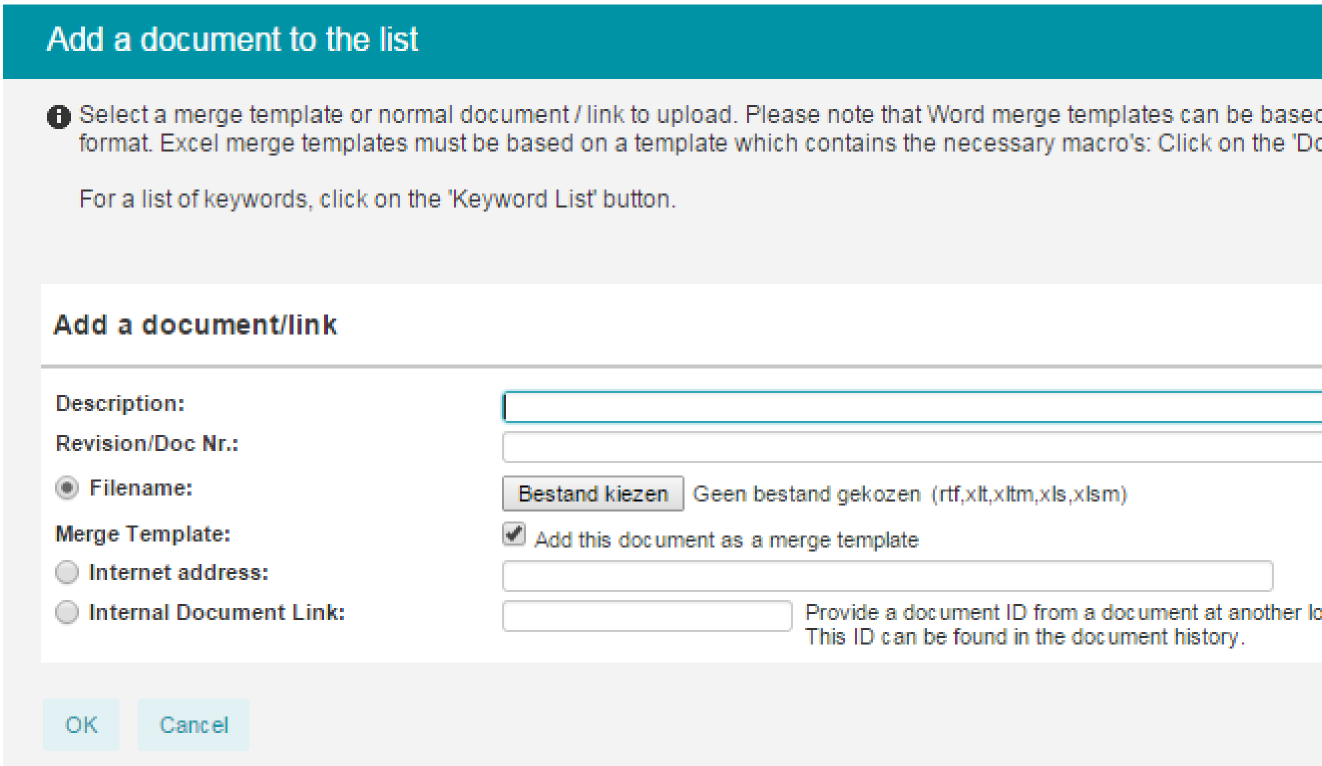


7. Go back to Principal Toolbox. To upload the merge template in the Principal Toolbox, click + in

the Templates section (in the Edit Automated Reports window or on a product page). 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 RTF-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.

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



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 folder / 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.*

8.3.2 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:

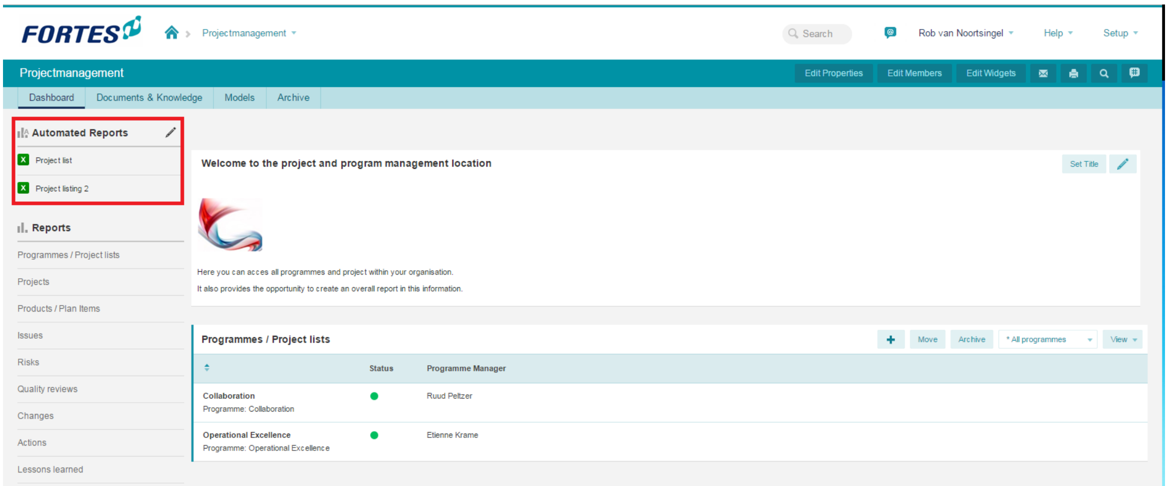
- Using an Excel report 180
- Creating an Excel report template 181

> ***Note**: automated reports within projects are available to project managers and project support. On folder level they are available to the folder 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 here and add it manually to the desired location.*

8.3.2.1 Using an Excel Report

To generate an Excel report, you can click the report name, on a folder / 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.



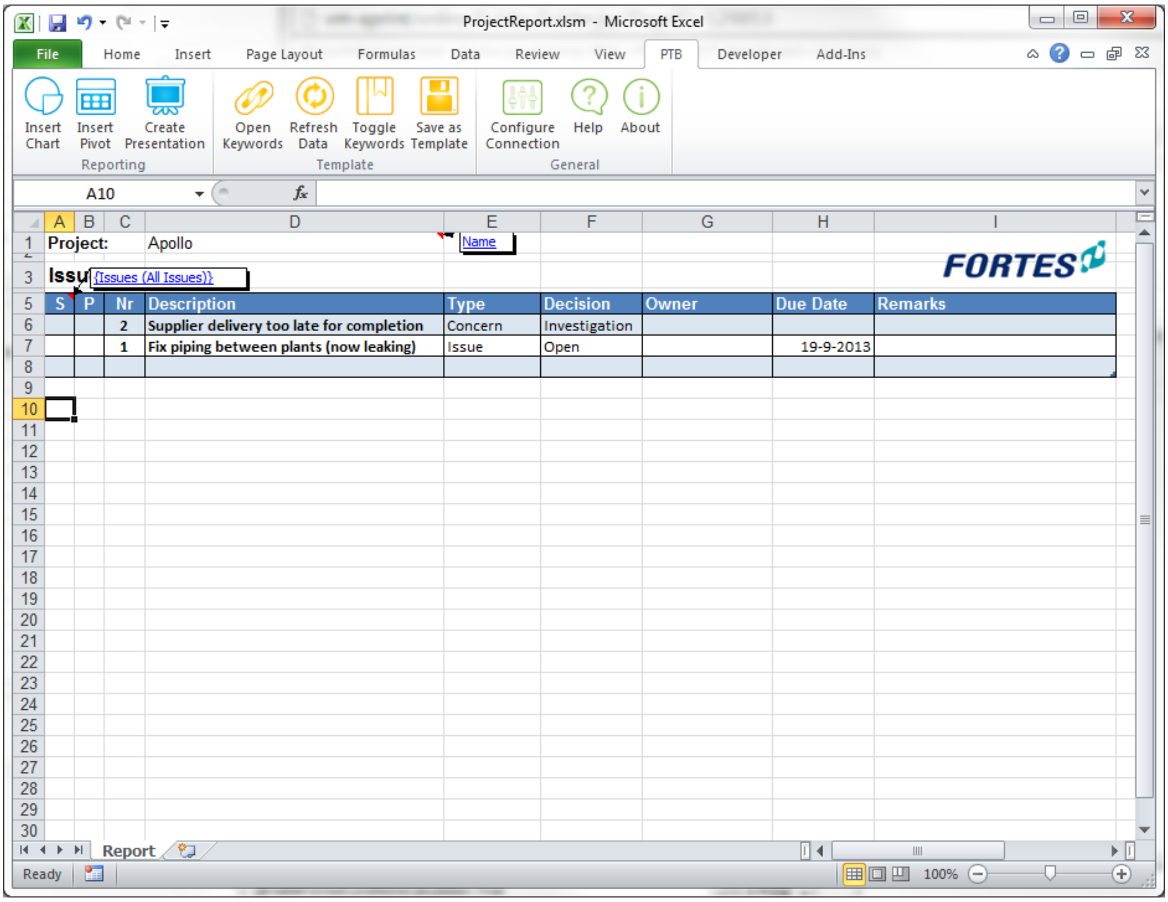
Automated reports on the project dashboard

> ***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.

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.



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 104.

8.3.2.2 Creating an Excel Report Template

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

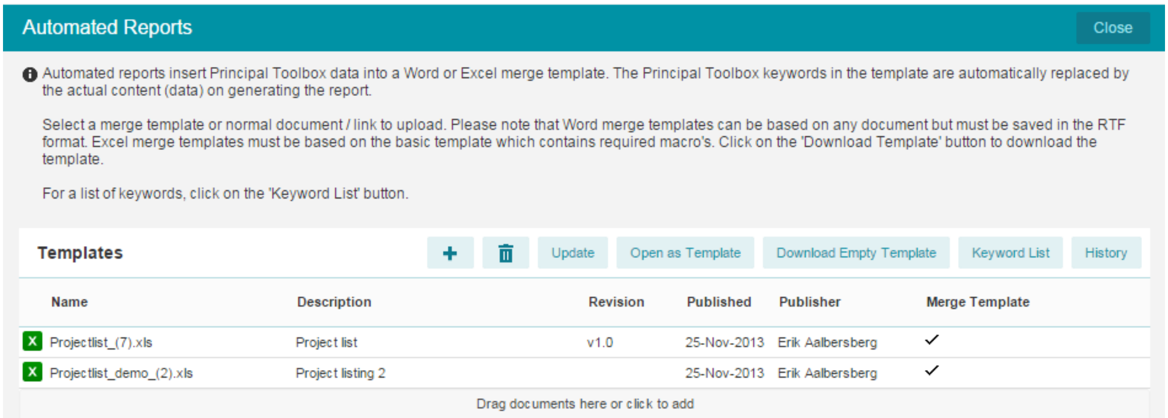
1. Download a basic Excel report template 181
2. Open the template and insert keywords 183
3. Extending the report data 186
4. Finish the template and make the report template available within the 187 Principal Toolbox

8.3.2.2.1 Open the basic Excel Report Template

> ***Note**: You need to be manager of the folder 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 folder report needs to be created, navigate to a folder 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 reports page.

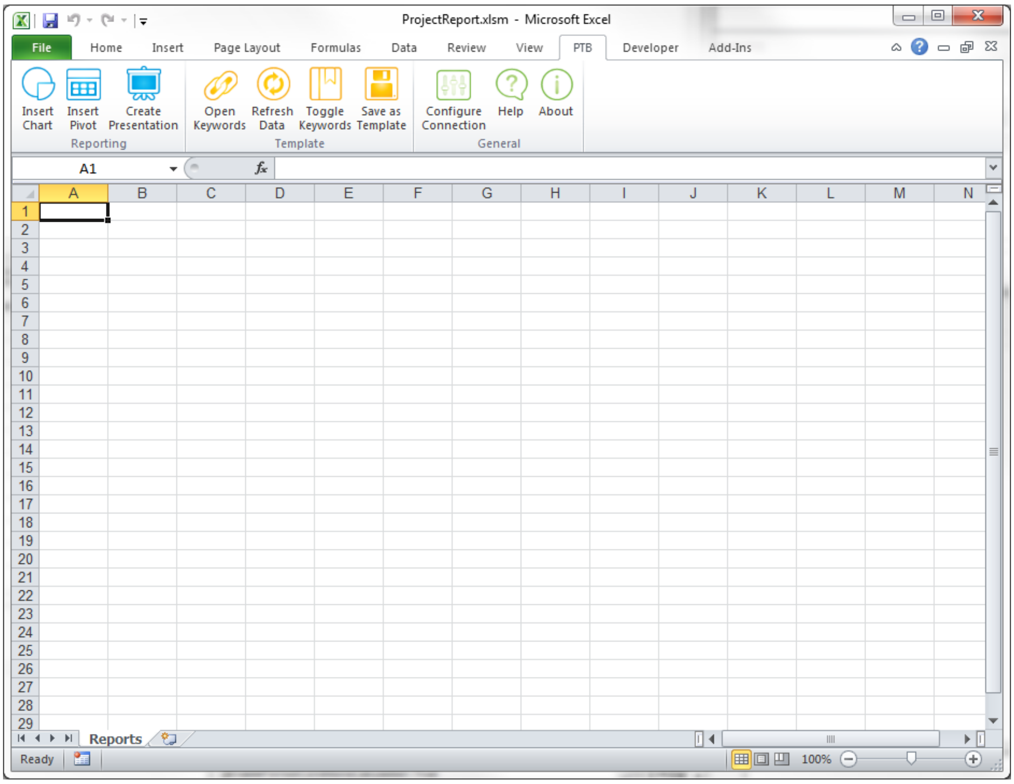
On this page, click the **'Download Basic Excel Template'** button to download an empty template that can be used as a start for creating the report template. Instead of starting a new template, an existing template can be used to modify, if one is available. In this case, click the 'Open template' button 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 here and add it manually to the desired location.*

When the Excel template is downloaded, following message is prompted by the browser.

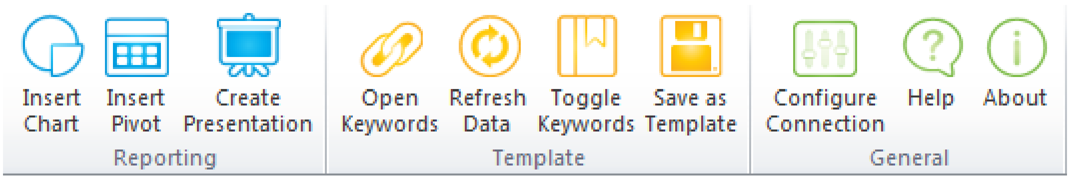
In this dialog, click **'Save'** and select an appropriate location for the template. Then click **'Open'** to start configuring the template in Excel. Saving the template first ensures that the Excel file is opened correctly. If opened directly, the required support macro's included in the Excel file 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).



Empty Excel file

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



Excel ribbon

The ribbon provides three sections:

- Reporting, provides options available to templates as well as generated reports like pivoting, charting and PowerPoint presentation. generation.

- Template, provides functions applicable to building a template: opening available keywords, refresh data, toggle visibility of keywords in the template and saving the template.

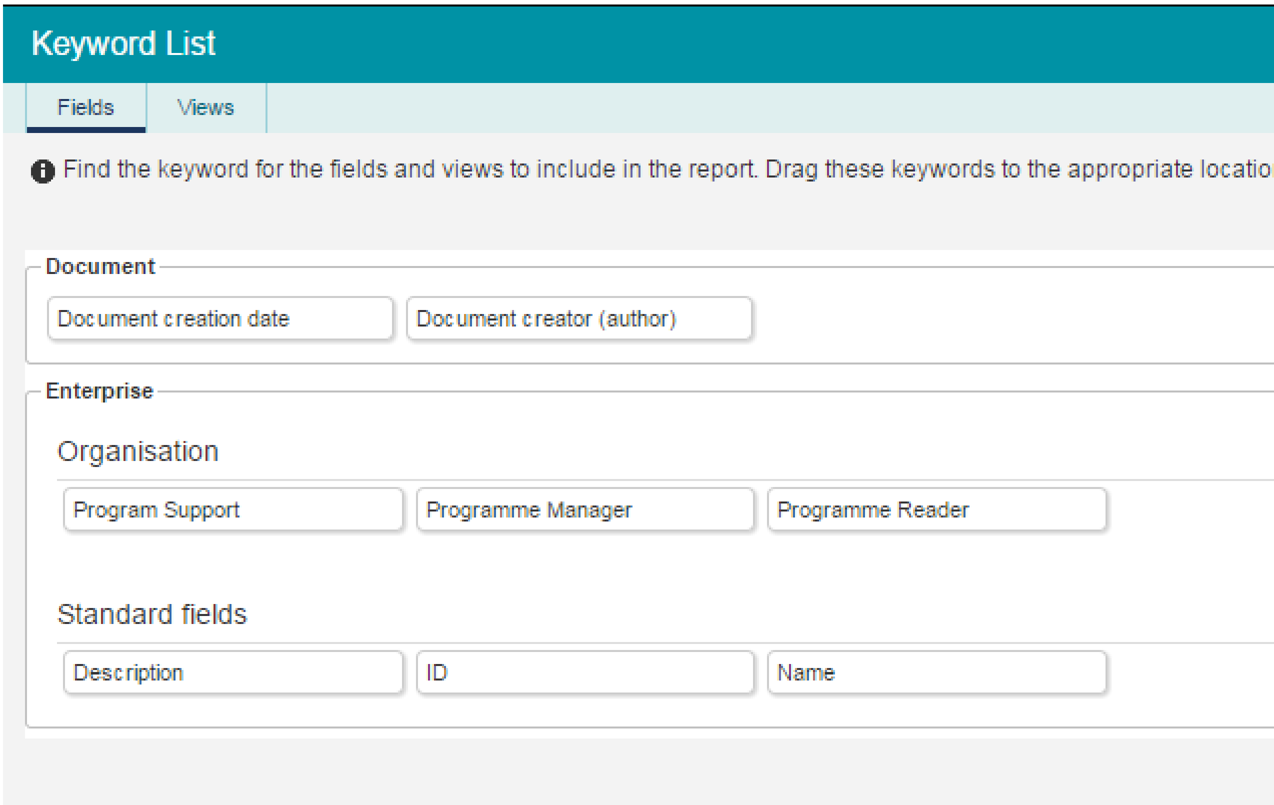
- General, configuration, help and an about dialog.

8.3.2.2.2 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 / folder.

> ***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.*

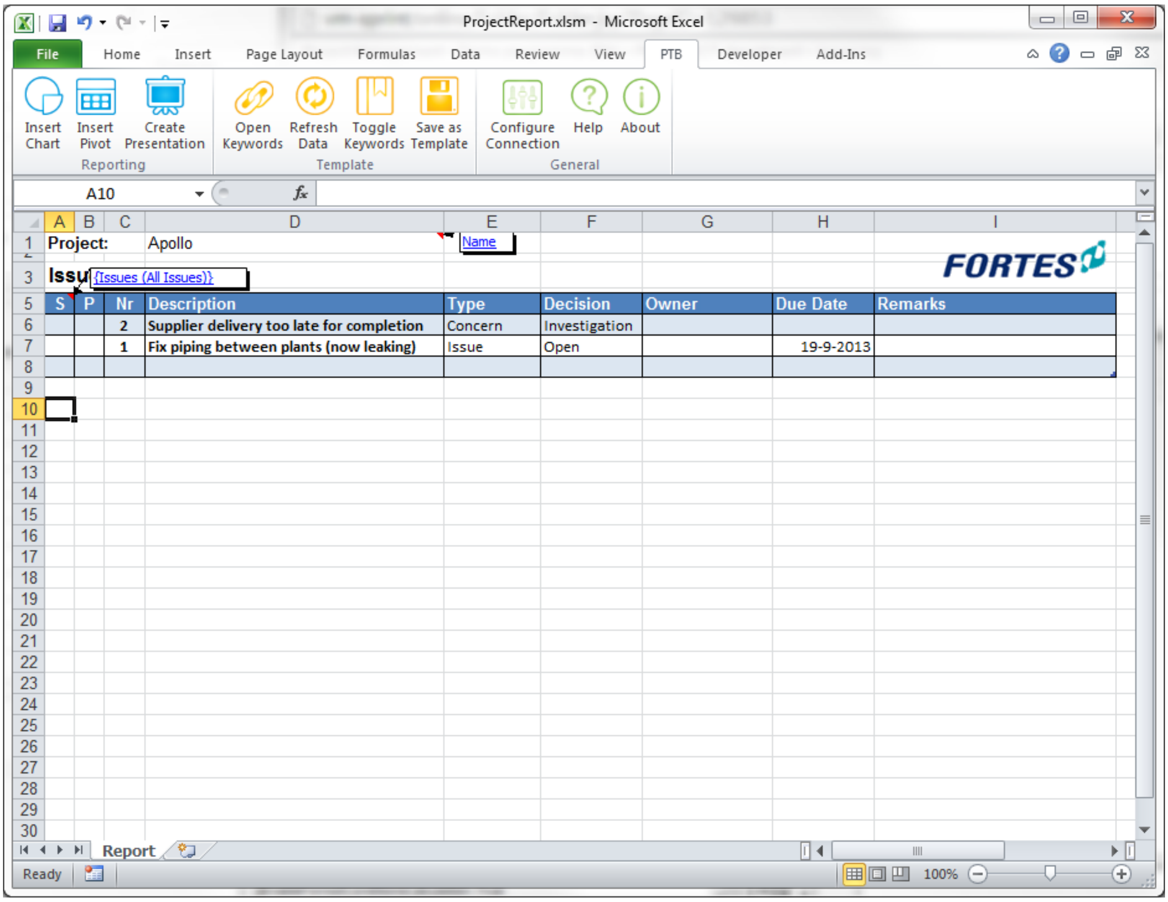


Keyword list

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**.

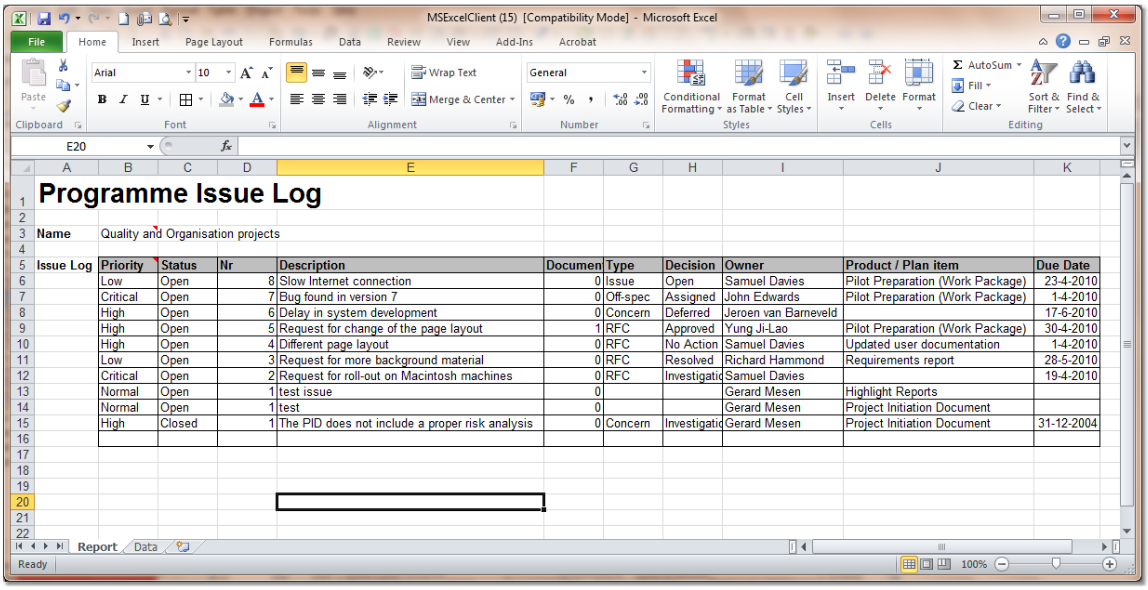
For example, when clicking the **'name'** keyword, the keyword can be inserted in the Excel file on location B2. Note that when inserting the keyword, the keyword is replaced with the actual data immediately. During this process, a dialog appears showing the progress of the operation.

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.



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.



Formatting the table

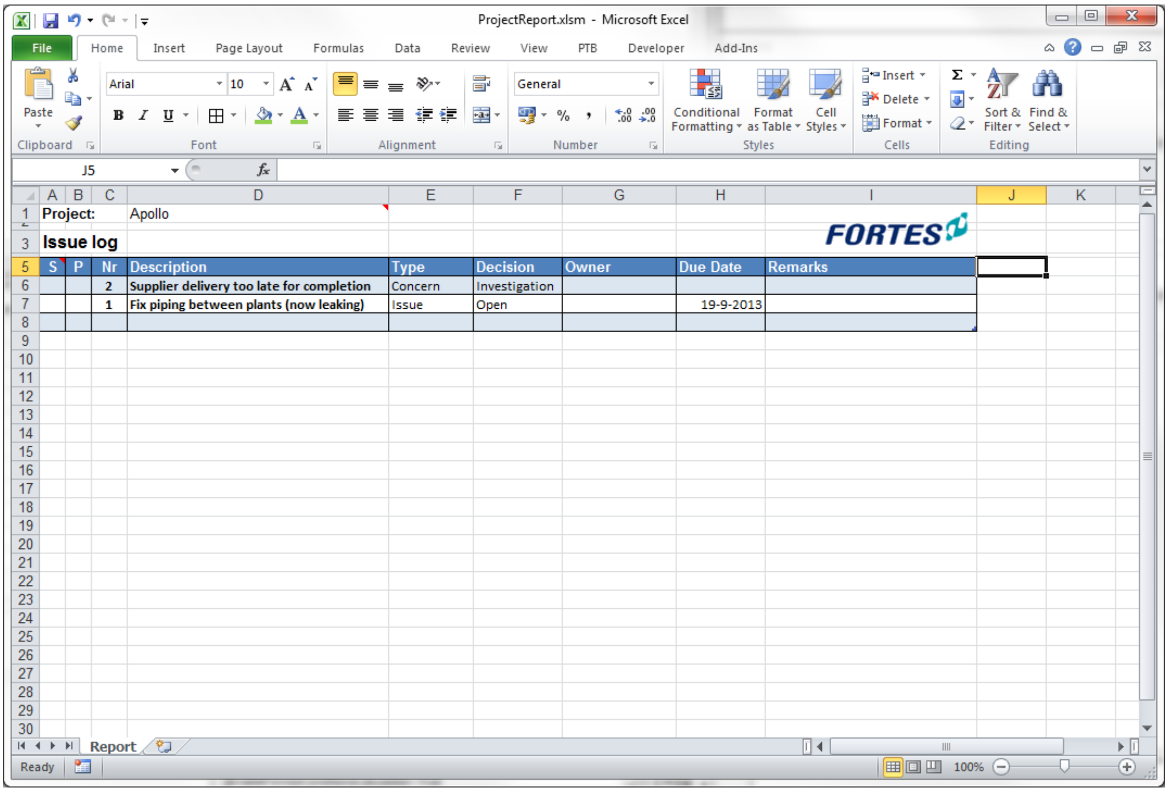
In the example above, the table has been adjusted and additional information inserted (labels, report title etc.). If necessary, the data can be refreshed by clicking the [Refresh PT Data] button on the template toolbar.

8.3.2.2.3 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.



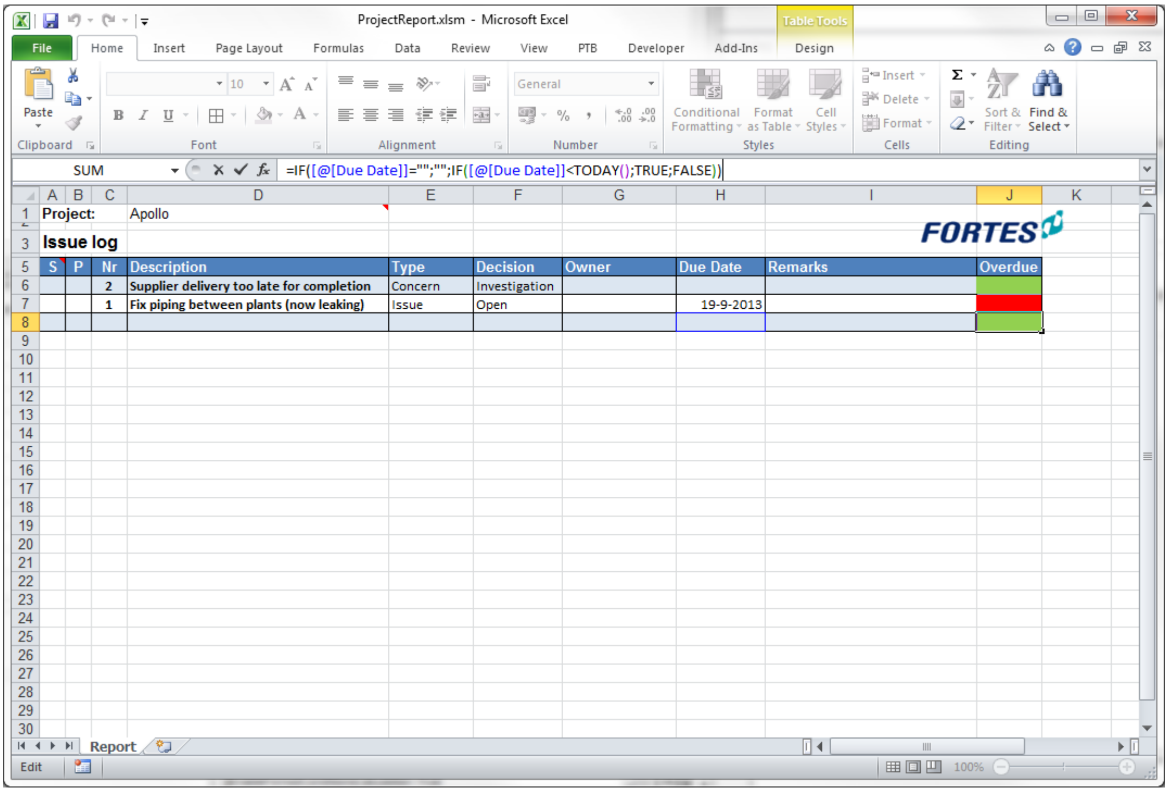
Extending the report data

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.



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).

8.3.2.2.4 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 folder, navigate to that specific folder dashboard to add the template.

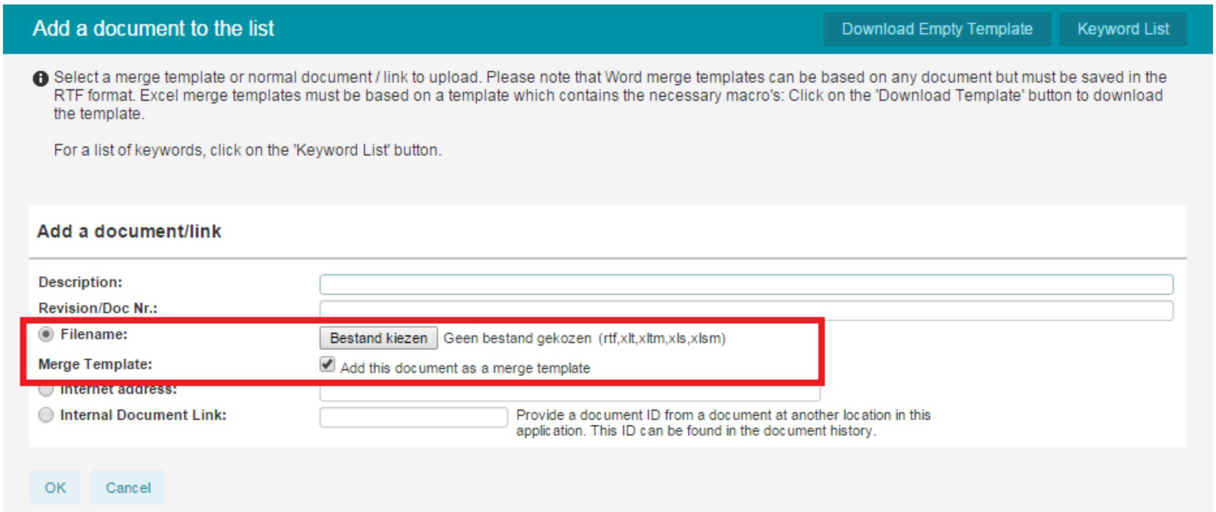
> ***Tip**: If you add the template in a model (either a project model or an MSP folder model), the report becomes available automatically on the projects / MSP folders that are created based on the model.*

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 181.

To upload the merge template in the Principal Toolbox, click  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!



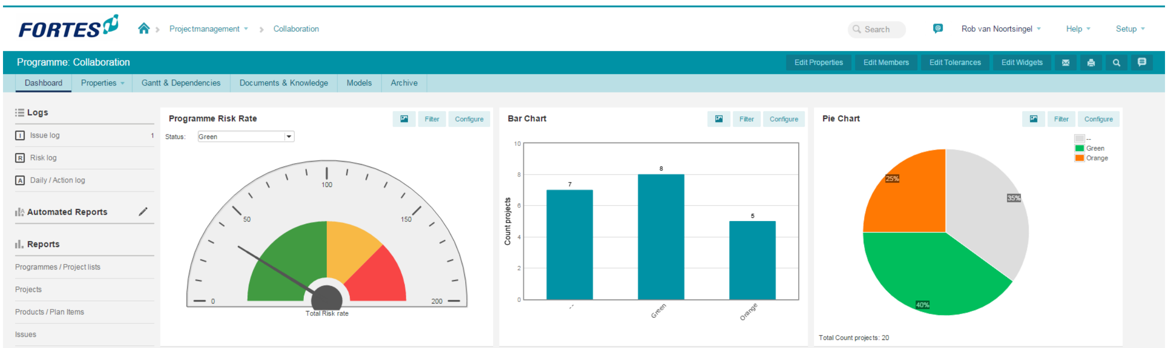
Adding a Excel Report Template

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 / folder etc. See using the Excel report 180.

8.4 Widgets

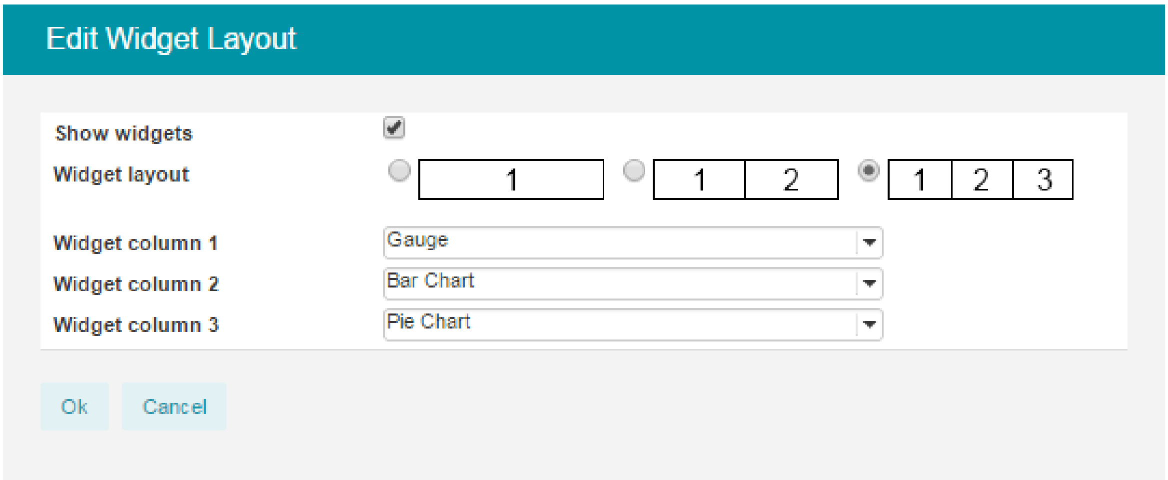
Widgets can present data directly, without having to run a report or opening a view. Widgets are easy to configure and refresh the data automatically. Widgets can be used for reports, but can also support specific processes and can be developed specifically for customers.



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 '✓' to display the widgets.
3. Select the number of widgets that should be displayed.
4. Select the type and confirm with **Ok**.



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. 

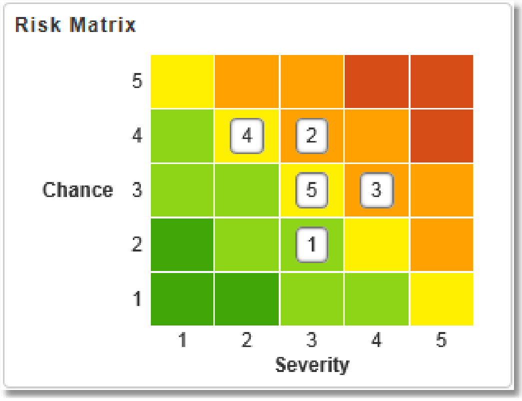
Allows to filter the set of objects that the filter includes in its representation. 

Allows to create an image of the current displayed widget. The image can be used to include in your report. 

Widgets are available at different levels. In the next sections all widgets will de discussed, including their configuration and available location(s).

8.4.1 Risk matrix

The risk matrix is available at the project level only. It visualises the risks in respect to their chance and severity.
Risk matrices can be shown on project reports tabs as well as on the project's risk log.
This matrix sets the risk numbers in the cells according to their values for impact (severity) and probability (chance).



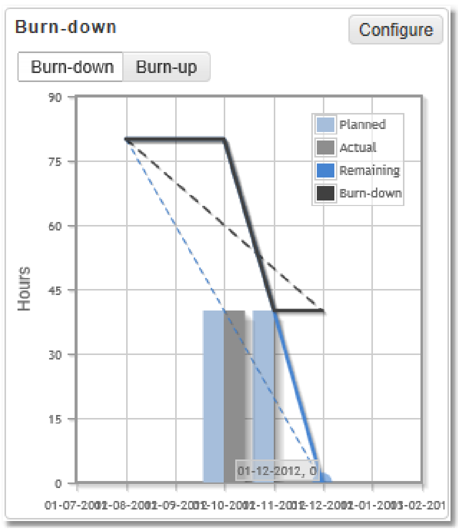
A risk matrix

Configuring the risk matrix:

The risk matrix automatically configures itself based on the risks in the risk log.

8.4.2 Burn-down chart

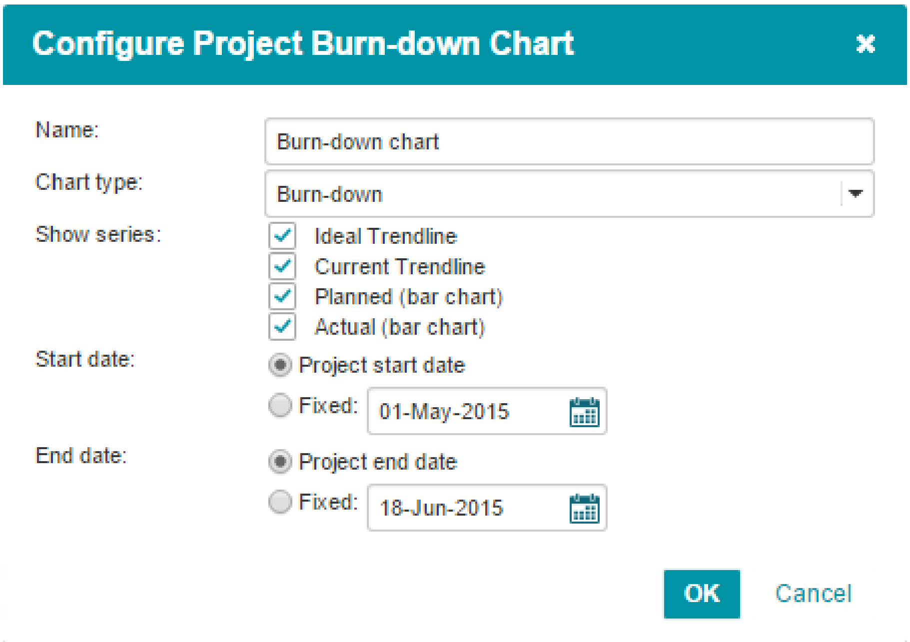
The burn-down chart is available at the project level only. It visualises planned versus actual hours within a configurable period.
Burn-down charts provide a burn-rate (burn-up or burn-down) as planned and actual to monitor project progress.



Burn-down chart

Configuring the burn-down chart:

1. Click Configure, a pop-up appears.



Configuration of the burn-down chart.

2. Enter the name of the chart and choose the chart type; either burn-down or burn-up.

3. Set the series to be shown; Ideal Trendline, Current Trendline, Planned (bar chart) and/or Actual (bar chart).

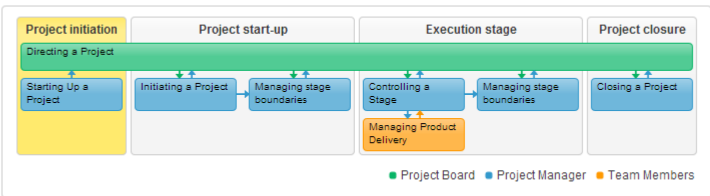
4. Set the start date to either the project start date or a fixed date.

5. Set the end date to either the project end date or a fixed date.

6. Click 'OK' to save the configuration.

8.4.3 PRINCE2 process diagram

PRINCE2 process diagrams are available at the Generic projects only.
It visualises the PRINCE2 project process with respect to the project plan and progress.



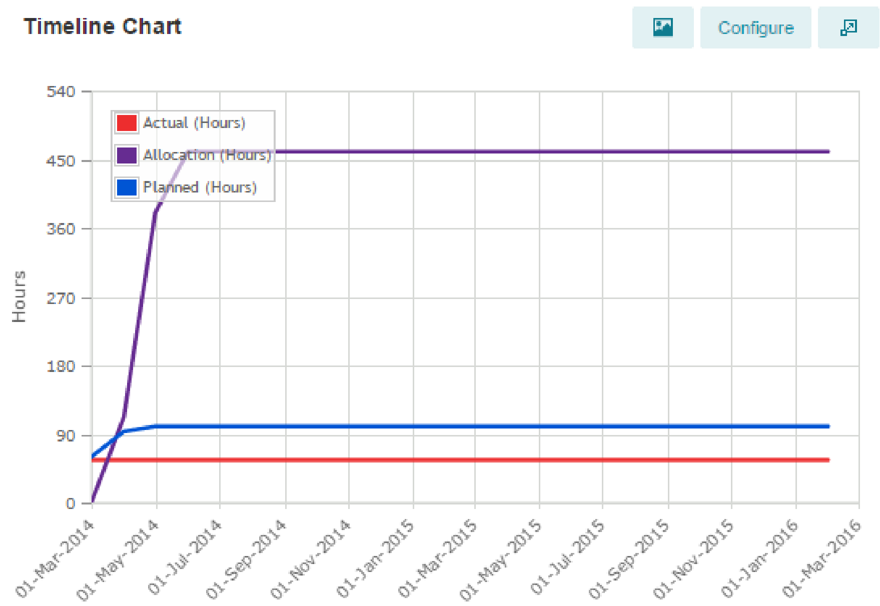
PRINCE2 process diagram

Configuring the PRINCE2 process diagram:

This widget configures itself automatically, highlighting the current stage of the project.

8.4.4 Timeline chart

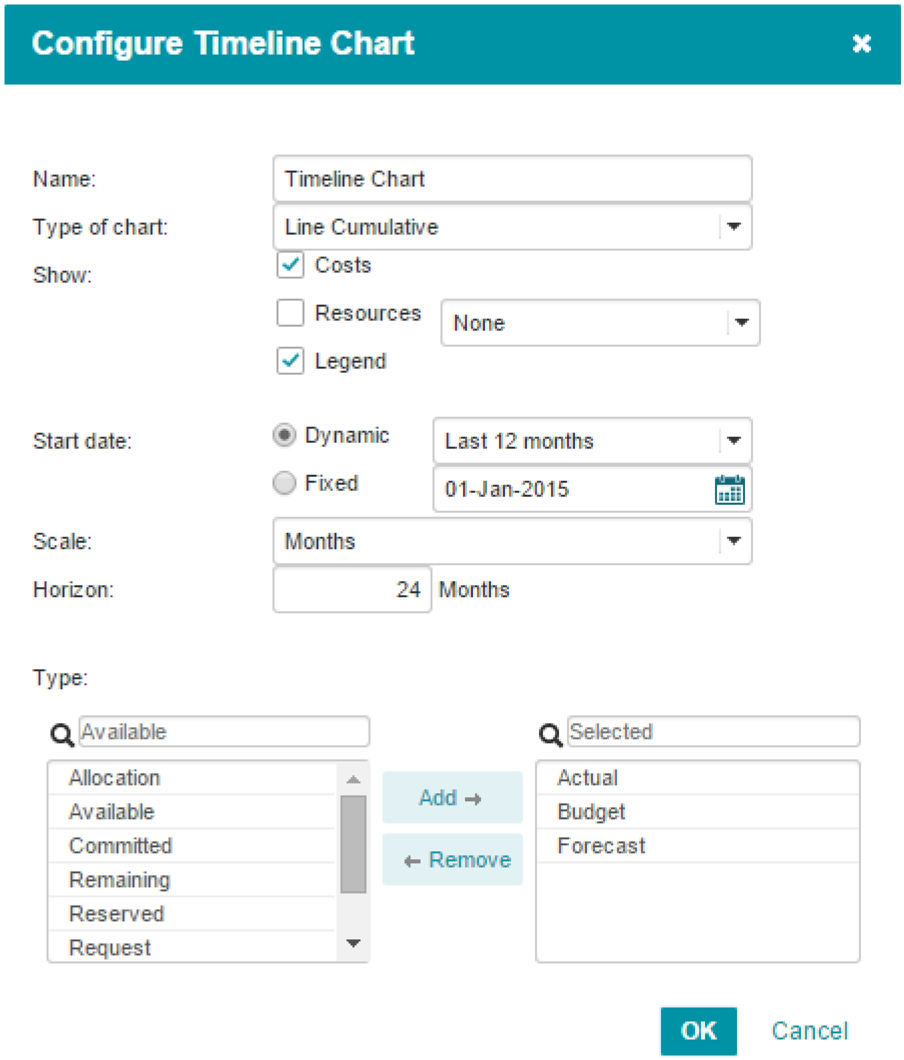
Timeline charts are available at projects, programmes, folders and portfolios.
They visualise timeline information on costs and/or hours for selected types (budget, actual, etc.).



Timeline chart

Configuring Timeline charts:

1. Click Configure, a pop-up appears.



Configuration of the timeline chart.

2. Enter the name of the chart and choose the chart type; either Bar, Bar Cumulative, Line or Line Cumulative.

3. Set Costs, Resources and Legend to be shown (if desired).

4. Set the start date to either a dynamic range of a fixed date.

5. Set the scale to either Weeks, Months, Quarters or Years.

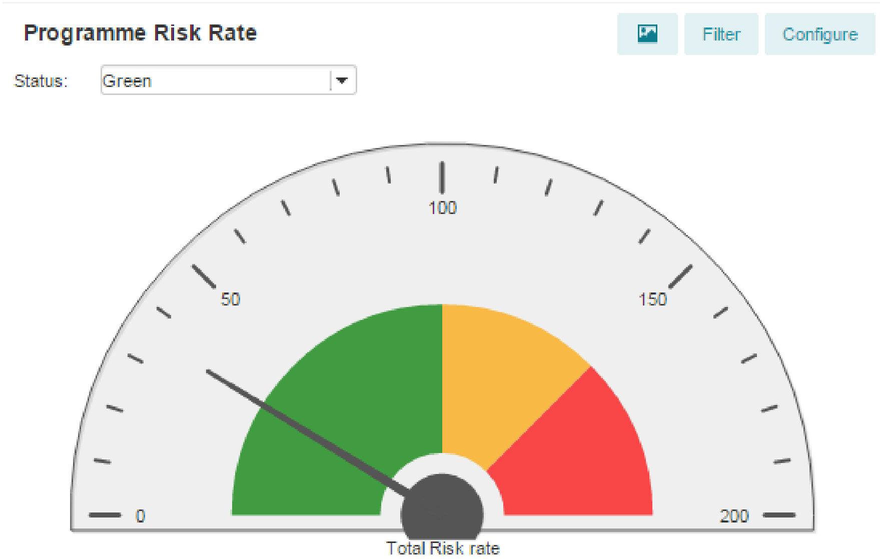
6. Set the horizon.

7. Select the types to be selected.

8. Click 'OK' to save the configuration.

8.4.5 Gauge meter

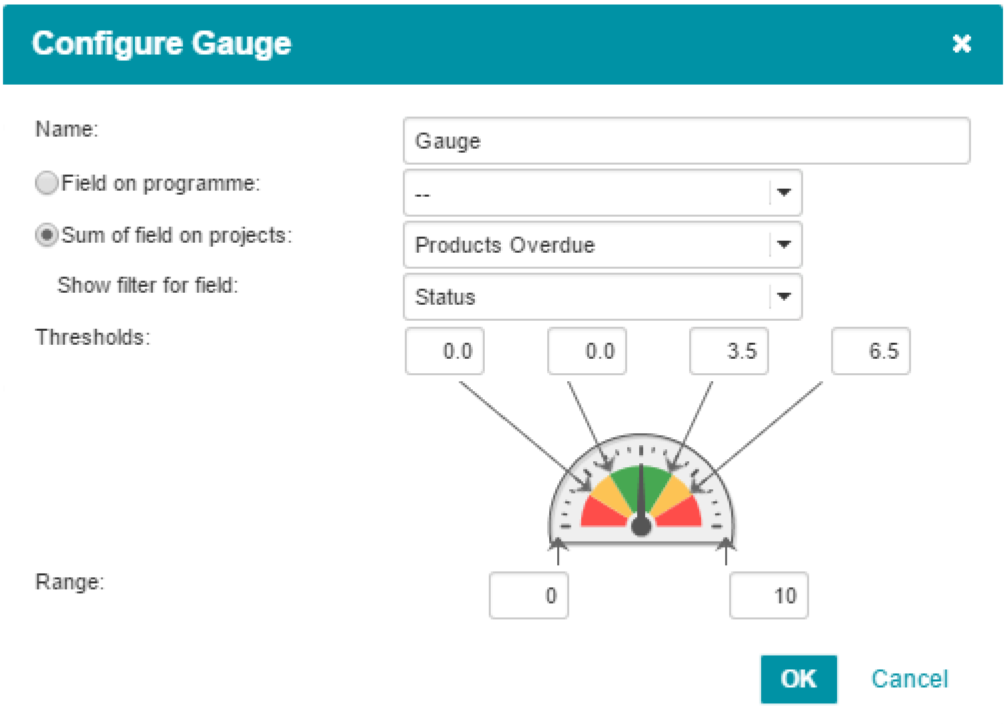
The gauge meter is available at programmes, folders and portfolios.
It visualises a single value against a conditional meter indication (green, amber, red).



Gauge meter

Configuring the gauge meter:

1. Click Configure, a pop-up appears.



Configuration of the gauge meter.

2. Enter the name of the chart.

3. Select whether the meter is set for a field on the programme (cost, hours, etc.) or a sum of the field on project (projects overdue, total costs, etc.)

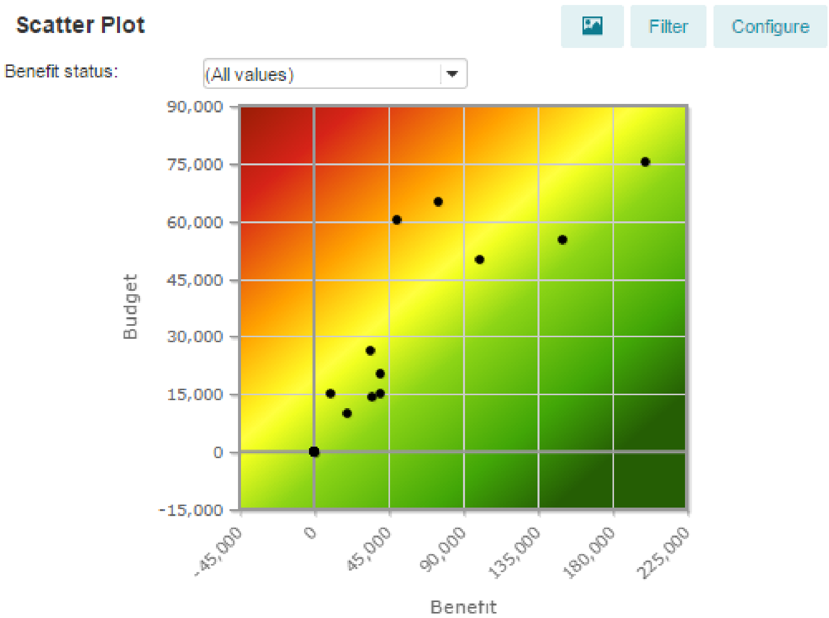
4. Set the Thresholds for the meter.

5. Set the Range for the gauge meter.

6. Click 'OK' to save the configuration.

8.4.6 Scatter plot

The scatter plot is available at programmes, folders and portfolios.
It visualises projects weighted to different axes. An indication of good/bad can be shown using different colour gradients.

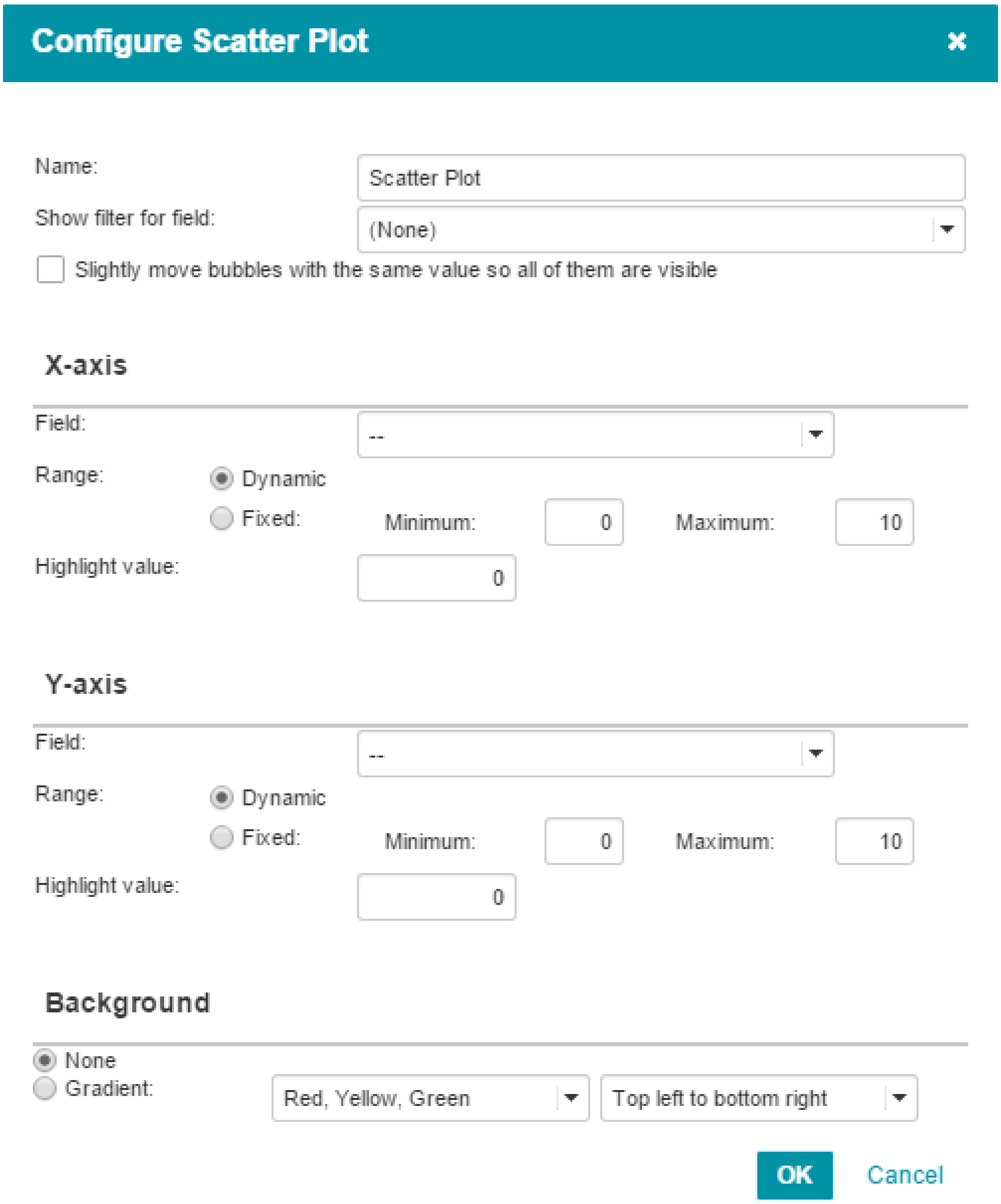


Scatter plot

Configuring the scatter plot:

1. Click 

, a pop-up appears.



Configuration of the scatter plot

2. Enter the name of the chart.

3. Optionally; set a filter for a field

4. Choose whether or not bubbles with the same value should be slightly moved so all of them are visible.

   Note: When the scatter plot does not show the appropriate values this could be due to internal values of the Principal Toolbox.

5. Choose a field for the X-axis and set the range (either dynamic or fixed), also set a highlight value.

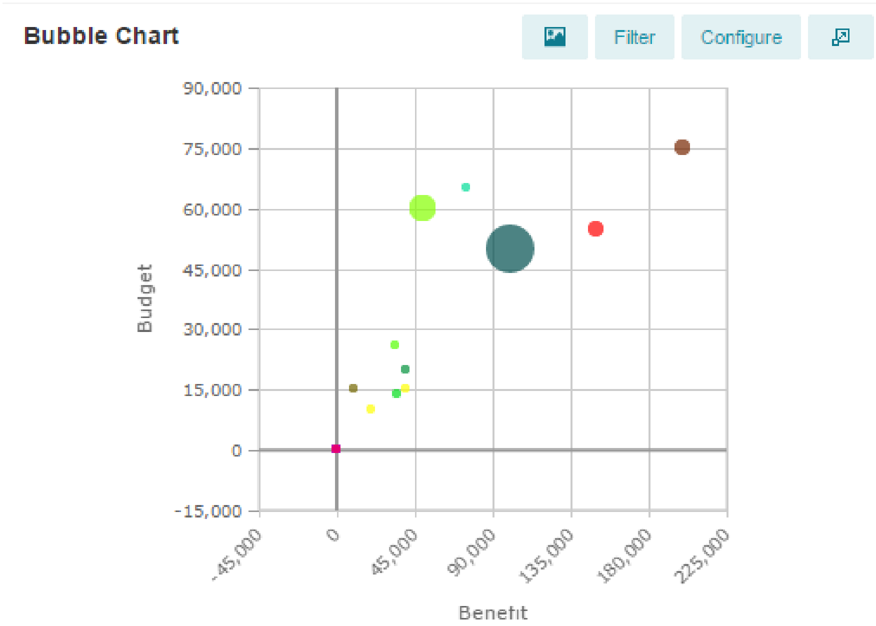
6. Choose a field for the Y-axis and set the range (either dynamic or fixed), also set a highlight value.

7. Optionally: set the background gradient to indicate good/bad scores.

8. Click 'OK' to save the configuration.

8.4.7 Bubble chart

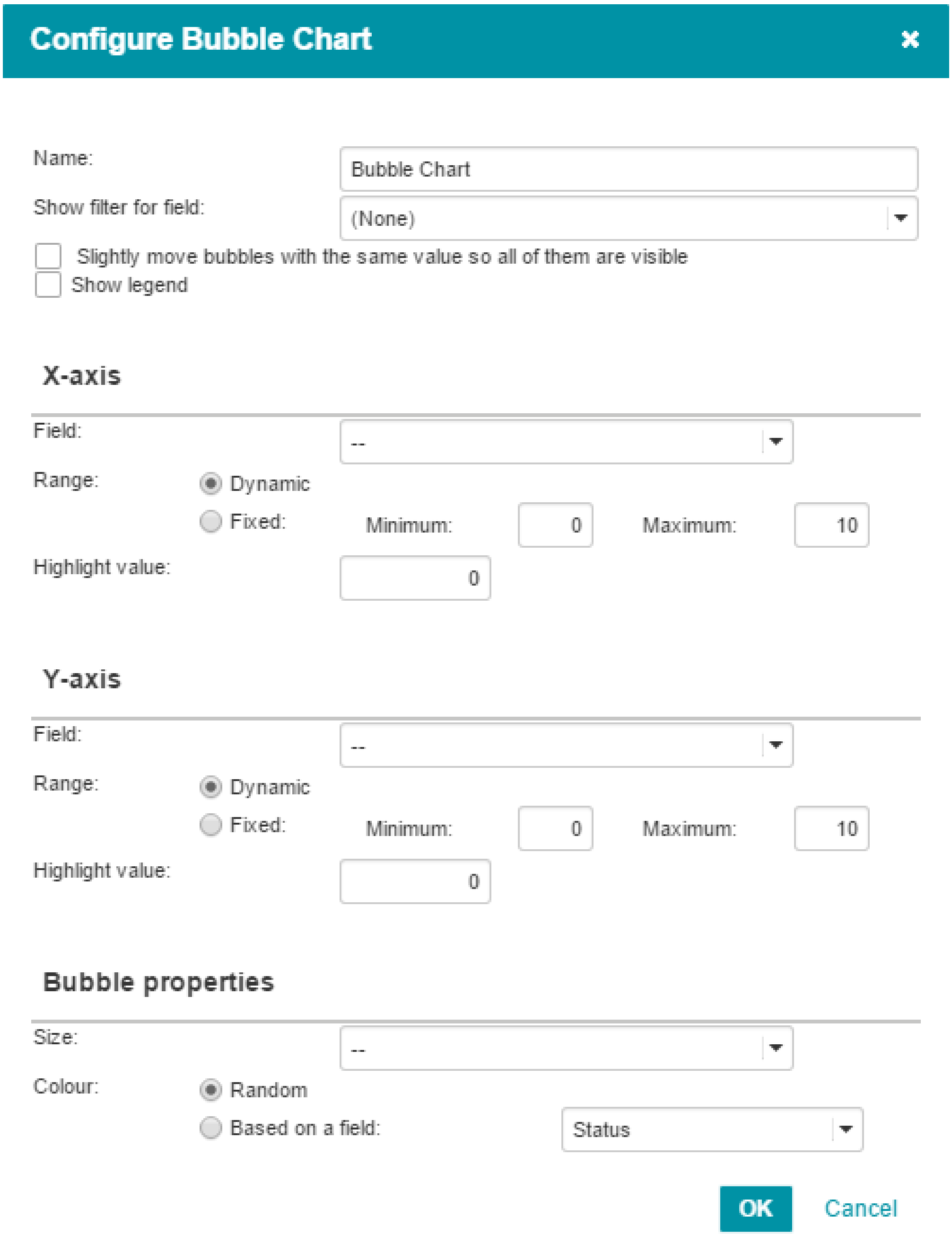
The bubble chart is available at programmes, folders and portfolios.
It visualises projects weighted to different axes. Additionally, the size can be used for indication of impact.



Bubble chart

Configuring the bubble chart:

1. Click Configure, a pop-up appears.



Configuration of the bubble chart

2. Enter the name of the chart.

3. Optionally; set a filter for a field

4. Choose whether or not bubbles with the same value should be slightly moved so all of them are visible.

5. Choose whether the legend should be visible.

Note: When the scatter plot does not show the appropriate values this could be due to internal values of the Principal Toolbox.

6. Choose a field for the X-axis and set the range (either dynamic or fixed), also set a highlight value.

7. Choose a field for the Y-axis and set the range (either dynamic or fixed), also set a highlight value.

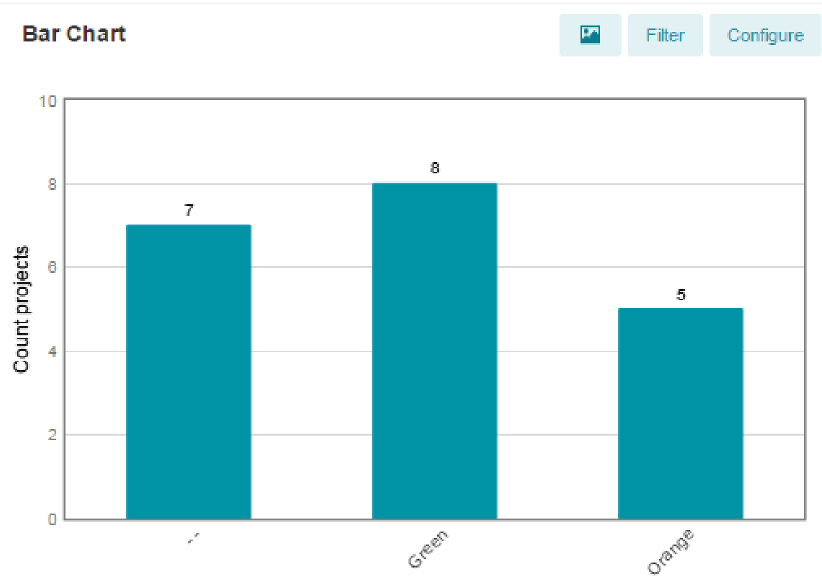
8. Optionally: set the bubble properties:

   Size: Select the field that determines the size of the bubble.
   Colour: Base the colour on a field or set the colour to random.

9. Click 'OK' to save the configuration.

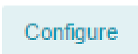
8.4.8 Bar chart

The bar chart is available at programmes, folders and portfolios.
It visualises project values grouped by different options in bar layout.

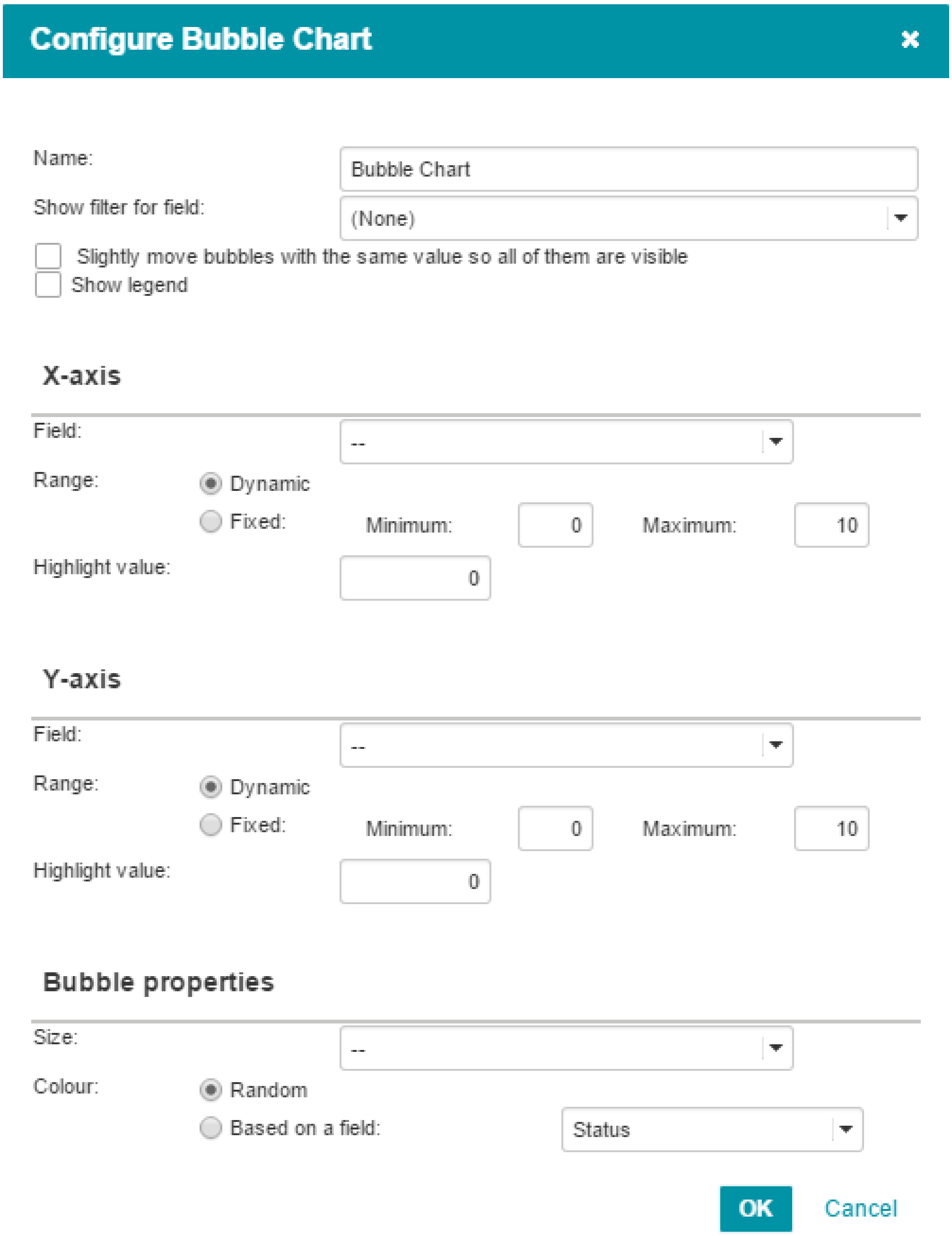


Bar chart

Configuring bar charts:

1. Click 

, a pop-up appears.



Configuration of the bar chart

2. Enter the name of the chart.

3. Optionally; set a filter for a field

4. Choose whether or not bubbles with the same value should be slightly moved so all of them are visible.

5. Choose whether the legend should be visible.

   Note: When the scatter plot does not show the appropriate values this could be due to internal values of the Principal Toolbox.

6. Choose a field for the X-axis and set the range (either dynamic or fixed), also set a highlight value.

7. Choose a field for the Y-axis and set the range (either dynamic or fixed), also set a highlight value.

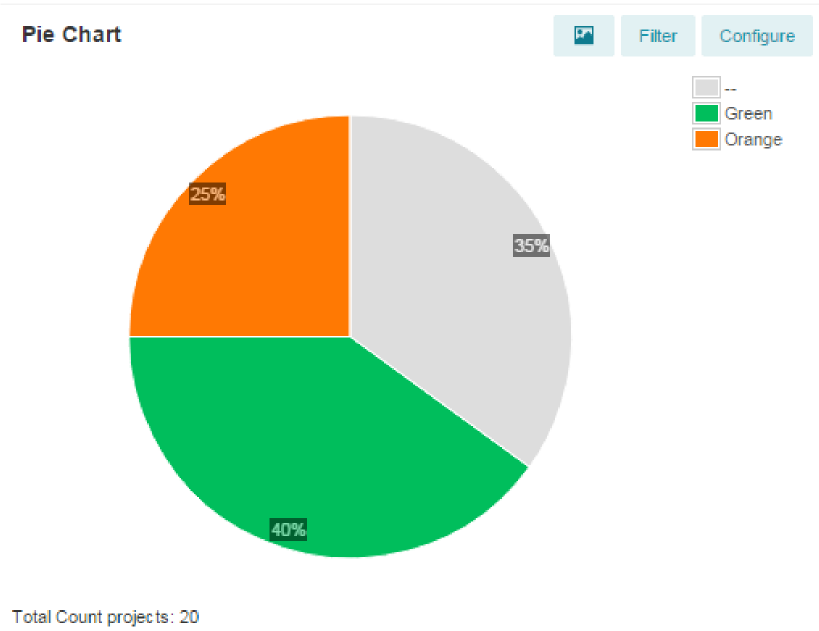
8. Optionally: set the bubble properties:

   Size: Select the field that determines the size of the bubble.
   Colour: Base the colour on a field or set the colour to random.

9. Click 'OK' to save the configuration.

8.4.9 Pie chart

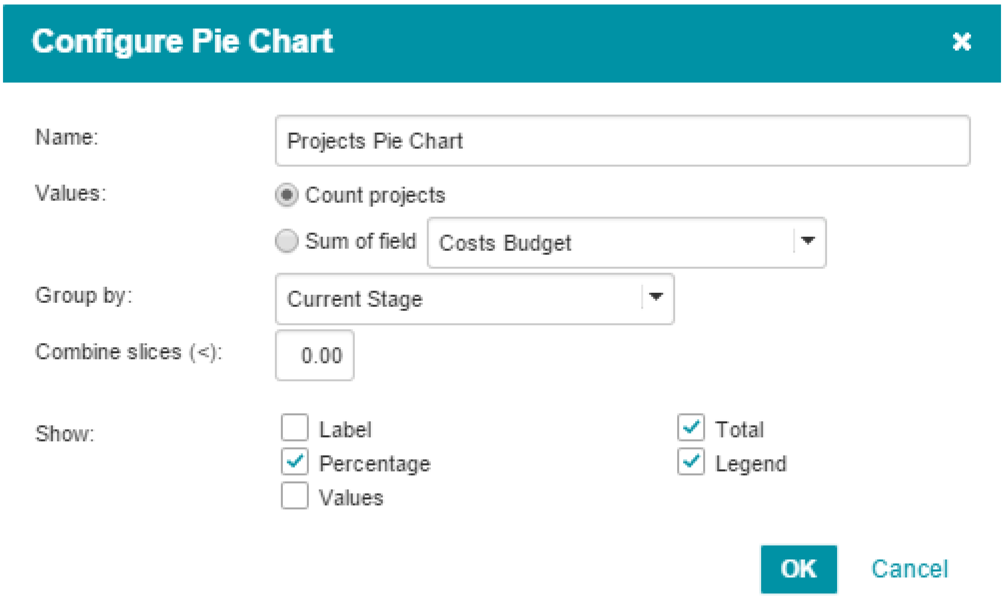
The pie chart is available at programmes, folders and portfolios.
It visualises project values grouped by different options in pie layout.



Pie chart

Configuring pie charts:

1. Click Configure, a pop-up appears.



Configuration of the pie chart

2. Enter the name of the chart.

3. Set the values; either count project or the sum of a field (Cost Budget, Benefit, etc.).

4. Set the field by which the pie chart should be grouped (Current stage, Benefit status, etc.).

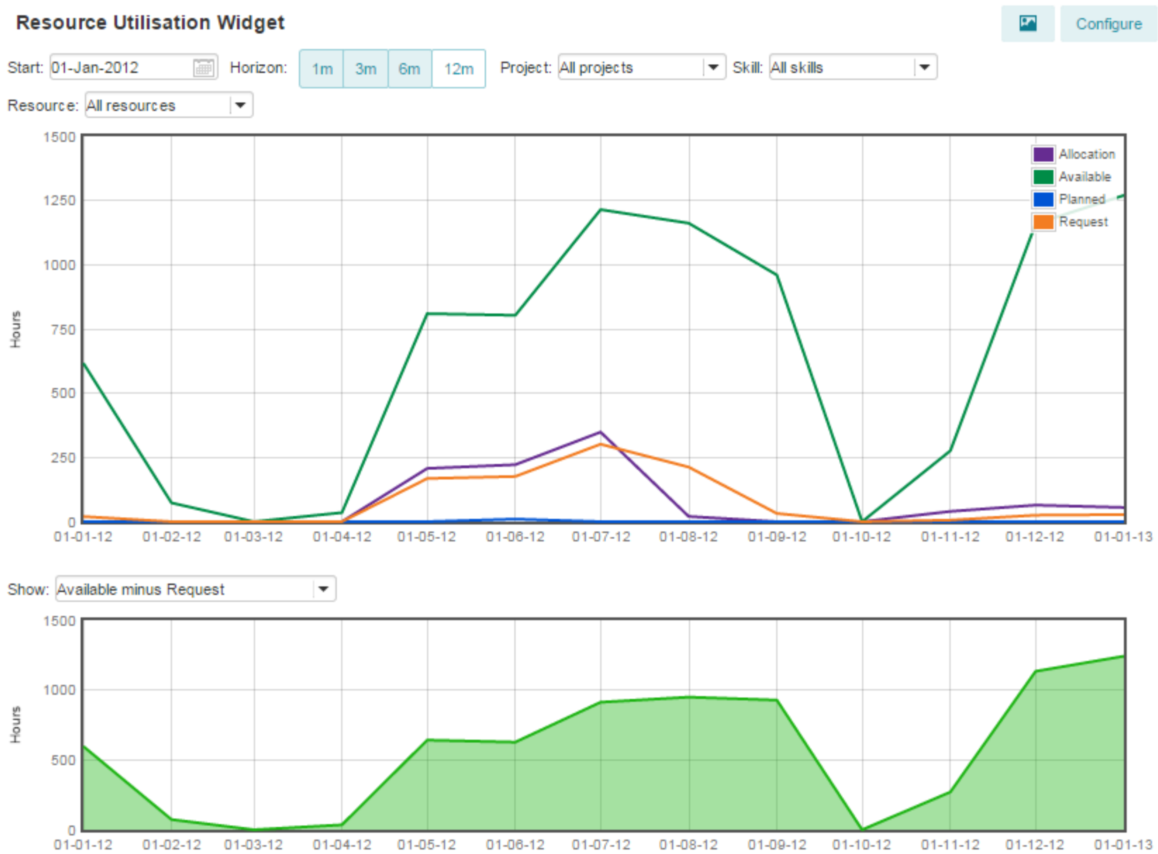
5. Choose whether/when slices should be combined.

6. Select what should be shown in the pie chart (Label, Percentage, Values, Total and Legend).

7. Click 'OK' to save the configuration.

8.4.10 Resource utilisation

The resource utilisation widget is available within Resource Management (within an organisational unit).
It visualises information of a resource (availability vs. allocated) and whether the request and allocations are leveled etc.

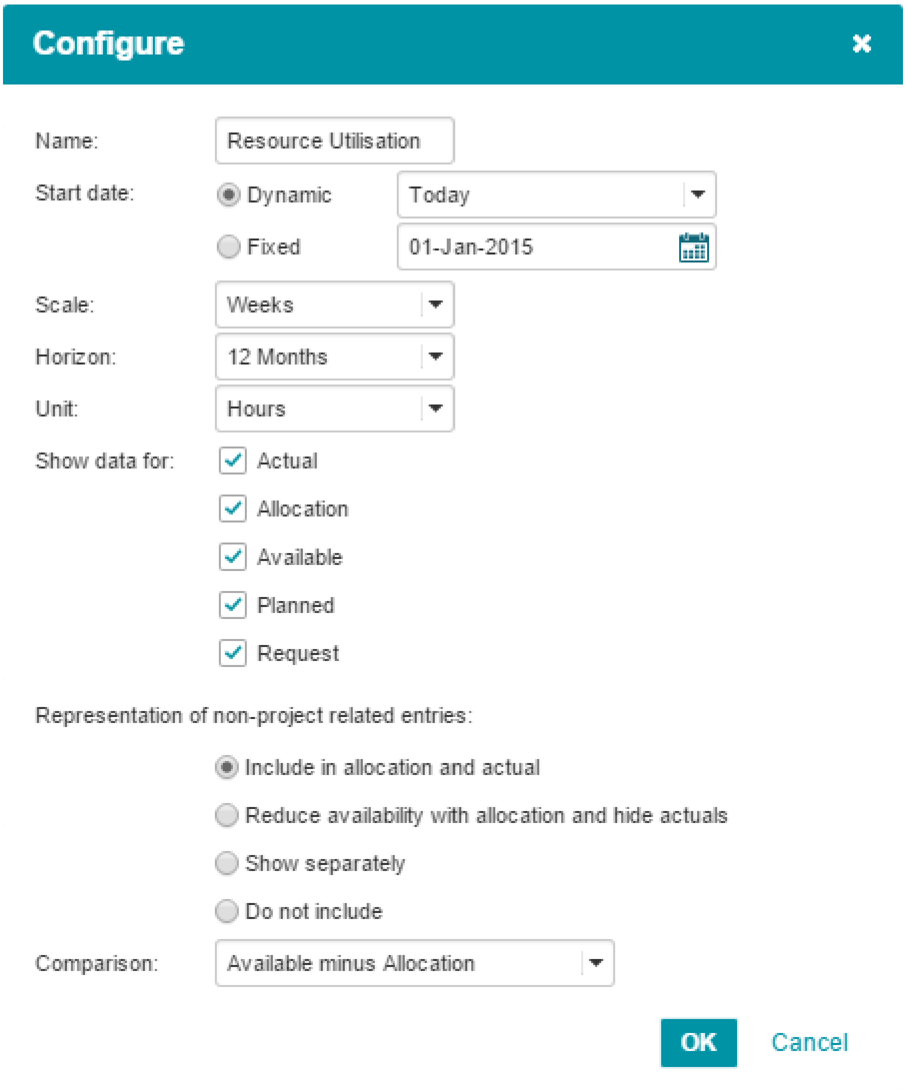


Resource utilisation widget

Configuring the resource utilisation widget:

1. Click 

, a pop-up appears.



Configuration of the resource utilisation widget

2. Enter the name of the chart.

3. Set the start date; either dynamic or fixed.

4. Set the scale either to Weeks or Months.

5. Set the horizon either to 1, 3, 6 or 12 Months.

6. Set the unit to be used (Hours, Man days or Man weeks).

7. Choose for which fields data should be shown; Actual, Allocation, Available, Planned and/or Request.

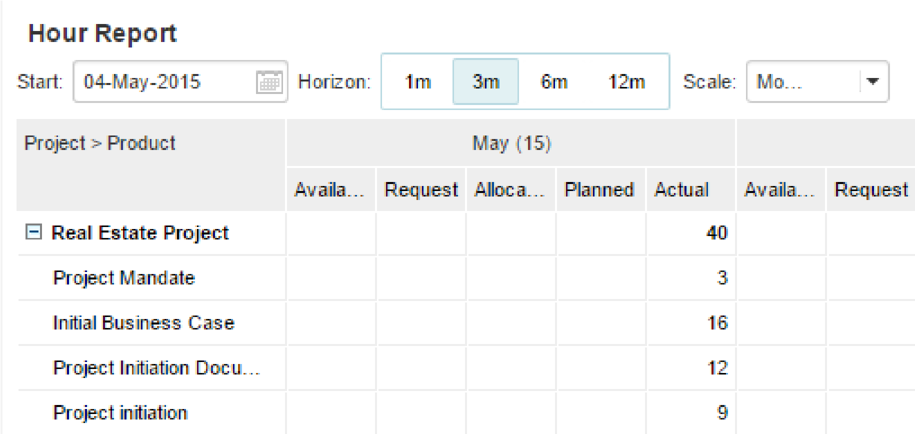
8. Choose how the non-project related entries will be represented.

9. Choose the comparison.

10. Click 'OK' to save the configuration.

8.4.11 Hour Report

The hour report is available at the home page and within time registration groups.
It visualises information of a resource (availability vs. allocated) and whether the request and allocations are leveled etc.

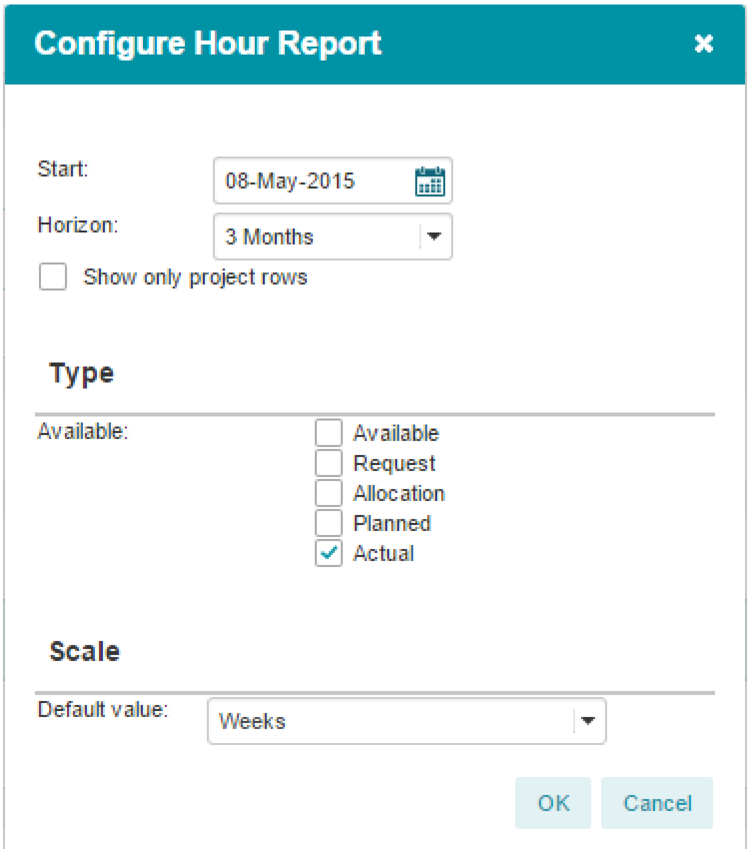


Hour report widget

Note: The hour report widget only reports on approved time sheets.

Configuring the personal hours widget:

1. Click Configure, a pop-up appears.

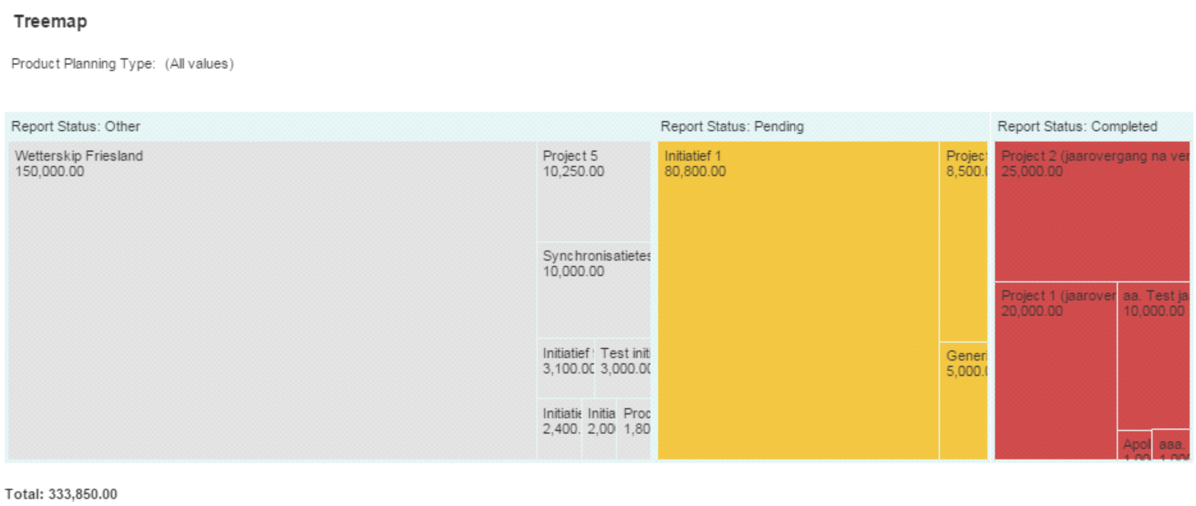


Configuration of the hour report.

2. Select the start date.
3. Set the horizon to 1, 3, 6 or 12 months.
4. Choose whether only project rows will be shown.
5. Select the type; Available, Request, Allocation, Planned and/or Actual.
6. Set the scale default value; Days, Weeks or Months.
7. Click 'OK' to save the configuration.

8.4.12 Treemap

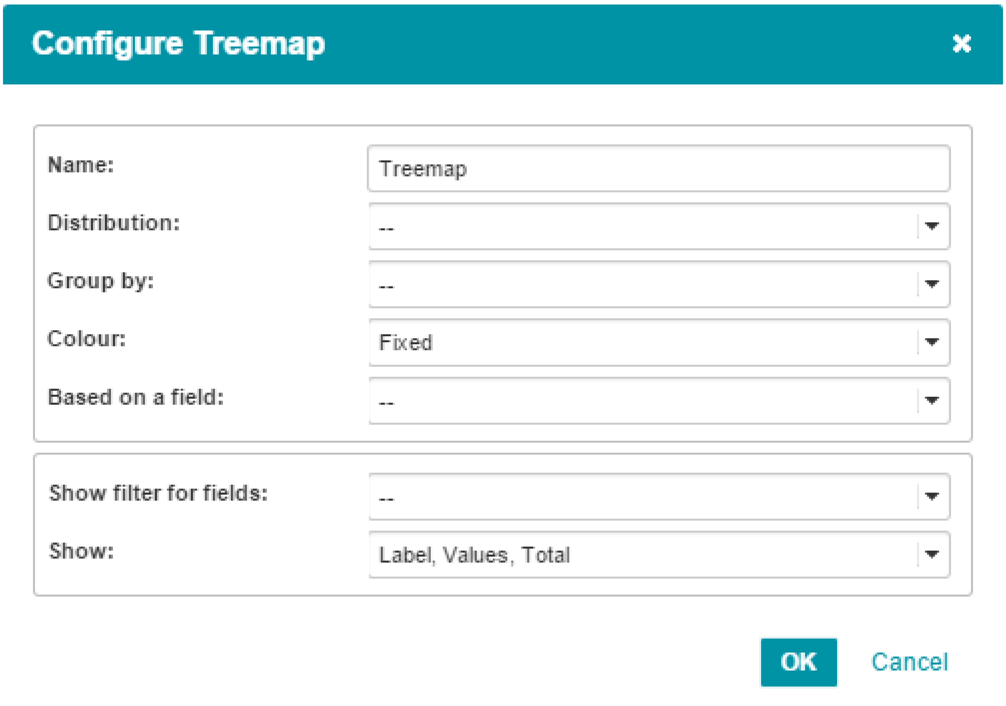
The Treemap widget is available at programmes, folders and portfolios.
It visualises project values grouped by different options in nested rectangles.



Treemap widget

Configuring the Treemap widget:

1. Click Configure , a pop-up appears.



Configuration of the Treemap widget

2. Set the name of the Treemap.

3. Select the field to distribute the Treemap by (Benefit, Costs, ID, etc.).

4. Select the field to group the Treemap by (Benefit status, Effort requirement, etc.).

5. Select the colours of the Treemap. Either fixed, random or based on a field.

6. When the colour is set to be based on a field, select this field (Status, Technology risk rate, etc.).

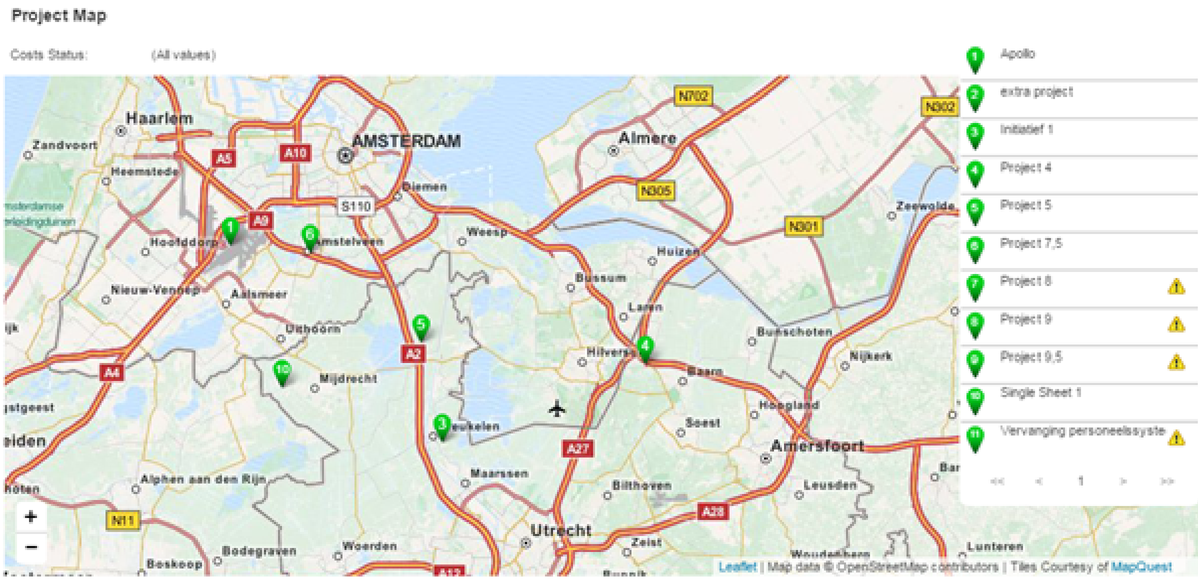
7. Optionally: Set a filter for a field.

8. Choose what should be shown in the Treemap (Label, Values, Total, etc.).

9. Click 'OK' to save the configuration

8.4.13 Project map (Geo)

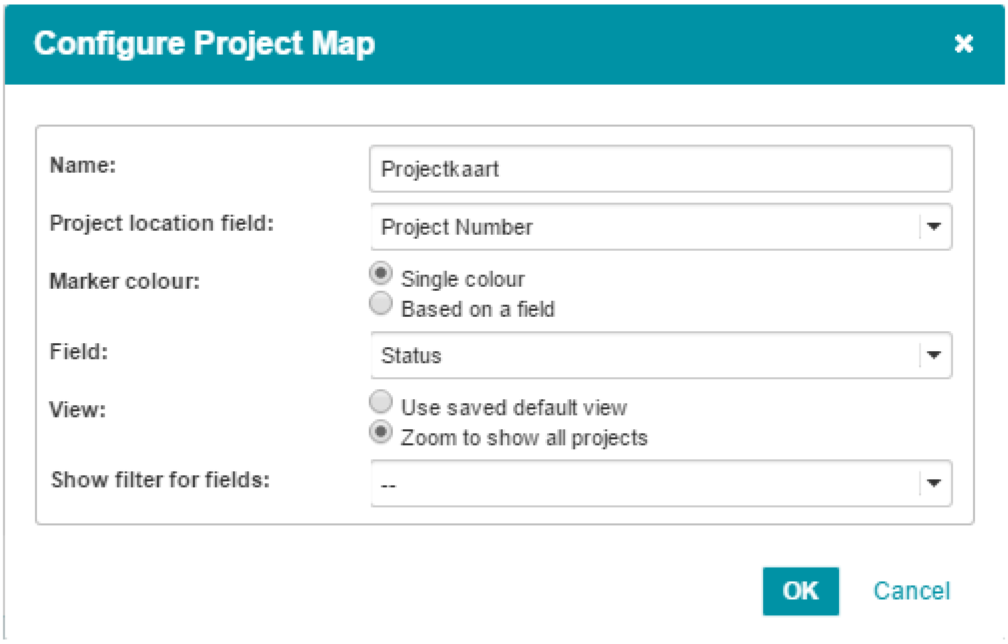
The Project map (Geo) widget is available at programmes and folders only.
It visualises projects on their GPS location. When they don;t have a GPS-location yet, they can also be dragged to one.



Project Map widget

Configuring the Project map (Geo) widget:

1. Click Configure, a pop-up appears.



Configuration of the project map

2. Set the name of the Project map.

3. Select project location field (portfolio name, project number, etc.).

4. Select the marker colour (single colour of based on a field).

5. If the colour is set to be based on a field, select the field (status, benefit status, etc.).

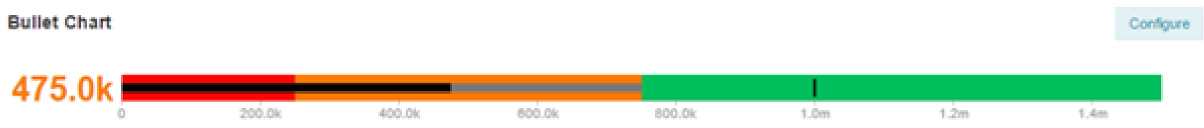
6. Select the view. Either use a saved default view or zoom to show all projects.

7. Optionally: Set a filter for the fields.

8. Click 'OK' to save the configuration

8.4.14 Bullet chart

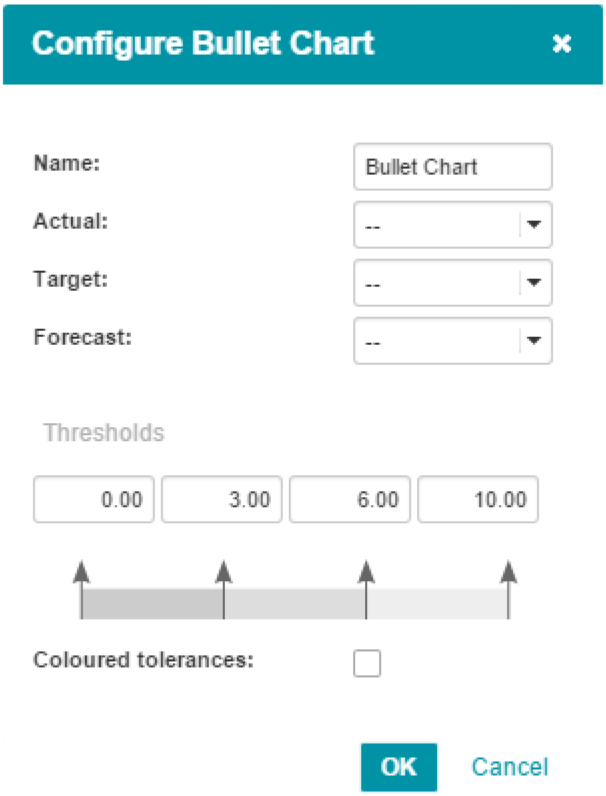
Bullet charts are available at programmes and folders only.
A bullet chart "provides a rich display of data in a small space." A variation on a bar chart, bullet charts compare a given quantitative measure against qualitative ranges and related markers.



Bullet chart widget

Configuring the bullet chart:

1. Click Configure, a pop-up appears.



Configuration of the bullet chart

2. Set the name of the bullet chart.

3. Select the actuals to be used (Cost, Cost Budget, etc.).

4. Select the Target to be used (Cost, Cost Budget, etc.).

5. Select the Forecast to be used (Cost, Cost Budget, etc.).

6. Set the thresholds for the bullet chart and choose whether the tolerances should be coloured or not.

7. Click 'OK' to save the configuration

8.4.15 Image and Text

Image and Text widgets are available at programmes, folders, portfolios and projects.
The Image and Text widget shows texts, images and hyperlinks to documents and websites.

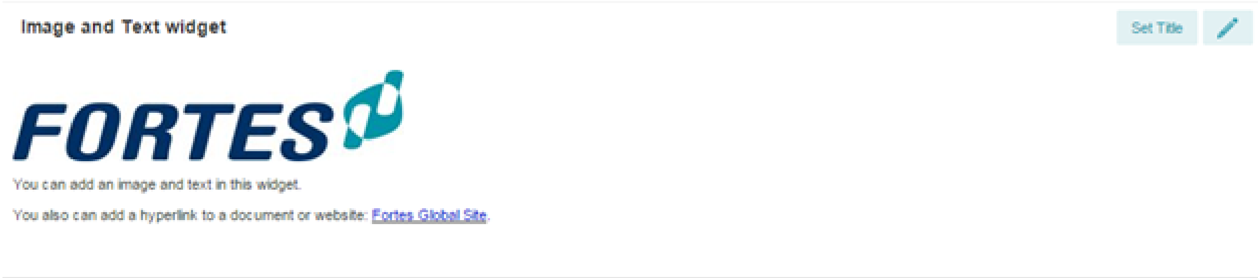
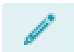


Image and Text widget

Configuring the Image and Text widget:

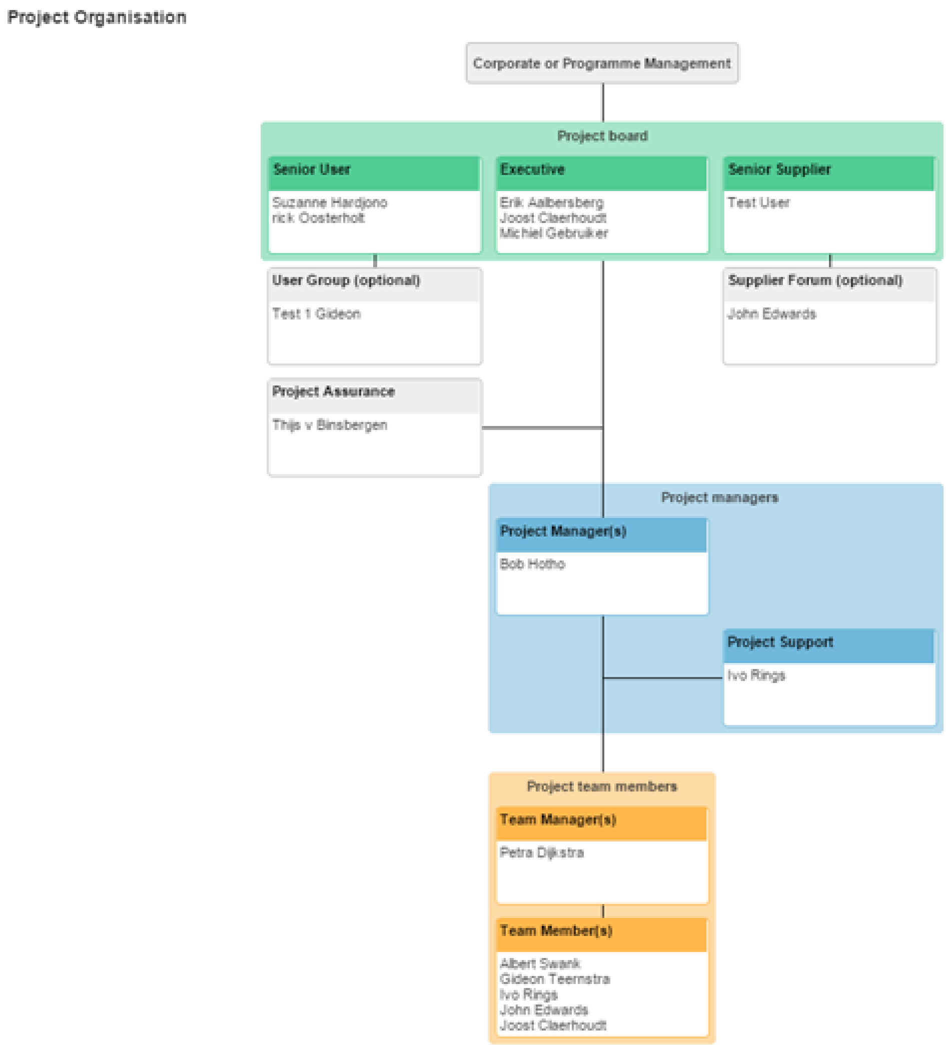
1. Click Set Title, a pop-up appears in which you can enter the title of the widget.

2. Click  to enable a rich text editor in which you can add images and hyperlinks or type a piece of text.

3. Click 'Save' to save the Image and Text widget.

8.4.16 Prince2 Organisation

The PRINCE2 Organisation widget is available at the project level only.
It visualises the PRINCE2 project organisation with all roles of the project.

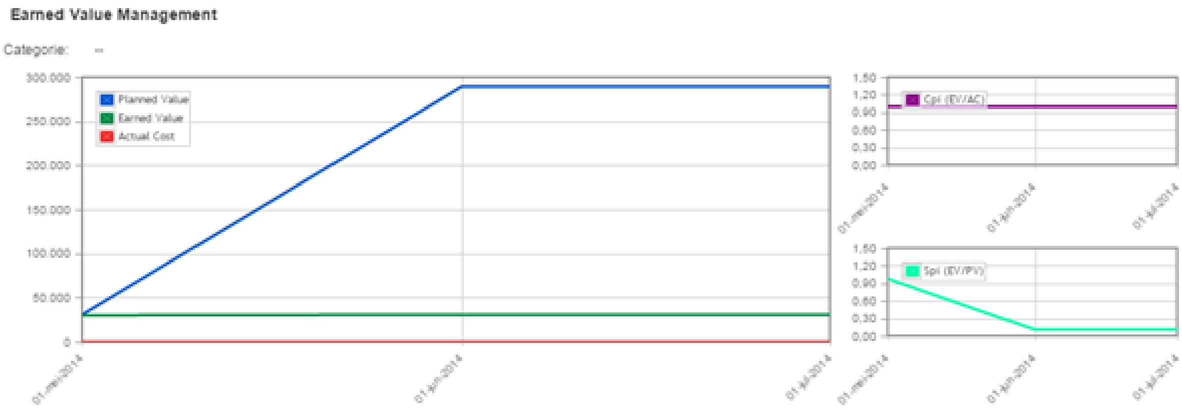


Configuring the PRINCE2 Organisation widget

The PRINCE2 Organisation widget is automatically configured based on the roles of the project members.

8.4.17 Earned Value Management (EVM)

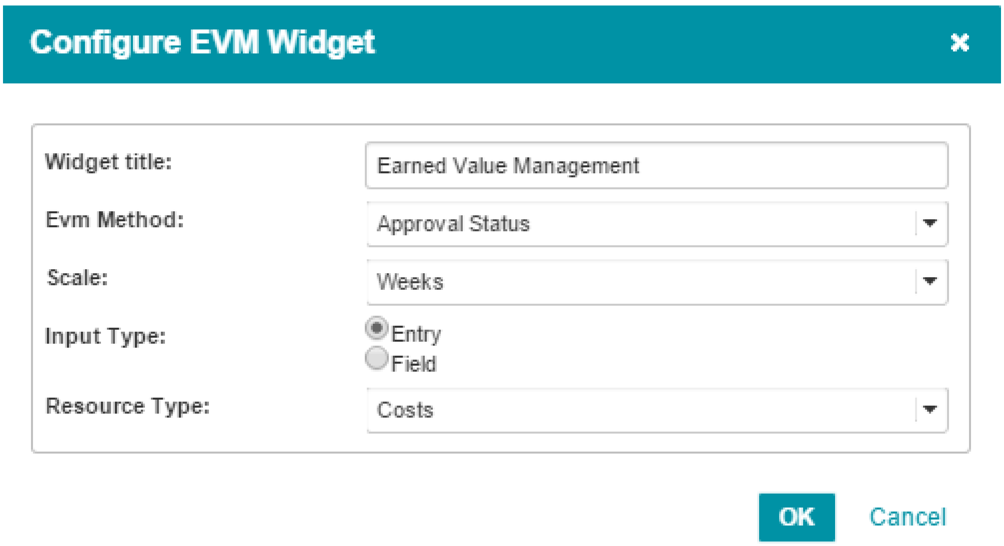
Earned Value Management (EVM) is available at the project level only.
It visualises the planned value, earned value and actual cost of a project (in both, a graph and a table).



			Status tot op heden			Budget en inschatting				Data en inschatting	
Naam	Budget	Plan	PV	EV	AC	BAC	ETC	EAC	VAC	Opgeleverd gepland	Opgele Foreca
Architectuur	●	●	9.500	5.500	0	9.500	0	0	-9.500	1-jun-2014	1-juli-20
Design	●	●	29.300	8.300	0	29.300	0	0	-29.300	1-jun-2014	1-dec-:
Test	●	●	33.080	3.180	0	33.080	0	0	-33.080	1-jun-2014	1-sep-:
Hardware	●	●	33.300	300	0	33.300	0	0	-33.300	1-jun-2014	1-nov-:
Engineering	●	●	184.200	13.200	0	184.200	0	0	-184.200	1-jun-2014	1-juli-20

Configuring Earned Value Management (EVM):

1. Click Configure , a pop-up appears.



Configuration of Earned Value Management (EVM)

2. Set the name of the widget.

3. Select the EVM Method (Approval Status, Category, etc.).

4. Select the scale (Weeks, Months, Quarters, Years).

5. Select the Input Type, either Entry or Field.

6. When the input is set to Entry; select the Resource Type (Costs or Hours).

7. When the input is set to Field; select a field to be used as Planned Value (ID, Outline Level, etc.).

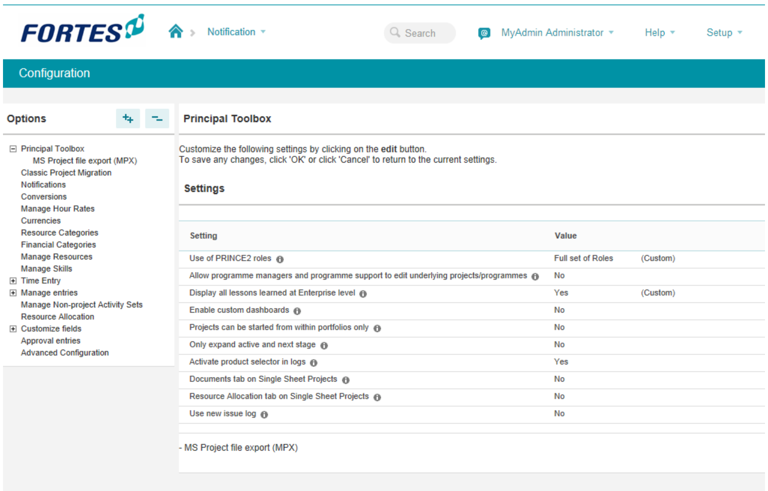
8. When the input is set to Field; select a field to be used as Actual Cost (ID, Outline Level, etc.).

9. When the input is set to Field; select the Category (Approval Status, Priority, etc.).

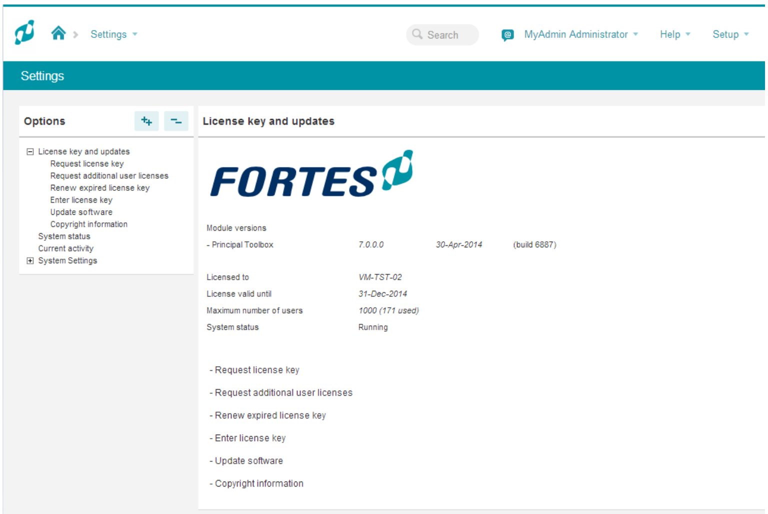
10. Click 'OK' to save the configuration

9 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.



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.

9.1 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 216
- Email notification 216
- Creating non-product activity sets 217
- Defining custom fields 220

9.1.1 Principal Toolbox

***Note**: this section is only relevant to system administrators.*

This is an overview of the 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 Toolbox				
		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 "
Time entry (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.

Advanced System Settings

Here only advanced system settings that are set to non-default values are shown. When a system setting is added with the default value, it will be automatically removed.

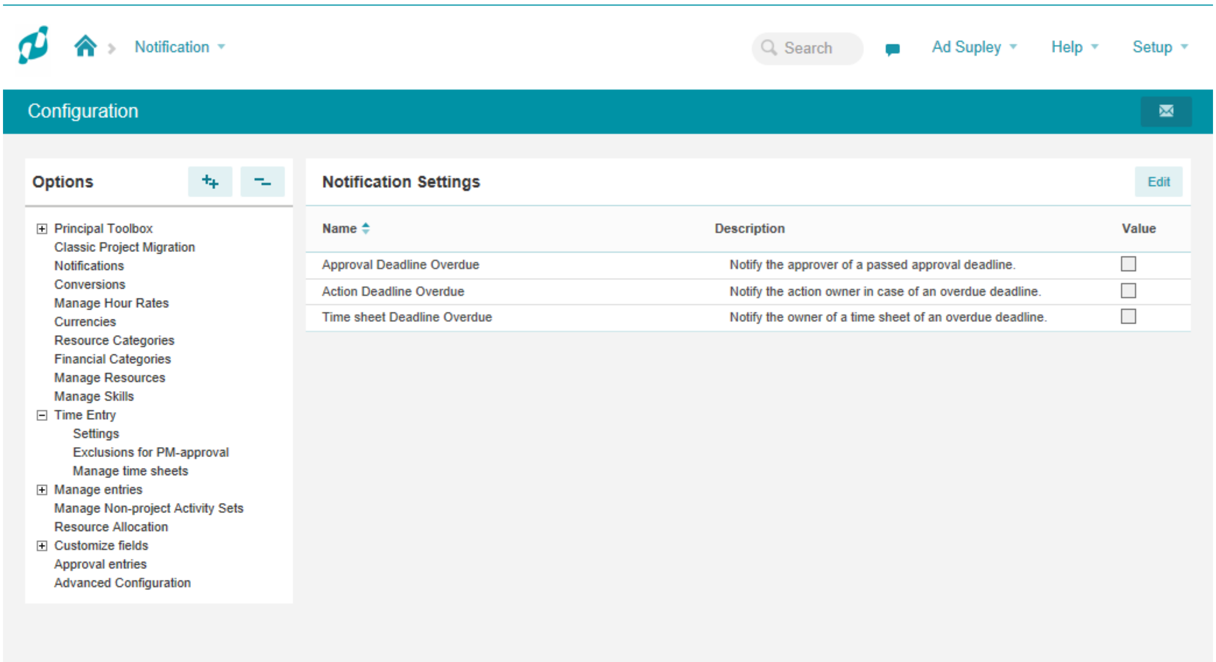
Before adding or changing anything contact our Customer Service desk (Tel: +31 88 - 888 42 22 or mail to support@fortes.nl)

9.1.2 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



Email notification settings

9.1.3 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.

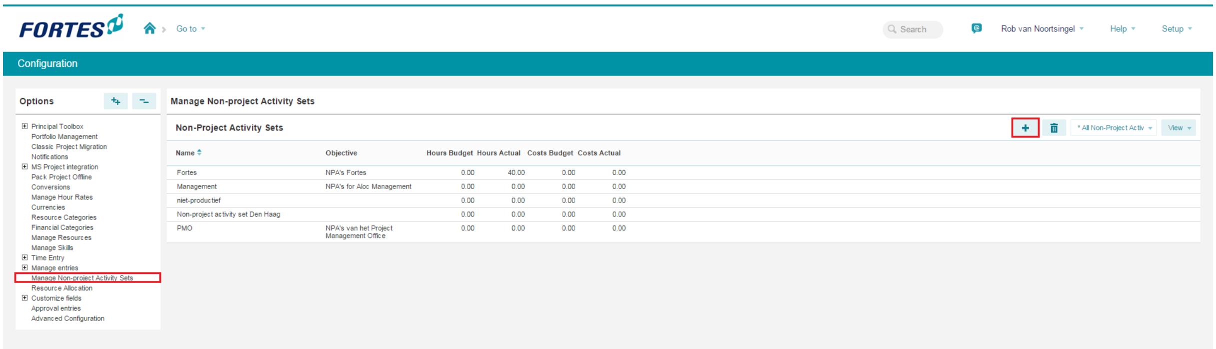
Different sets can be defined if different departments use different categories or have different non-project activities. It is also possible to have multiple non-project activity sets active for one group. So you could define one set for the entire organisation (e.g. with the categories sickness, leave), 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.



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.

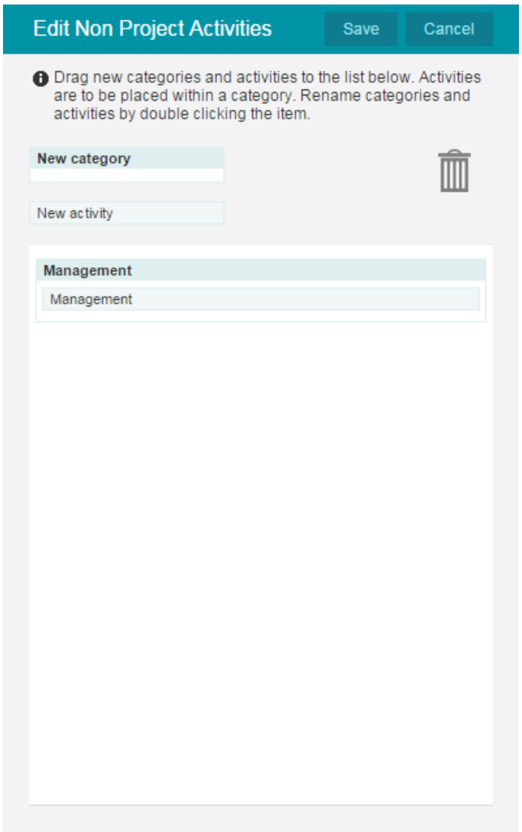
4. Click **OK** to create the non-project activity set.

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.



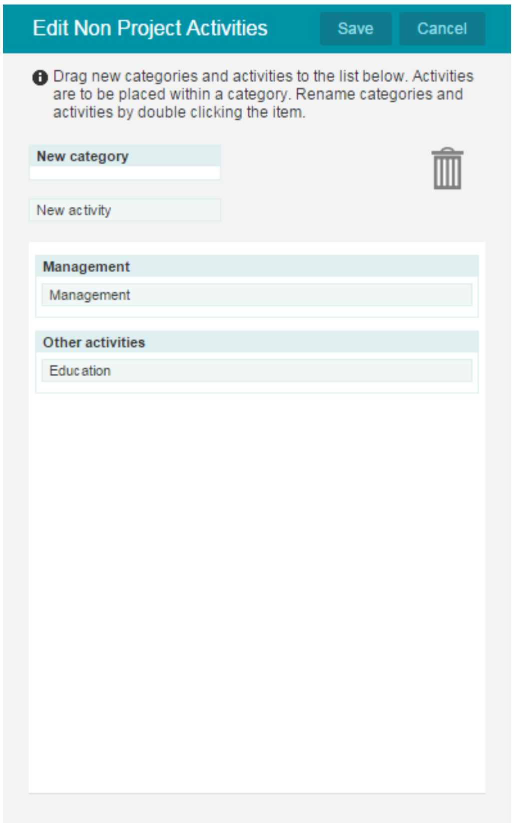
   b. In the pop-up, add a name for the category.

   c. Then, drag **new activity** into the category, as shown below.

   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.



Click **Save** to save the set. Close the window to go back to the time entry pages.

9.1.4 Defining custom fields

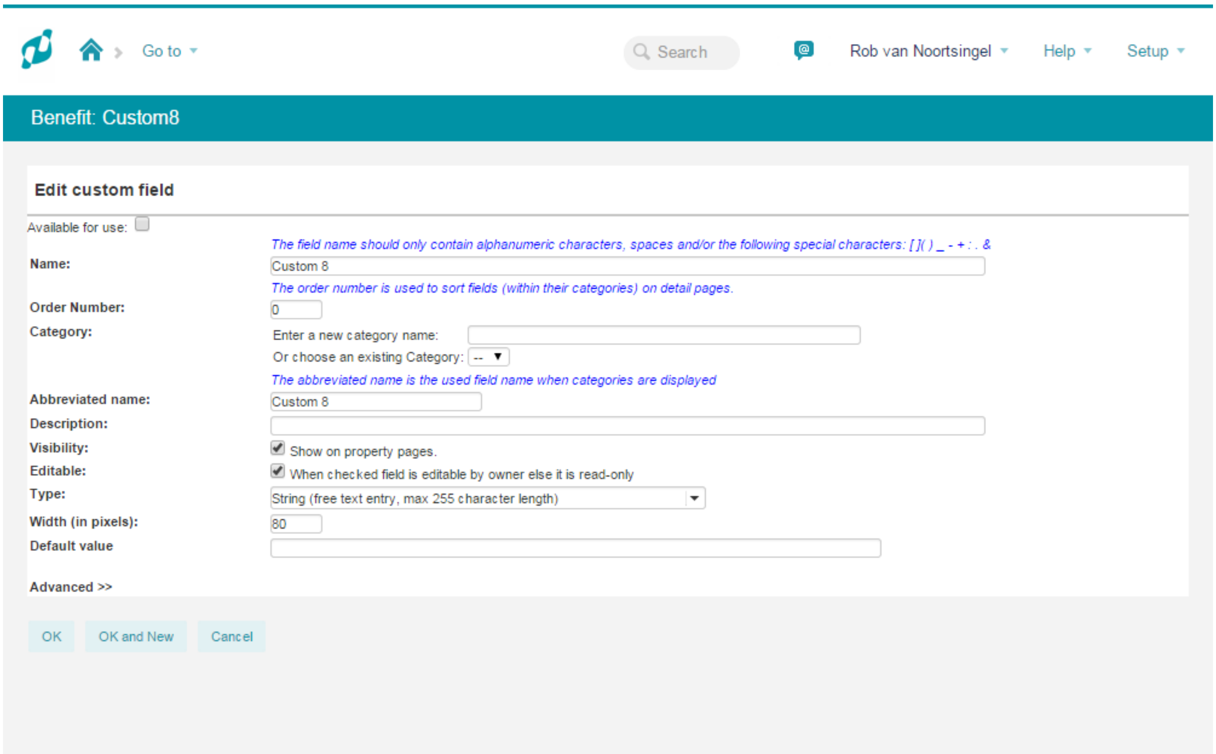
Within organisations there often is a need to define custom fields such as, for example; project costs, SAP numbers and project codes or there is the need to have extra fields on, for example the logs, the product page or a folder level. With the Principal Toolbox you are able to define these fields.

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 all available objects in the Principal Toolbox.

3. Click the specific item to define a custom field. Click **+** to define a custom field.



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.

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 +

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

9.2 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 221
management of users 223

9.2.1 Licenses

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

- Request license key 221;
- Request additional user licenses 222;
- Renew expired license key 222;
- Enter license key 222;

9.2.1.1 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.

9.2.1.2 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.

9.2.1.3 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.

9.2.1.4 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.

9.2.2 User administration

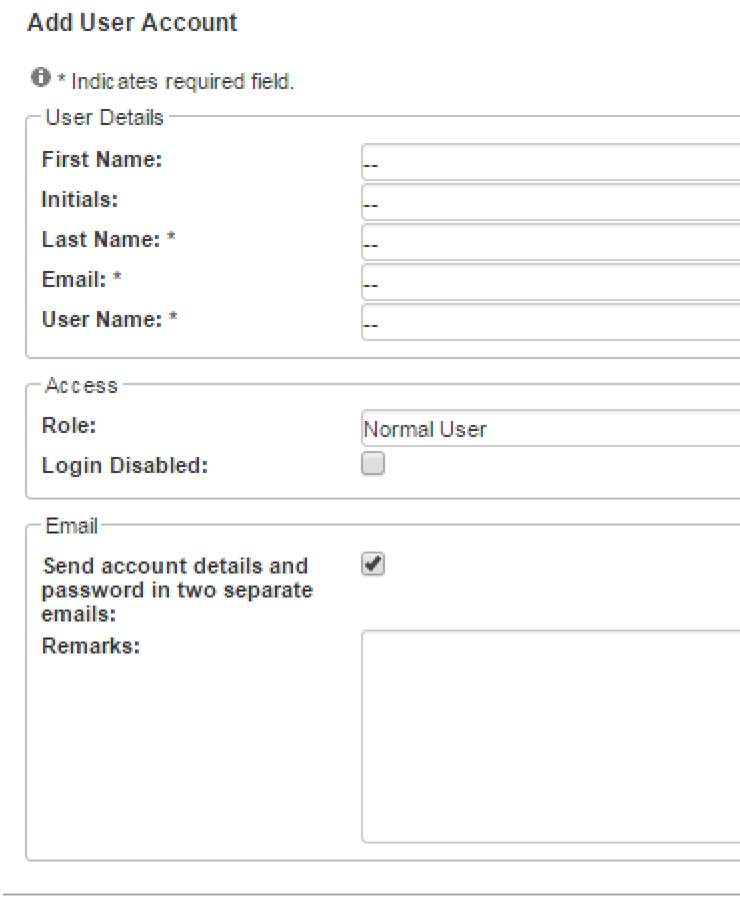
Control of users of the Principal Toolbox runs via de **Settings** page. Using the link **User Administration** you are able to control the existing users and to add new users.

1. Hover over '**Settings**'.

2. Click the link **User Administration**. A list of all users of the Principal Toolbox will appear.

3. Further click **+** in order to add a new user.

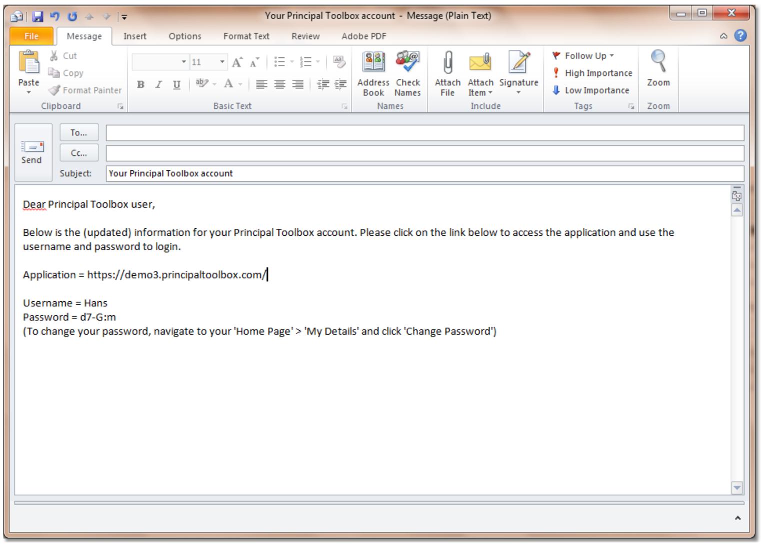
4. The screen *Add person* appears, fill in the following data:



Initials	:	Initials of the user.
Last name	:	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 folders 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.

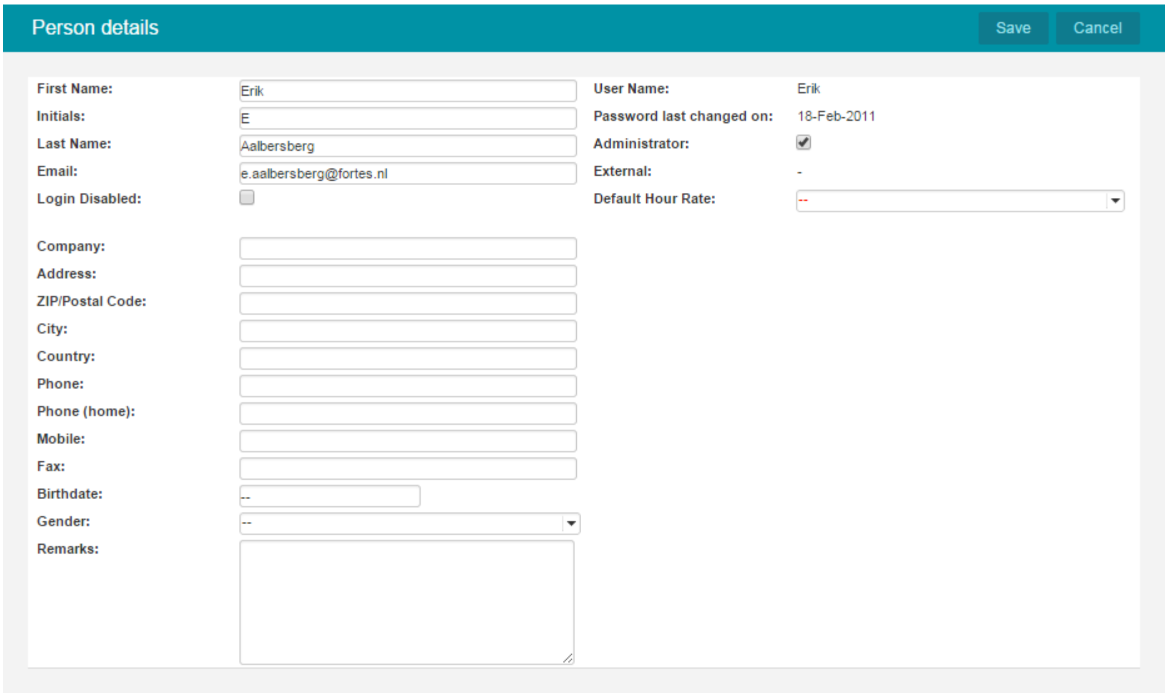
As of release 6.5, the Principal Toolbox allows for user groups 226 as well.

9.2.2.1 Personal details

Besides the basic information for the user login there is an option to add detailed information per user/ resource.

1. Go to the '**Settings**' page.
2. Click the link **User Administration**. A list of all users of the Principal Toolbox will appear.
3. Click a specific user/resource to add the detailed information.
4. Now click **Edit** to insert the following information:

Company	:	Name of the company.
Address	:	Address of the company.
ZiP/Postal Code	:	ZIP/Postal Code.
City	:	City where the office is located.
Country	:	Country where the office is located.
Phone	:	Office phone number.
Phone (home)	:	Private home phone number.
Fax	:	Fax number.
Mobile	:	Mobile phone number.
Birthdate	:	Date of birth.
Gender	:	Male or female.
Remarks	:	Any remarks.
Calendar	:	Calendars applicable to the user



Person details

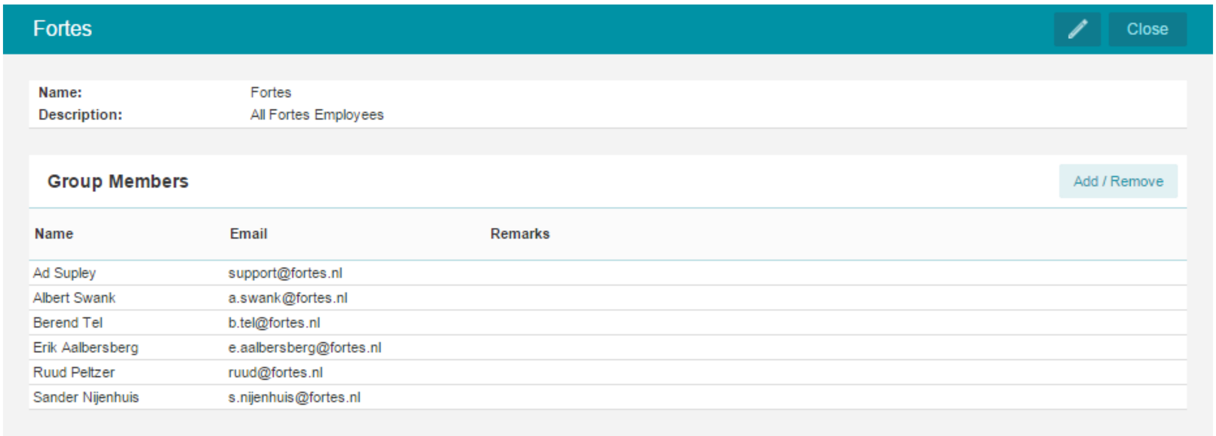
9.2.2.2 User Groups

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 (folder). 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 user administration 223 and click the '**Groups**' tab.

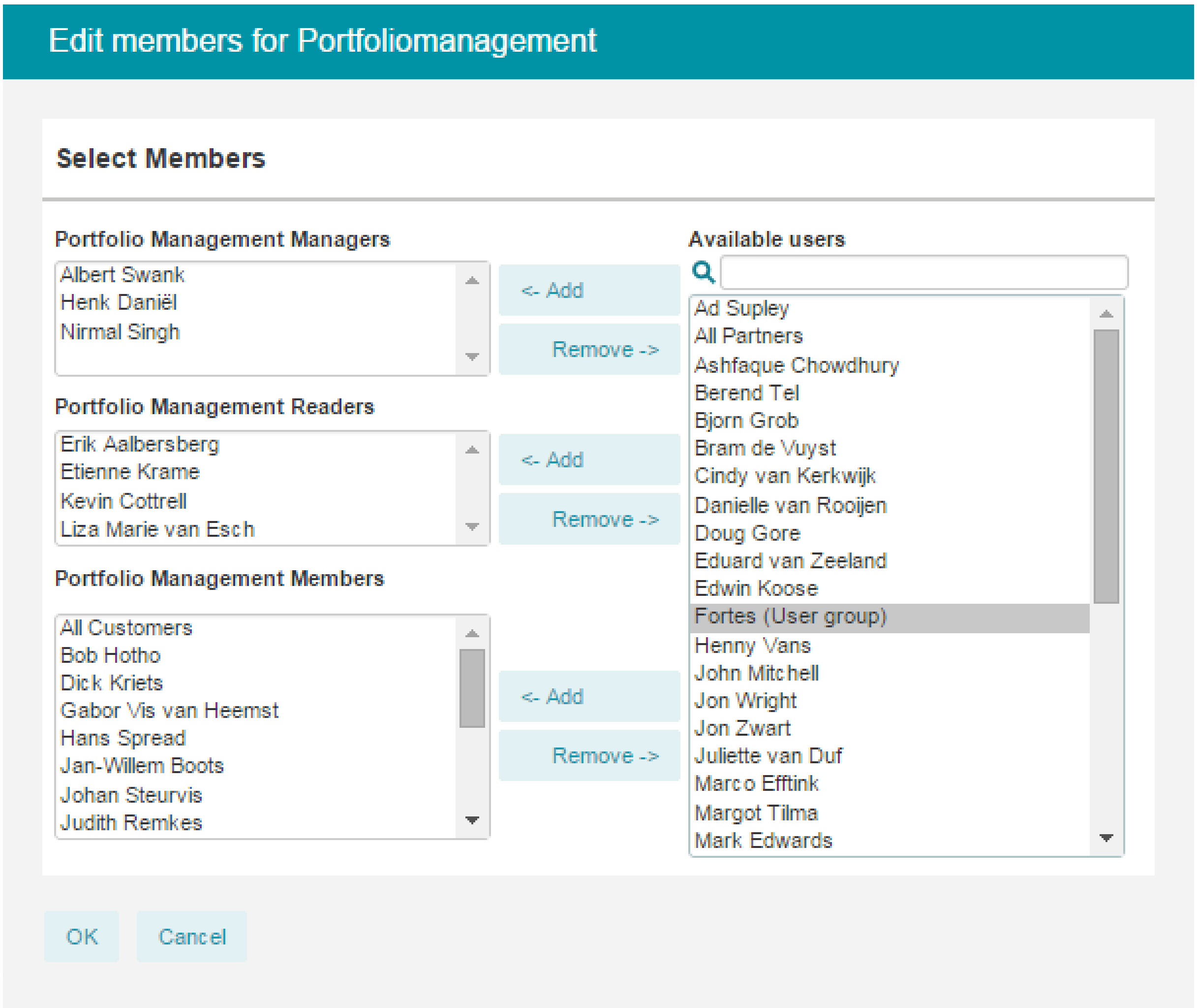
Create user group

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



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 folder or portfolio. Groups are shown in blue and have the text '(User group)' added to their name.



Edit members with groups

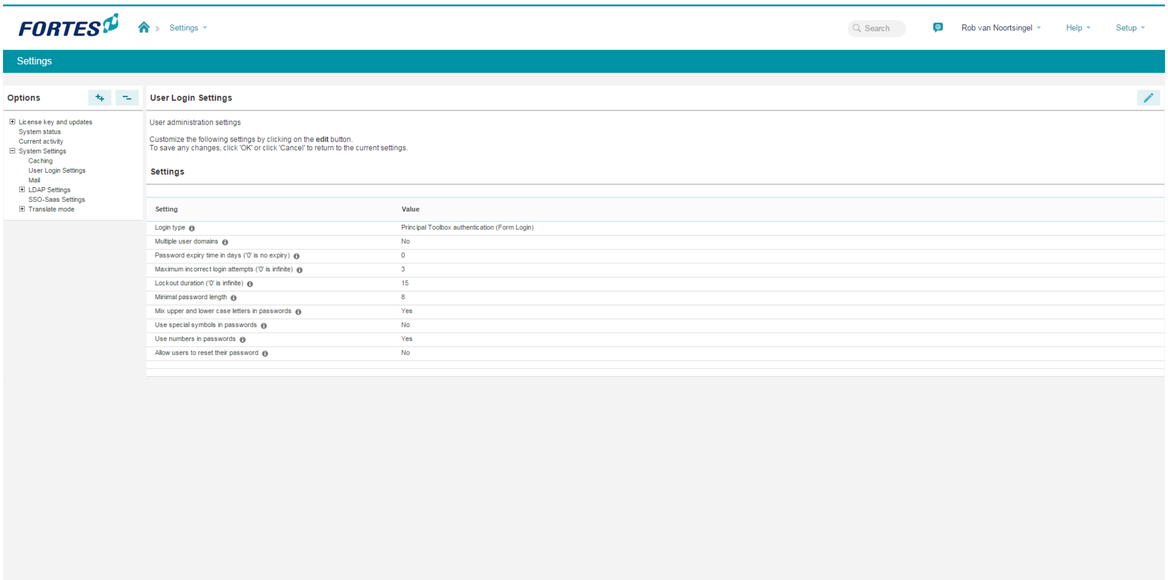
***Note**: In release 6.5 it is not yet possible to assign a user group to a time entry group.*

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 folder that are set to in the example above.

9.2.2.3 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

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.

Password reset

9.2.3 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 settings				
		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	Last name, 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 User administration > Advanced options 228		
	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 support@fortes.nl for more information about LDAP synchronisation and Single-sign-on options

Page	Link	Setting	Standard value	Remarks

9.2.4 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.

9.2.5 Classic Project Migration

As of release 6.5, classic PRINCE2 projects 118 can be migrated to generic PRINCE2 projects 78. By default, this option is not 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.*

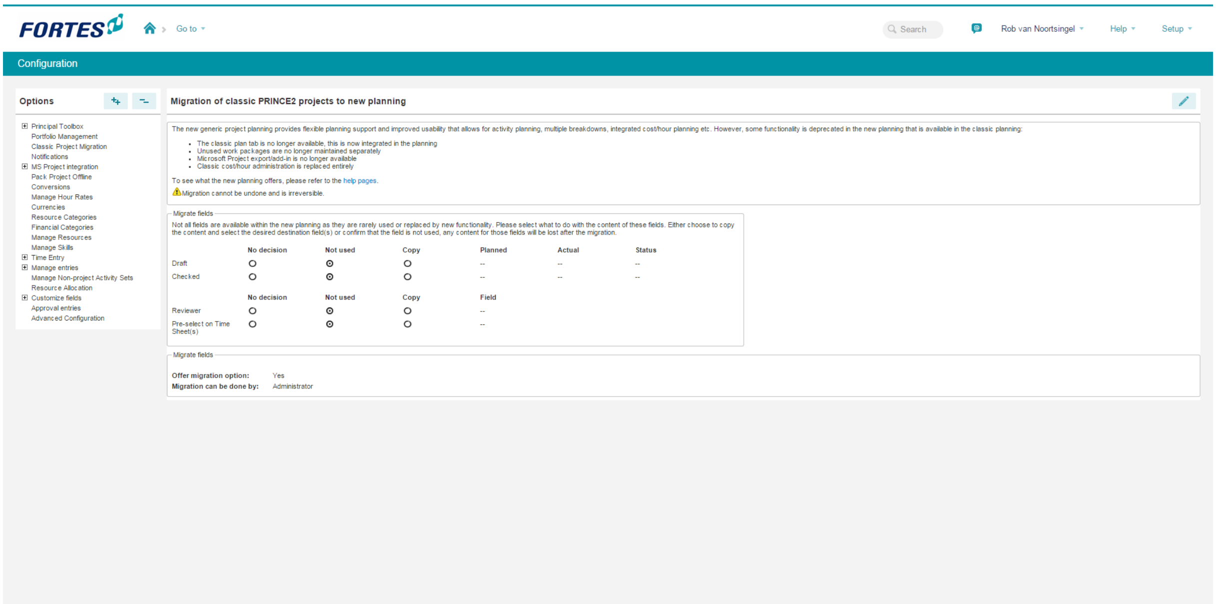
***Note**: Verify custom calculations on products and projects to be compatible with the new planning before migrating projects.*

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).

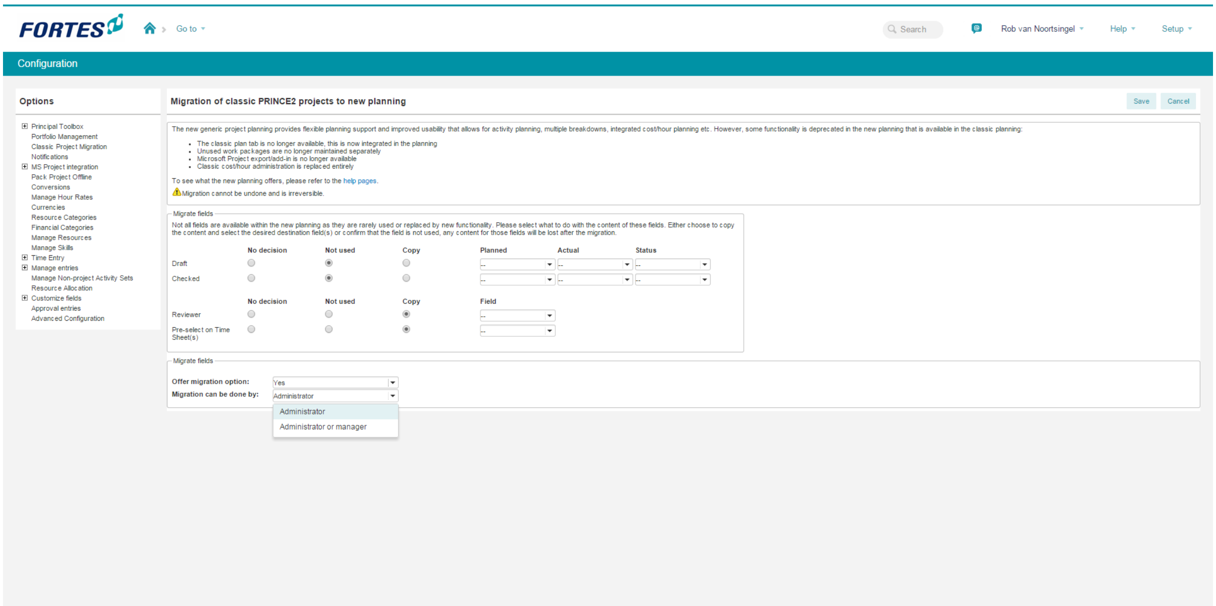


Migration of classic project planning

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 sheets

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.



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

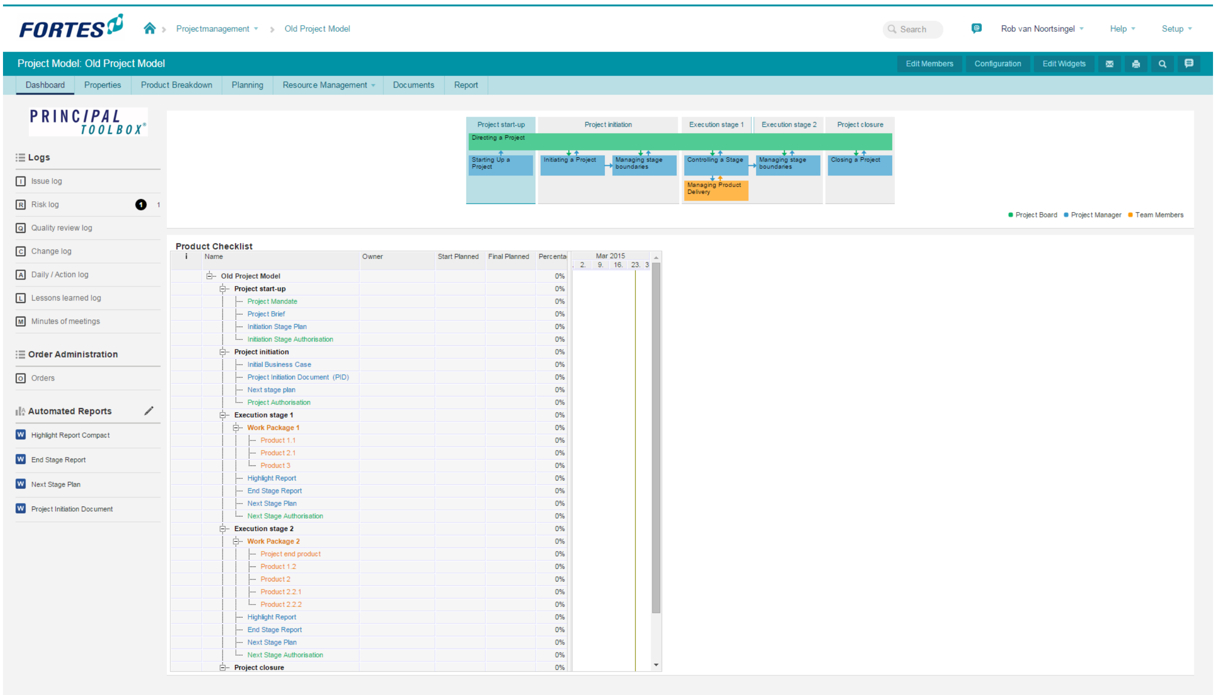
Once activated, the migration option is shown on project models.

> **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.

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:



10 Troubleshooting and Solutions

10.1 Troubleshooting

Sort	Issue	Solution
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.
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**

Sort	Issue	Solution
		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 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.
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 folders 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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SIMPLY FORTES.