Principal Toolbox 9.5

Principal Toolbox

User Manual

Fortes Solutions

Introduction to the Principal Toolbox 9.5 manual

1 Introduction to the Principal Toolbox 9.5 manual

The Principal Toolbox offers a powerful set of tools for managing projects, programmes and portfolios. This manual will help you with how to use the Principal Toolbox. The manual contains help on using your Home Page and on using the basic functions, and also contains all relevant use cases of all functional modules and the Principal Toolbox app.

Download the manual as a PDF file

You can download the complete manual as a PDF file: Manual Principal Toolbox 9.5.
The manuals of earlier releases of the Principal Toolbox are available as PDF files below:

- Manual Principal Toolbox 9.0 (PDF)
- Manual Principal Toolbox 8.0 (PDF)
- Manual Principal Toolbox 7.5 (PDF)
- Manual Principal Toolbox 7.0 (PDF)
- Manual Principal Toolbox 6.5 (PDF)
- Manual Principal Toolbox 6.0 (PDF)
- Manual Principal Toolbox 5.5 (PDF)

Please give us feedback on the manual

If you have any remarks or suggestions or if sections of this manual are unclear, please send us your feedback here.

What you can find in this manual

- The Home Page: this section explains how you can customise and use your Home Page,
- Basic Functions: this section is a must read! It explains many generic functions that you will find throughout the Principal Toolbox
- Working with Organisational units: this section explains how to create, configure, move or archive organisational units. It also explains the use of models.
- Working with Portfolio Management: this section explains all aspects of the Portfolio Management function.
- Working with Project Management: this section explains all aspects of the Project Management function, including working with the generic project, the single sheet project and the Agile project.
- Working with Resource Management: this section explains all aspects of the Resource Management function.
- Working with Time Entry: this section explains all aspects of the Time Entry function.
- Working with Ideas: this section explains how to create ideas and how to start an initiative from an idea.
- Working with Benefits: this section contains an introduction to the Benefits function.
- Working with the Principal Toolbox App: this section explains how to find, configure and use the app for reporting and time entry

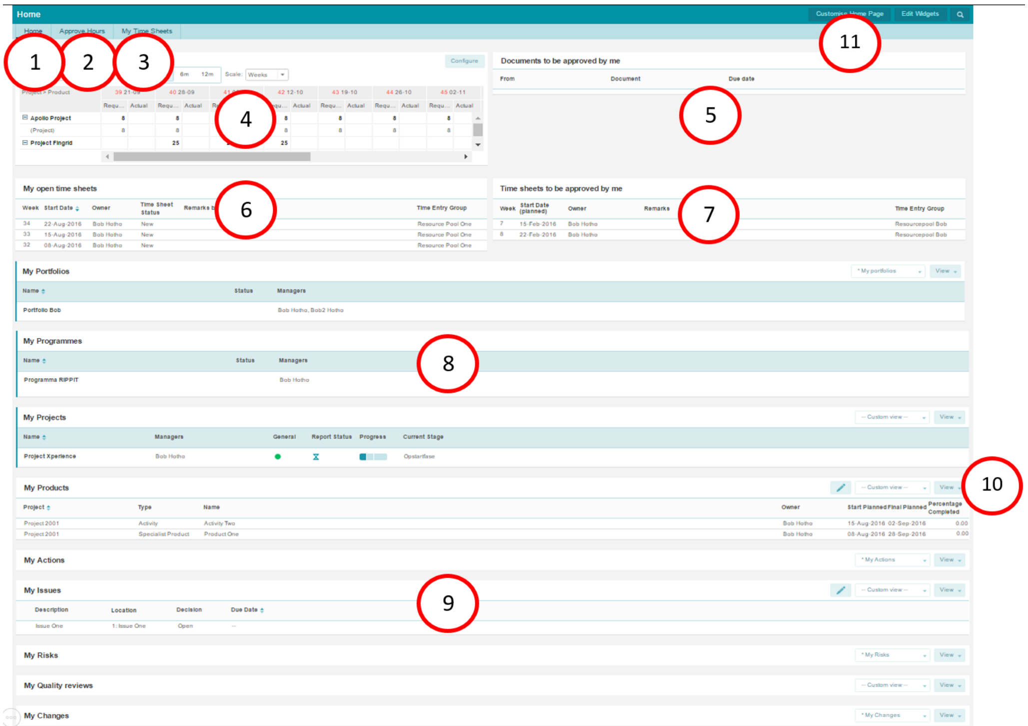
The Home Page

2 The Home Page

When you log in to the Principal Toolbox you will land on your Home Page. Your Home Page is your starting point for navigating and gives you an overview of all tasks assigned to you.

Examples of using of the Home Page are:

- Quickly navigate to your Project, Portfolio or Custom Dashboard.
- Check if you have outstanding portfolio report requests.
- Check all actions assigned to you, sort them on due date and edit them.
- Check all plan-items assigned to you, and update the percentage complete
- Find, enter and submit your time sheets.
- Approve time sheets.
- Approve documents that are assigned to you.



What you see on your Home Page:

1. The **tab Home** gives you an overview of all objects on which you have a role and of all plan-items and log-items that are assigned to you.
2. If you are a project manager, the **tab Approve Hours** shows an overview of project hours to be approved. See Approve Project hours 16.
3. The **tab My Time Sheets** gives you an overview of all your Time Sheets.
4. The **widget Hour Report** can be shown and can be configured to show your planned, allocated and actual hours in time.
5. The **widget Documents to by approved by me** shows a list of documents assigned for approval by you. See Approve a Document 18.
6. The **section My open time sheets** shows an overview of time sheets to be submitted by you. See Edit and Submit a Time Sheet 14.
7. If you are a line manager, the **section Time sheets to be approved by me** shows an overview of time sheets to approve. See Approve a Time Sheet 17.
8. These sections give you an overview of all portfolios, custom dashboard, folders,

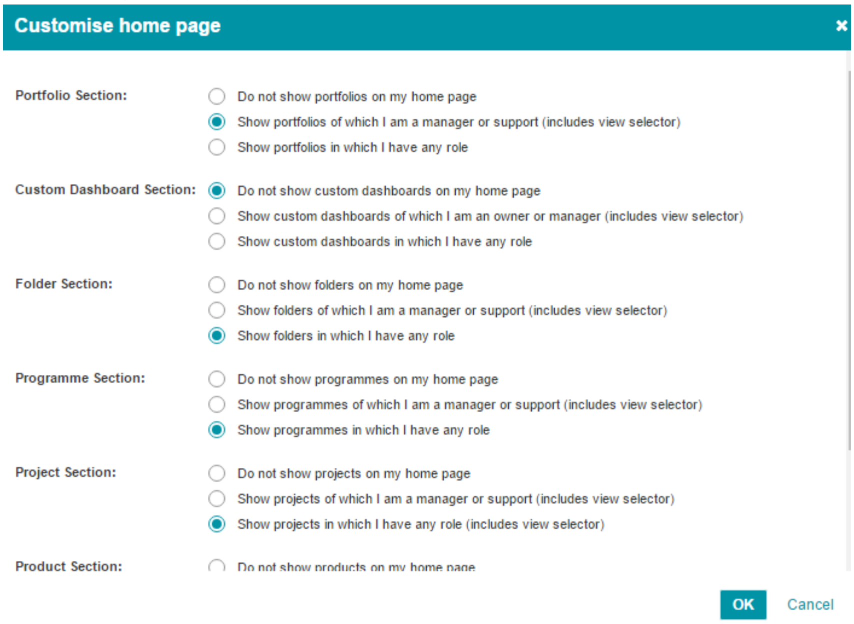
programmes and projects in which you have a role.

9. These sections give you an overview of all plan-items and all log-items of which you are the owner.
10. Use views to select or change views and, if applicable, edit information directly in the view. See Working with Views 23.
11. Click **Customise Home Page** to define which sections you want how to show on your Home Page. See Customise your Home Page 13.

2.1 Customise your Home Page

You can configure the layout of your **Home Page** to hide or show sections.

Step 1. On your **Home Page**, on the **tab Home**, in the top bar click on **Customise Home Page**, a dialogue box appears.



Dialogue Customise Home Page

Step 2. Use the radio buttons to hide and (how to) show sections on your Home Page, click **OK**.

2.2 Using your Home Page as a task list

Your Home Page shows all 'objects' on which you have a role, and all 'items' that have been assigned to you. You can use your Home Page for navigating and for an overview of all your tasks.

<u>Navigating using your Home Page</u>

Your Home Page contains different sections, showing for example all projects on which you have a role, all plan-items that are assigned to you, all actions that are assigned to you, and so on. You can click on the name, description or number of an item to navigate to it.

My Projects

Name	Managers	General	Report Status	Progress	Current Stage
5S	Michiel de Groot				Project start-up
AFVCCD upgrade + north	Michiel de Groot				Opstartfase
Apollo Project	Michiel de Groot, Michiel Bongenaar		✓		Full roll-out

The Home Page, section My Projects: click on a project name to navigate to that project

<u>Using your Home Page as a task list</u>

Your Home Page contains multiple sections with items that are a assigned to you. You can find Time Sheets to submit or approve, Documents to approve, plan-items to be delivered and actions, issues, risks, quality reviews and changes to follow up.

In all sections you can use views to show the information you want. Depending on your configuration you can edit information directly in the views and/or on the detail pages of the items. See Working with views 23.

<u>Some examples how to use the Home Page</u>

- In the section My Projects, use a view containing the field Report Status to quickly see if there are report requests from the portfolio manager.
- In the section My Products, use a view containing the field Percentage Complete and click to quickly update the status of the products you have to deliver.
- In the section My Actions, use a view containing the field Due Date and sort the view on it to quickly see which actions need your attention now.
- In the section My Issues, use a view containing the fields Remarks and Status and click to quickly update information and close issues.

2.3 Edit and Submit a Time Sheet

From your Home Page you can access all your Time Sheets. On the **tab Home**, the **section My open time sheets** contains a list of the Time Sheets you have to submit. The **tab My Time Sheets** shows a list of all your Time Sheets.

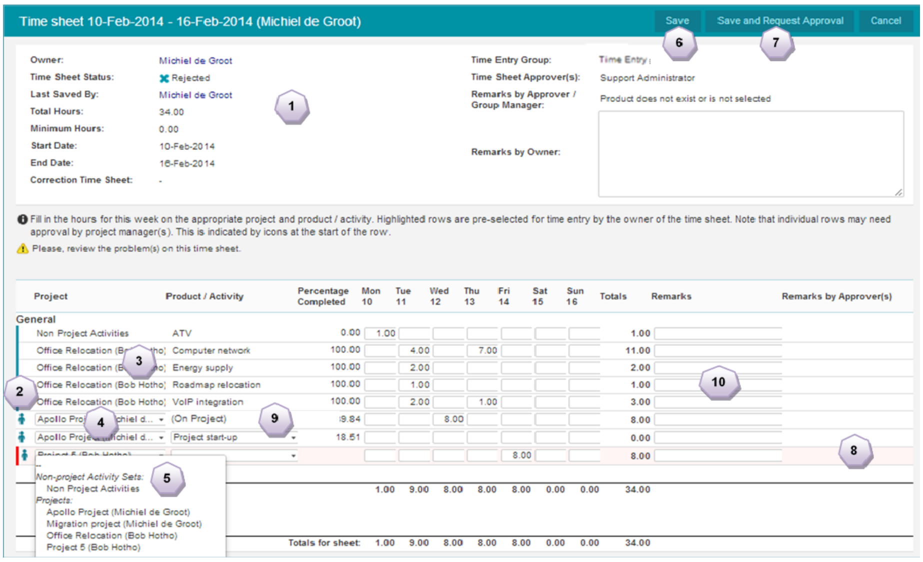
My open time sheets

Week	Start Date	Owner	Time Sheet Status	Remarks by Owner	Time Entry Group
21	May 23, 2016	Michiel de Groot	New		OU MichieldG
21	May 23, 2016	Michiel de Groot	New		Resource OU
21	May 23, 2016	Michiel de Groot	New		Organisatie

The section My open time sheets on the tab Home of the Home Page

<u>Edit and submit a Time Sheet</u>

On your **Home Page**, **tab Home**, **section My open time sheets**, click on the date of the Time Sheet, the Time Sheet opens.



A Time Sheet

1. The top part of the Time Sheet contains the general information data of the Time Sheet, such as the minimum amount of hours to justify and the status of the Time Sheet.
2. On the left of the Time Sheet you can see icons and coloured lines. The doll icon indicates that the hours on this row will have to be approved by the project manager. A red bar indicates that not all mandatory columns have been filled; this red bar will only appear at the moment you save the Time Sheet.
3. The Time Sheet can be configured to display a predefined set of rows. These rows are indicated with a blue line on the left of the row.
4. The Time Sheet will also show an empty row. As soon as you enter information in that row, a new row will appear.
5. In the first column of these rows you can select the project or the 'non-project activity set' you want to enter time on. In the second column you can select the plan-item or activity you want to enter time on. Then enter the appropriate amount of hours for the days they occurred. In the column Remarks you can enter remarks regarding a Time Sheet row.
   Note: a Time Sheet by definition will only show projects on which you have a role.
   Note: if a project is configured to allow time entry on project level only, it is not possible to enter a plan-item in the second column.
6. Click **Save** to save the Time Sheet as a draft and to continue working on it later.
7. Click **Save and Request Approval** to submit a Time Sheet.
   Note: for approving project hours see Approve and Reject project hours 16, for approving non-project hours see Approve a Time Sheet 17.
   Note: if no approval process is configured, this button will show **Save and Close**.

2.4 View your Time Sheets

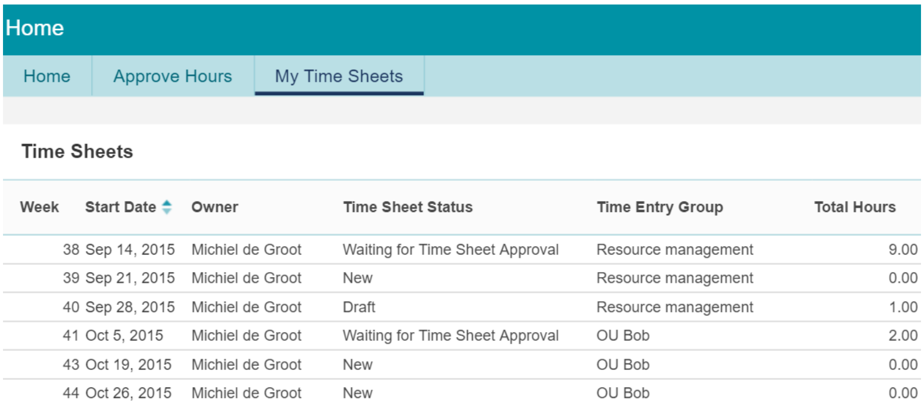
On your Home Page the **tab My Time Sheets** shows a list of all your Time Sheets.

Step 1. Navigate to your **Home Page**, **tab My Time Sheets**.

Step 2. Use the views to view your approved or pending Time Sheets. For more information see Working with views 23.

The predefined views on the Home Page, tab My Time Sheets

Step 3. The views show a list of your Time sheets and their statuses. Click on a **Start Date** to open and view a specific Time Sheet.



Week	Start Date	Owner	Time Sheet Status	Time Entry Group	Total Hours
38	Sep 14, 2015	Michiel de Groot	Waiting for Time Sheet Approval	Resource management	9.00
39	Sep 21, 2015	Michiel de Groot	New	Resource management	0.00
40	Sep 28, 2015	Michiel de Groot	Draft	Resource management	1.00
41	Oct 5, 2015	Michiel de Groot	Waiting for Time Sheet Approval	OU Bob	2.00
43	Oct 19, 2015	Michiel de Groot	New	OU Bob	0.00
44	Oct 26, 2015	Michiel de Groot	New	OU Bob	0.00

The Home Page, tab My Time Sheets

Explanation of the Time Sheet states:

- New: The Time Sheet is new and not been saved or submitted.
- Draft: the Time Sheet is saved (as a concept) but not yet submitted.
- Waiting for Project Manager Approval: the Time Sheet is submitted and waiting for the project manager(s) to approve the project hours.
- Waiting for Time Sheet Approval: the Time Sheet is waiting for the line manager to approve the non-project hours.
- Approved: the Time Sheet is approved.
- Rejected: the Time Sheet has been rejected by the project manager or the line manager.
- Reopened: a previously approved Time Sheet has been reopened for the employee to edit and submit the Time Sheet again.

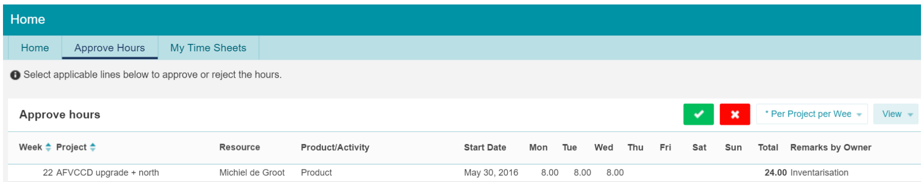
2.5 Approve Project hours (by a Project Manager)

Principal Toolbox can be configured for actual hours entered on a project to be approved by the project manager. The **Home Page** of the project manager, on the **tab Approve Hours** shows a list of all hours entered on the project that have to be approved.

Approve project hours

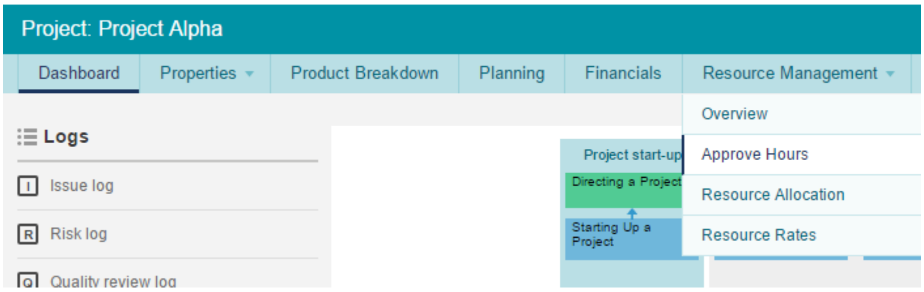
Step 1. Navigate to your **Home Page**, **tab Approve Hours**. This tab shows a list of all hours that are entered on your project(s) and have to be approved.

Step 2. Select on or more rows and click ✓ to approve, or ✗ to reject hours. Optionally add a remark.



The Home Page, tab Approve Hours

Note: Hours to be approved can also be found in the projects themselves, on the **tab Resource Management**, **sub-tab Approve Hours**:



Project tab Resource Management, sub-tab Approve Hours

2.6 Approve a Time Sheet (by a Line Manager)

Principal Toolbox can be configured for actual hours entered on a non-project to be approved by the line manager. The **Home Page** of the line manager, on the **tab Home**, **section Time sheets to be approved by me** shows a list of all Time Sheets that have to be approved.


Time sheets to be approved by me

Week	Start Date	Owner	Remarks	Time Entry Group
21	May 23, 2016	Michiel de Groot		Time Registration

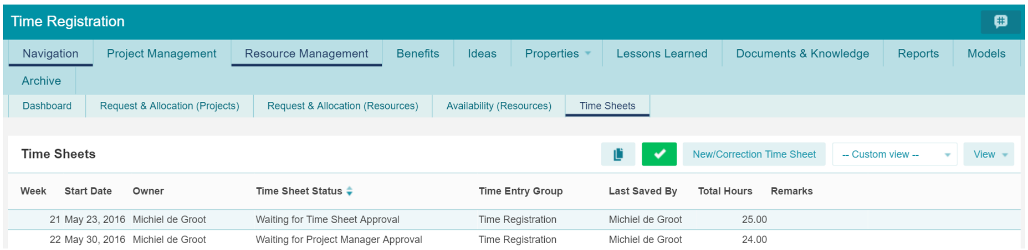
The Home Page, section Time sheets to be approved by me

Approve a Time Sheet

Step 1. Navigate to your **Home Page**, **tab Home**, **section Time sheets to be approved by me**. This section shows a list Time Sheets that have to be approved. Navigate to a Time Sheet by clicking on the start date.

Step 2. Review the content of the Time Sheet and click ✔ to approve, or ✖ to reject the Time Sheet. Optionally add a remark.

Note: Time Sheets to be approved can also be found on the **tab Resource Management**, **sub-tab Time Sheets**. Here it is also possible to select multiple rows and approve or reject them.



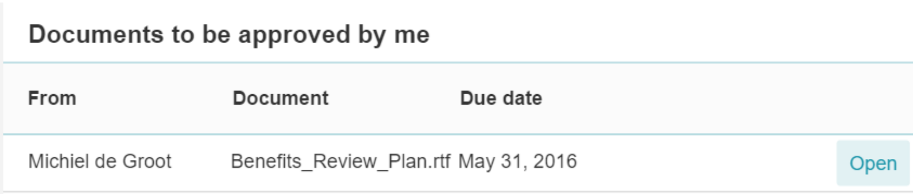
Tab Resource Management, sub-tab Time Sheets

2.7 Approve a Document

Principal Toolbox supports the approval of documents. On your **Home Page**, the **section Documents to be approved by me** shows a list of all documents that you have to approve.

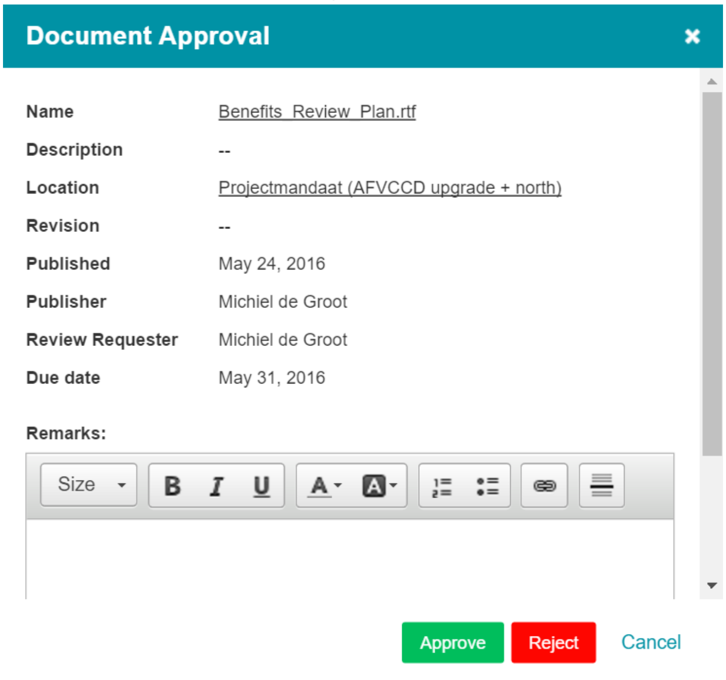
<u>Approve a document</u>

Step 1. Navigate to your **Home Page**, to the **section Documents to be approved by me**. This sections shows a list of documents waiting for your approval.



The Home Page, section Documents to be approved by me

Step 2. In a row, click **Open**, a dialogue box appears.



The Dialogue Document Approval

Step 3. Click on the **name of the document** to open it. After reviewing the document, click **Approve** or **Reject**, the dialogue box closes. Optionally add remarks.

Basic functions

3 Basic functions

In this section you find an overview of many common or 'basic' functions that you will find throughout Principal Toolbox. In order to effectively use Principal Toolbox we strongly recommend that you gain knowledge about these basic functions. Every main topic in this manual contains references to the basic functions that apply there.

The next topics cover all relevant use cases when using the basic functions.

3.1 Logging in

You can log in to the Principal Toolbox once the system administrator has created a user account for you. Note that some organisations make use of the single sign-on function; if that is the case you can automatically log in with your organisation account.

Logging in

Step 1. Start your web browser and navigate to the log in page of the Principal Toolbox; use the internet address found in the email you received from your administrator.

Step 2. Fill in your user name and password, both of which you have received by email from your administrator, and click **OK**. The Principal Toolbox opens on your Home Page.

Note: Depending on the configuration you might (periodically) be asked to change your password. See Change your Password 20.

Note: If you forgot your password, see Change your Password 20.

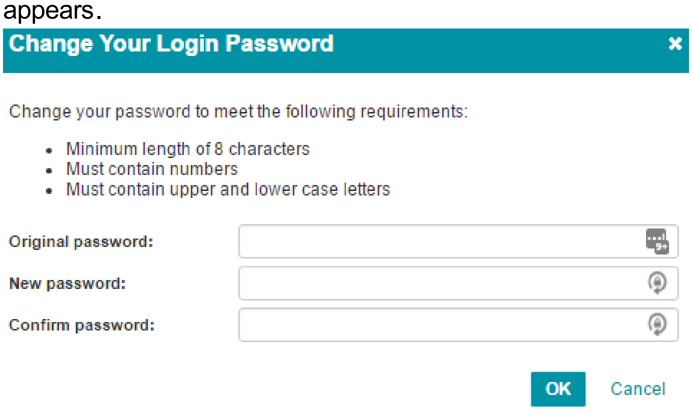
3.2 Change your Password

You can change your existing password, and, if you forgot your password, you can request a new one.

Change your password

Step 1. In the top bar of the Principal Toolbox, click on **Your Name**, then click on **My Profile**, a new screen appears.

Step 2. In the screen **Profile**, in the top right, click **Change Password**, a dialogue box appears.



Dialogue box Change Your Login Password

Step 3. Enter the original password, then enter your new password twice and click **OK**.

Request a new password

Depending on the configuration you can do this yourself. If step 2 cannot be completed due the lack of the button, please contact your administrator.

Step 1. Navigate to **the log in page** of the Principal Toolbox.
Step 2. Under the button **Login**, click on **Forgot your password?**, a pop-up appears.
Step 3. Enter your username and email and click **OK**.
Step 4. Check your mail for a message from Principal Toolbox and follow the instructions.

Note: If you forgot your username, please contact your administrator.

3.3 My profile

Every user in the Principal Toolbox has a user profile. In this profile you can add or change personal information such as name and email address. Also, depending on your configuration, you can select a personal language preference.

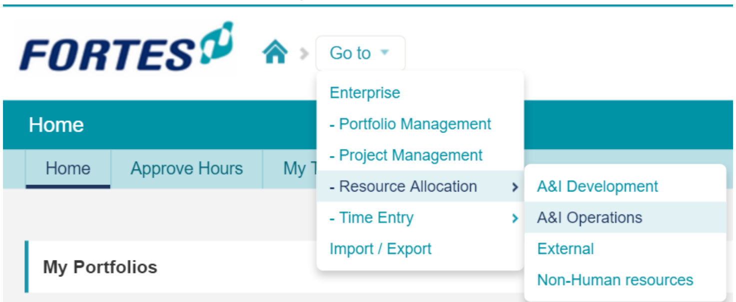
Change your profile
Step 1. In the top bar of the Principal Toolbox, click on **Your Name**, then click on **My Profile**, a new screen appears.
Step 2. In the screen **Profile**, in the top right, click to enter the edit mode.
Step 3. Enter and/or change information in the screen. In the **section Profile Picture** a profile picture can be added by clicking in the section or by using drag and drop; note that the file in question cannot exceed 100KB.
Step 4. When you have entered all information, click **Save**.

3.4 Navigation

This topic describes several ways of navigating the Principal Toolbox.

Navigate using the Home Page
For information on how to use your Home Page for navigation, see The Home Page 12.

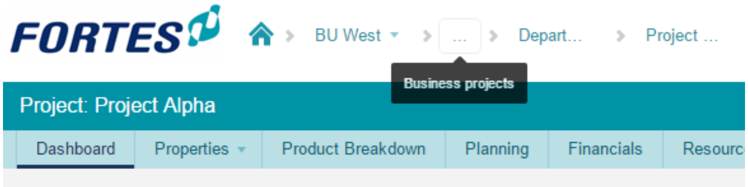
Navigate with the drop-down list in the top bar
You can also navigate using the drop-down list in the top bar. With this drop-down list you can navigate through the hierarchy that is configured in your Principal Toolbox. This hierarchy will often resemble your organizational structure. In the example below the drop-down is used to navigate to the resourcepool "A&I Operations".



Navigation with the drop-down list in the top bar

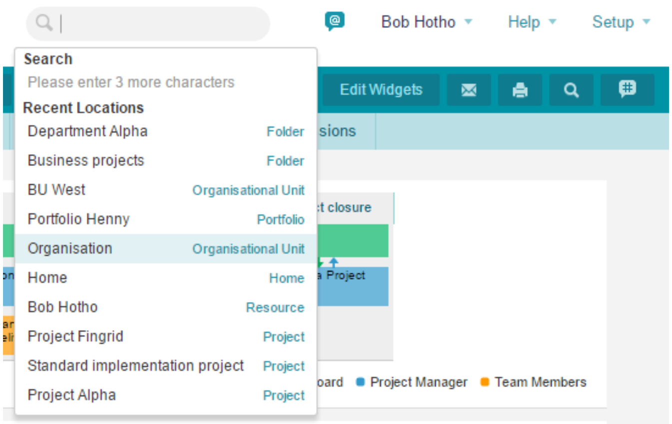
Navigate with the breadcrumb trail
The top bar will always show the 'breadcrumb trail' that leads to your current location in the Principal Toolbox. You can click in the breadcrumb trail and so use it for navigation.

If the trail is long, hover over a position in the trail to display the full name of that location. The breadcrumb trail leads back only to the level of the first above organisational unit.



Example of the breadcrumb trail

Navigate with Quick Search
You can use the Search box in the top bar to find portfolio's, portfolio-items, folder, projects, programmes, plan-items and more. Click on **Search** to show a drop-down that contains two sections: **Search** and **Recent Locations**. Enter a minimum of 3 characters to get search results that match your (partial) description; the dialogue will show up to 10 of all of the matching results. The drop-down will also show up to 10 of your recently visited locations in the Principal Toolbox. Navigate by clicking a name in the drop-down.



Using the Search box to navigate

3.5 Search

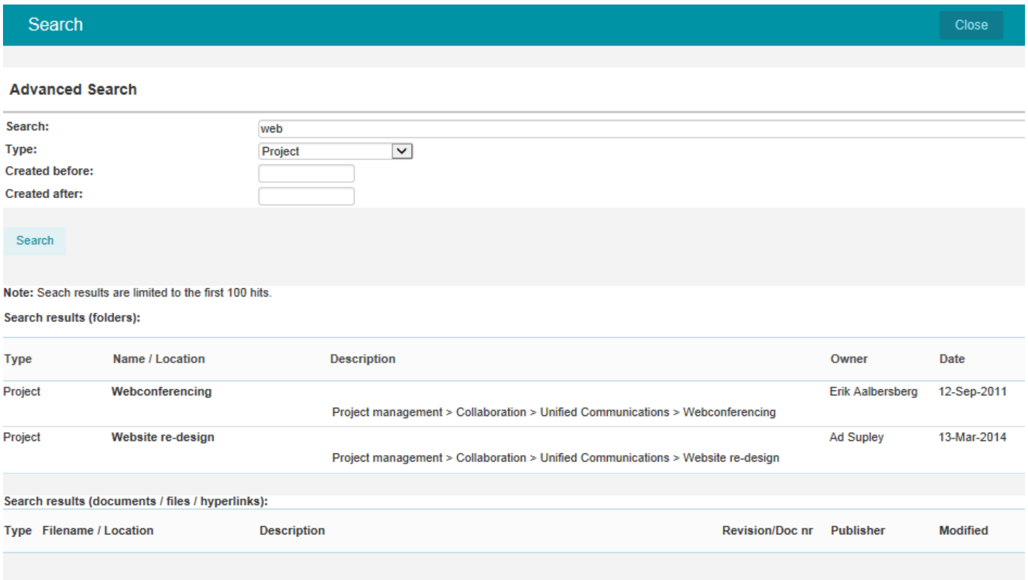
Apart from navigation the Principal Toolbox supports two search functions: Quick Search and Advanced Search.

Quick Search
Quick Search is always available in the top bar. See Navigation, Navigate with Quick Search 21.

Advanced Search
Advanced search is available on many locations in the Principal Toolbox such as organisational units, portfolios, programmes, folders and projects. Advanced Search shows as the icon on the right side of the dark blue header in the top of your screen. With Advanced Search you can search on more object types (e.g. issues, risks and

plan-items), you can use a filter on the creation date, and you can also search for documents.

Step 1. Click on the icon on the right side of the dark blue header in the top of your screen, a dialogue box appears.
Step 2. Enter the name of the item you are looking for, optionally select an object type, optionally add a filter on the creation date, and click **Search**.
Step 3. The search results are shown at the bottom of the screen.



Dialogue box Advanced Search

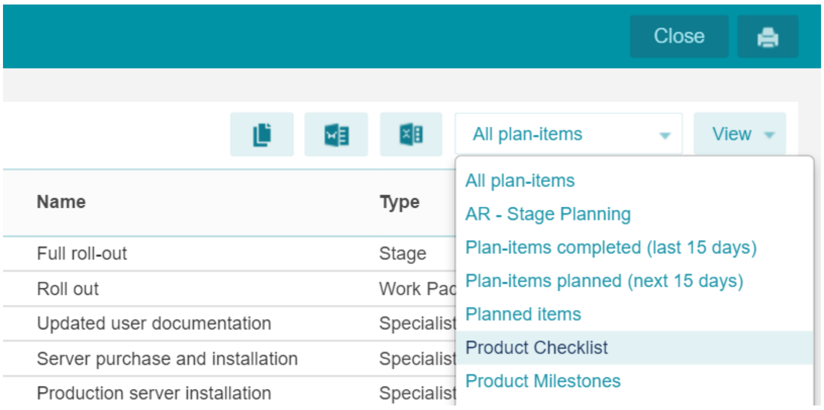
3.6 Reporting: Working with Views

The Principal Toolbox supports a variety of ways to present data, ranging from on screen lists, to on screen visuals, to tailor made reports in Excel or Word.

Views basically are tables showing a set of fields on a list of items. Views can be found and used throughout the Principal Toolbox, e.g. on your **Home Page**, in **Dashboards**, in **Folders**, in **Logs**, and in the **section Reports**.

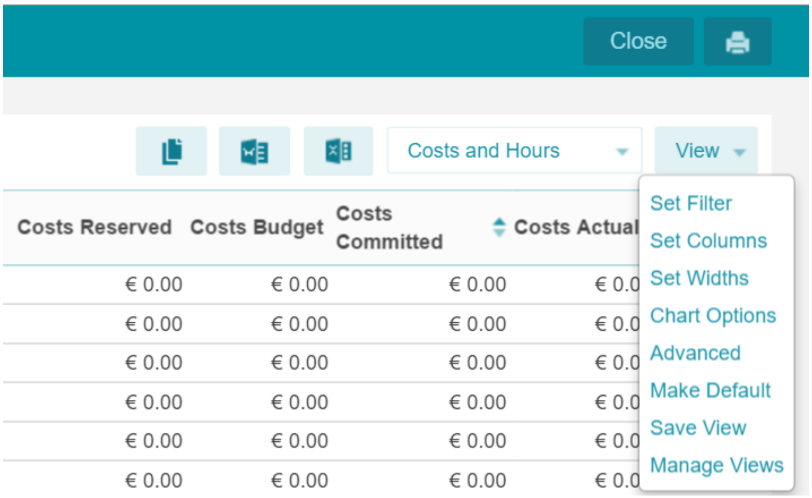
You can use views in many ways:
- Use (predefined) views for on screen reporting and in-view-editing. See Use Views to View or Edit data 24.
- Create views for ad hoc on screen reporting. See Create a View: set columns 25, and Create a View: set a filter 26.
- Save views for re-use by you, or for e.g. every team member in your project. See Save a View for re-use 27.
- Quickly export a view to Excel, Word or the Clipboard. See Quickly export a View Excel, Word or Clipboard 27.

Clicking on the **View-name** shows a drop-down list of available (predefined) views:



Drop-down list of available views

Clicking on **View** shows an options menu:



Drop-down list of view options

The view options are:

Set Filter : define a filter for the view, see Create a view: set a filter 26.

Set Columns : define the columns in the view, see Create a view: set columns 25.

Set Widths : change the column widths; drag the line between columns to increase or decrease the column size.

Chart Options : show the view as a chart.

Advanced : extra settings (e.g. show column totals)

Make Default : make a view your personal default view; it will be shown when opening this tab.

Save View : save the view, see Save a view for re-use 27.

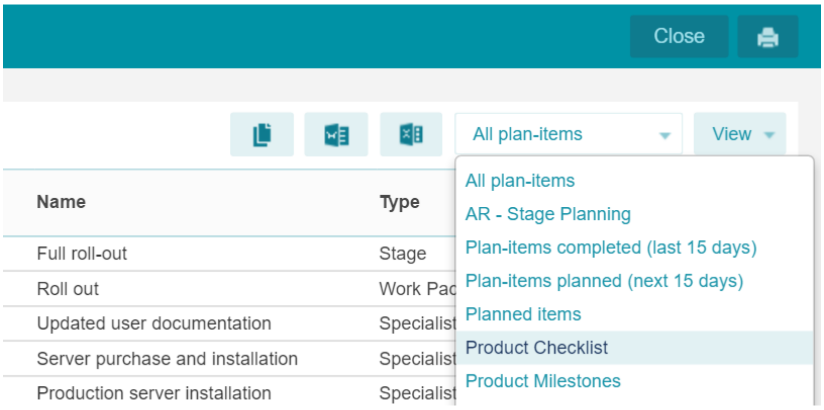
Manage Views : manage the properties of all views available on this location, see Managing views 28.

3.6.1 Use Views to view or edit data

Views basically are tables showing a set of fields on a list of items. Views can be found and used throughout the Principal Toolbox, e.g. on your **Home Page**, in **Dashboards**, in **Folders**, in **Logs**, and in the **section Reports**.

Using views for viewing data

Views exist on objects in Principal Toolbox, e.g. on portfolio-items, on projects or on issues or actions. Wherever views are available you can quickly find and select predefined views by clicking on the view name, and then clicking in the drop-down list that appears. In this way you can quickly select and switch between views to view relevant information.



Navigate to predefined views by clicking on the view name

You can create ad hoc views to view other information then available in the predefined views. See [Create a View: set columns](25), and [Create a View: set a filter](26).

Using views for editing data

Depending on your role, and depending on the configuration, on your **Home Page**, in **Dashboards** and in **Logs** you can edit data directly in a view.

If your role allows it, and if the view contains data that is configured to be editable on the present location, the top of a view will show the icon. Click to switch to edit mode, edit the data in the view and click **Save**.

A view with editable fields will show the icon

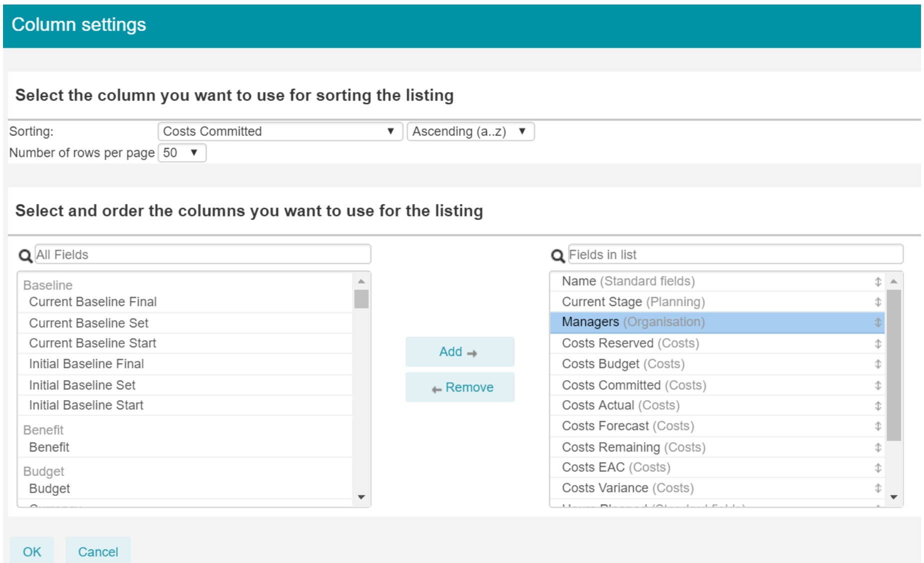
A view in edit mode will show which fields are editable by you

3.6.2 Create a View: set columns

A view can be changed or defined to suit your needs. This topic describes how you can define which data (columns) appear in your view, in which order they are shown, and with which sorting. You can also set the number of rows to display.

Create a view: set columns

Step 1. In a view, click **View**, then **Set Columns**, a pop-up appears:



Pop-up Column settings: the left side shows all available fields, the right side shows the fields in the view

Step 2. To add or remove a column in the view, select a field and click **Add** or **Remove**. You can also use drag and drop or you can double click a field to add or remove it. When looking for a specific field you can use the search box to find it more quickly.

Step 3. On the right side, in the **section Fields in list**, use drag and drop to change the sequence of the columns in the view.

Step 4. In the top of the pop-up you can add sorting to the view and define the number of rows per page. When the view is as you want it, click **OK**.
Note: to sort a view you can also click any column header.

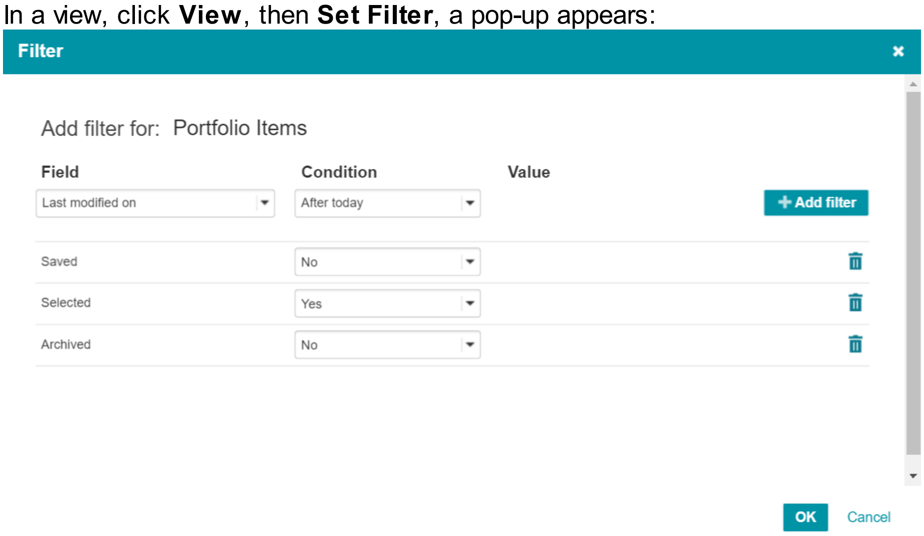
Step 5. The view appears on your screen with the name "**-- Custom view --**". You can save the view for re-use, see Save a view for re-use 27.

3.6.3 Create a View: set a filter

A view can be changed or defined to suit your needs. This topic describes how you can set a filter to define which rows appear in your view.

Create a view: set a filter

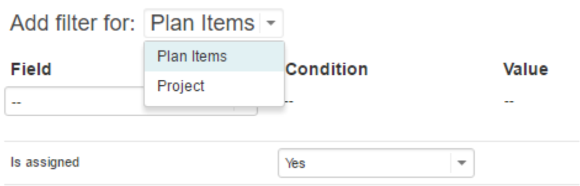
Step 1. In a view, click **View**, then **Set Filter**, a pop-up appears:



Pop-up Set filter

Step 2. To add a filter to the view, select a field, a condition and optionally a value, and click **Add filter**.

Step 3. To add a filter on a different object to the view, in the top of the pop-up click on the object name. From the drop-down list select the object you want use, then select a field, a condition and optionally a value, and click **Add filter**.



Adding a filter on another object to the view

Note: if no drop-down list appears it is not possible to set a filter on another object.

Step 4. To remove a filter from the view, click behind the filter.
Note: When a lock symbol is shown in front of a filter that specific filter cannot be removed.

Step 5. When you are done, click **OK**.

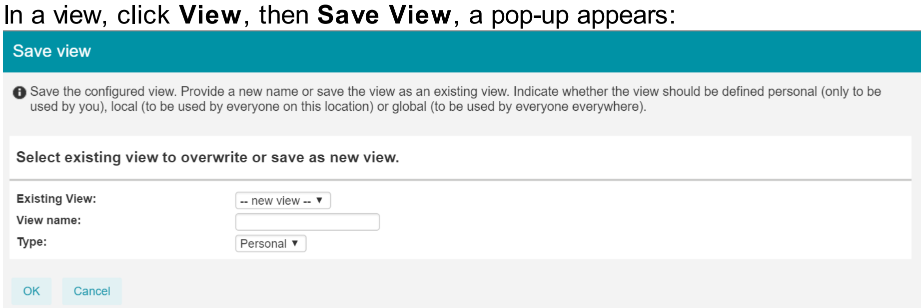
Step 6. The view appears on your screen with the name "**-- Custom view --**". You can save the view for re-use, see Save a view for re-use 27.

3.6.4 Save a View for re-use

You can change views to show the information you need. If you have created a view you want to re-use later, you can save it. A saved view appears in the drop-down list of available views.

Save a view for re-use

Step 1. In a view, click **View**, then **Save View**, a pop-up appears:



Pop-up Save View

Step 2. To replace an existing view, select the appropriate view from the drop-down list **Existing View**. If you want to save the view as a new view, enter a name in **View name**.

Step 3. Select the view type. Depending on your role you can choose between some or all of these types:

- Personal: saved view is visible only for the user who saved it
- Local: saved view is visible for everyone with a role at the location (e.g. the project) where the view is saved.
- Global: saved view is visible to all users everywhere (this option is only available for administrators)

Step 4. Click **OK** to save the view.

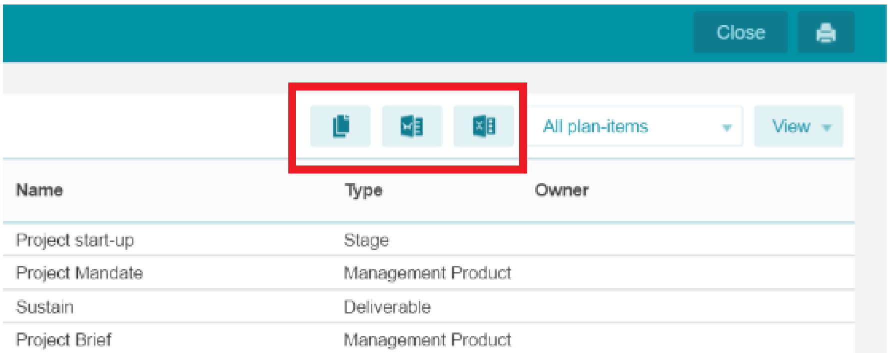
3.6.5 Quickly export a View to Excel, Word or Clipboard

Views can be used for on screen viewing, reporting and editing, but it is also possible to quickly export any view to Excel, Word or your Clipboard. Note that the quick export function is only available on the **tab Reports**.

Quickly export a view to Excel, Word or Clipboard

Step 1. Select or create the view you want to export.

Step 2. At the top of the view, click on of the buttons  to export the view to the clipboard, Excel or Word; exports to Excel and Word are downloaded to your computer.



Buttons for the quick export functions

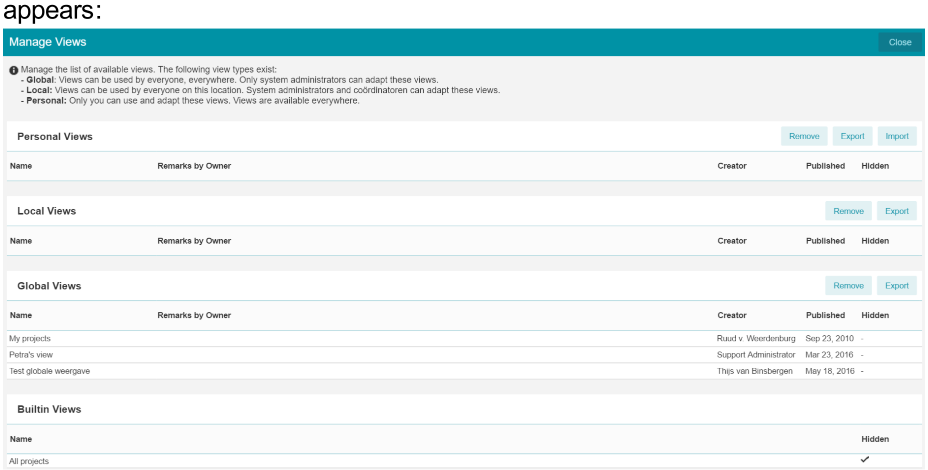
Step 3. Either paste the view form your clipboard, or open the downloaded Excel or Word file.
Note: rich text fields are exported as plain text.

3.6.6 Managing Views

Users and administrators can define views in various places in the Principal Toolbox (e.g. Home Page, Project, Log), and as different types (Personal, Local, Global). With the **Manage Views** option you can manage these views.

Managing views

Step 1. Navigate to a page with views, click **View**, then click **Manage Views**, a pop-up appears:



The pop-up Manage Views

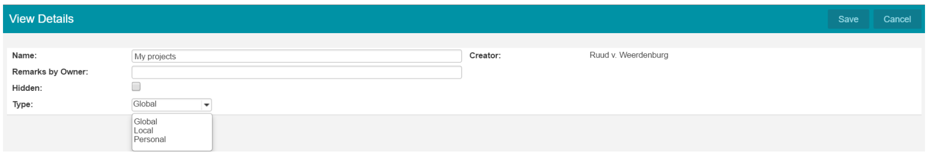
The pop-up Manage Views shows an overview of all available views on this location, grouped by type:

- Personal Views: only the creator (you) can use and adapt these views.
- Local Views: views visible for everyone with a role on 'this' location (where you clicked Manage Views); can be adapted by users with the role Administrators and Manager.

- Global Views: visible to all users everywhere; can be adapted only by administrators.
- Built-in Views: predefined views that can not be adapted

Step 2. In this pop-up select a view and click **Remove** to delete the view, or click **Export** to export it as a *.ptv file. You can also use this page for importing views. In the **section Personal Views** you can import a view by clicking Import and selecting the appropriate file. View can only be imported as personal view, but of course you can edit the properties of a view.

Step 3. To edit the properties of a view, click the **Name of the view**, a pop-up appears:

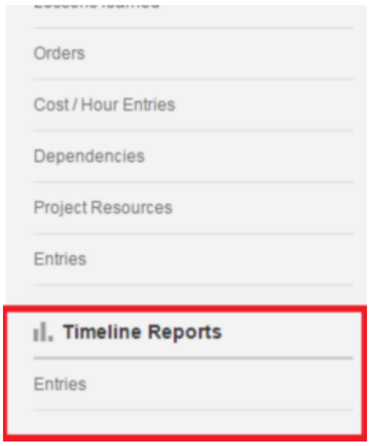


Pop-up View Details

Step 4. In the pop-up click to enter the edit mode. Now you can change the name and type of the view and you can hide it from the drop-down list. When you are done, click **Save**.
Note: typically views used in Automated Reports are hidden, in order to keep the drop-down list clean and usable.

3.6.7 Working with Timeline Reports

A Timeline Report is a (graphical) representation of information in relation to time and can be used to report on all types of entries. Timeline reports are based on timeline views. Timeline views work differently compared to normal views and function a bit like pivot tables known from Excel. Timeline reports can, for example, be used to compare your available resource capacity with your requested and allocated resource availability. It can also be used to compare the budget and actual costs within a project. Timeline views can be used on screen and in Automated Reports (see Creating an Automated Report in Excel 48). The **section Timeline Reports** can be found below the **section Reports** on **Dashboards** and/or the **tab Reports**.



The section Timeline Reports

Working with timeline views is in many ways exactly the same as working with views. The main difference is in how to define the view. For that purpose timeline views have a extra menu option: **Basic Settings**.

Create a timeline report

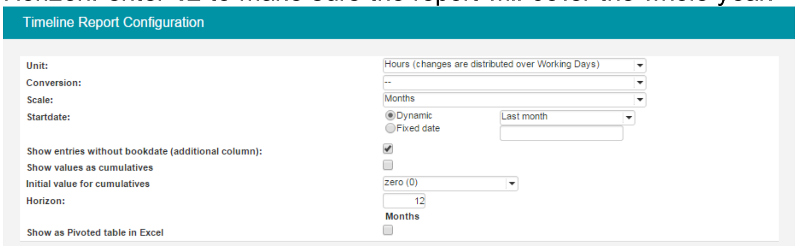
This example describes how to create a table with costs per product per month for this year within a project.

Step 1. Navigate to your project, to the **tab Reports**, to the **section Timeline Reports**, and click **Entries**, a pop-up appears

Step 2. In the pop-up click **View**, then click **Basic Settings**, the pop-up **Timeline Report Configuration** appears.

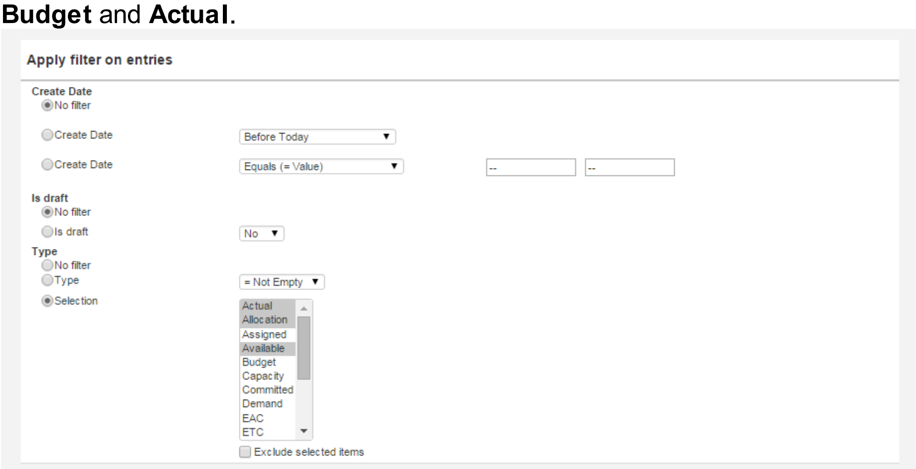
Step 3. First fill in the top section of the pop-up:

- Unit: select **Money (changes on book date)**.
- Scale: set scale to month to show the costs per month.
- Start date: select **This year** as a dynamic start date.
- Horizon: enter **12** to make sure the report will cover the whole year.



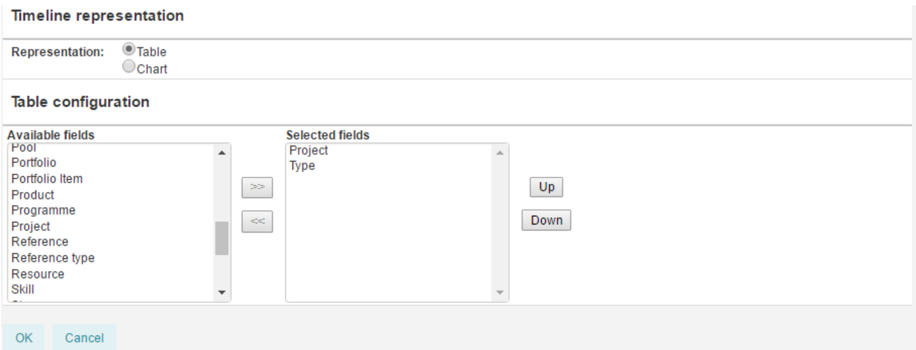
The pop-up Timeline Report Configuration, top section

Step 4. Next fill in the **section Apply filter on entries**: in the **filter Type**, select **Budget** and **Actual**.



The pop-up Timeline Report Configuration, section Apply filter on entries

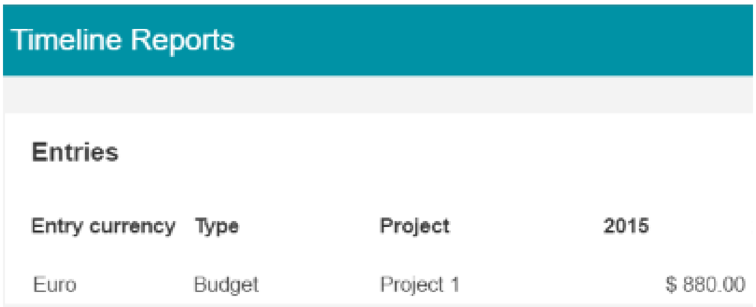
Step 5. Next fill the **section Timeline representation**: select the representation type **Table**, and in the **Table configuration** select the fields **Product** and **Type**.



The pop-up Timeline Report Configuration, section Timeline representation and Table configuration

Step 6. Finally click **OK** and view the result on your screen.

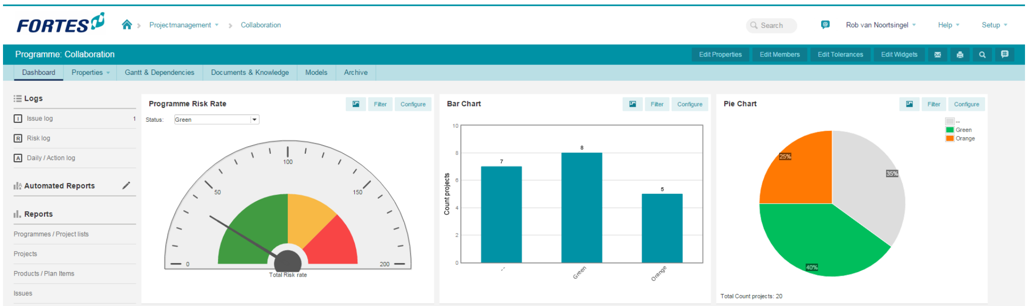
Note: If you work in a configuration with multi-currency, a timeline view will show results in the currency of the Organisational Unit where you use the view. In the screenshot below you can see that a budget in $ is shown in € in the timeline view.



3.7 Reporting: Working with Widgets

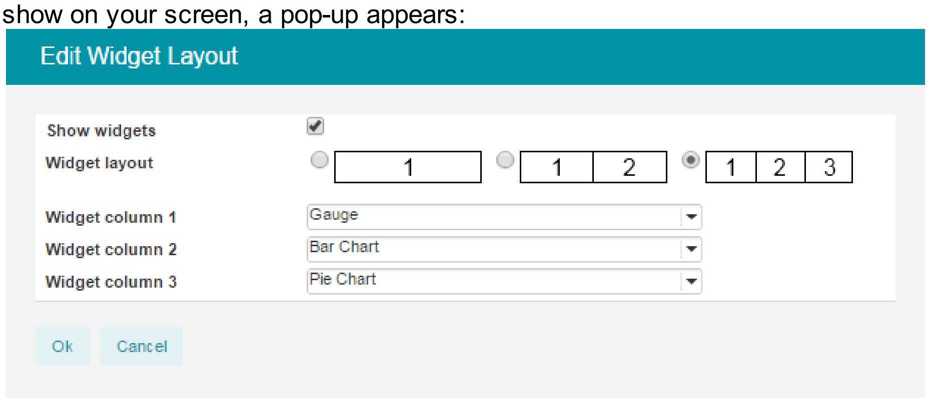
The Principal Toolbox supports a variety of ways to present data, ranging from on screen lists, to on screen visuals, to tailor made reports in Excel or Word.

Widgets are available in many locations in the Principal Toolbox and can be used to present data directly, without having to run a report or opening a view. Widgets are easy to configure and refresh 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

Making widgets available on your screen
On most locations where widgets are or can be made available, in the top bar you will see **Edit Widgets** (depending on your role).
Step 1. Click **Edit Widgets** to define how many and which type of widget you want to show on your screen, a pop-up appears:



Edit the widget lay-out

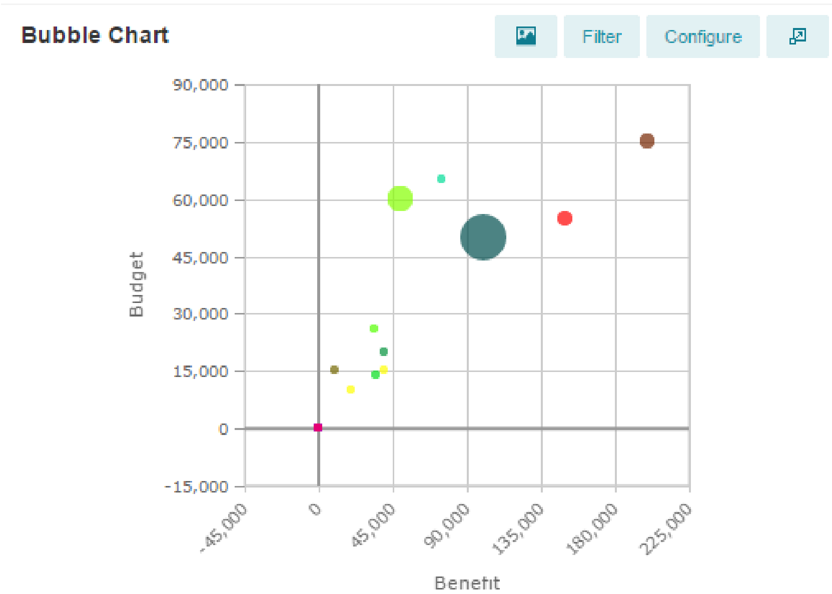
Step 2. Check **Show widgets** to hide or show widgets.
Step 3. At **Widget layout** select the number of widgets you want to show.
Step 4. For each widget, select the appropriate type and click **OK**, the widgets will now be displayed on your page.
Step 5. Next, configure each widget:
- Click **Configure** to configure the widget.
- Click **Filter** to set the filter to be used.

Note that these options differ per widget; see the next topics for an explanation per type of widget.

The next topics cover all widgets, their configuration and where they are available.

3.7.1 Bubble Chart

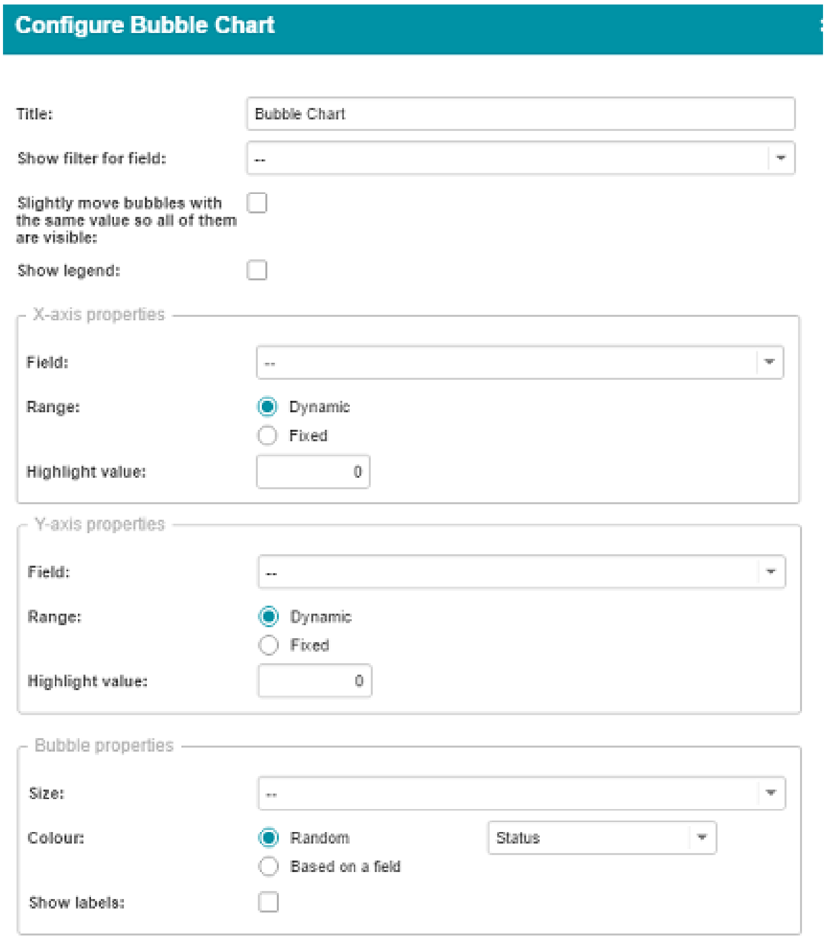
The bubble chart widget is available at programmes, folders and portfolios. It visualises projects weighted to different axes. Additionally, the size of the bubbles can be used for indication of impact.



The Bubble Chart widget

<u>Configuring the bubble chart</u>

1. Click **Configure**, a pop-up appears:



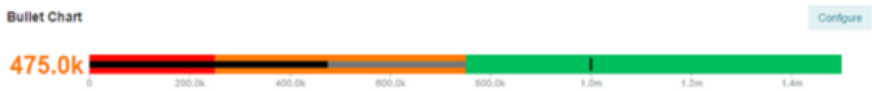
Dialogue Configure Bubble Chart

2. Enter the name of the chart.
3. Optionally, set a filter for a field. This field will be shown in the widget.
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.
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. Choose a field for the bubble size and set the bubble color to random, or to a specific field.
9. Click **OK** to save the configuration.

Note: When the chart does not show the appropriate values but shows the internal data values (often these are 1;2;3;4 etc.) this could be due to configuration of the used fields - please contact your administrator. Your administrator can fix this by changing the internal data values to text or by using a new field with a calculation that maps the data values back to text values. Fortes consultants can help with this calculation.

3.7.2 Bullet Chart

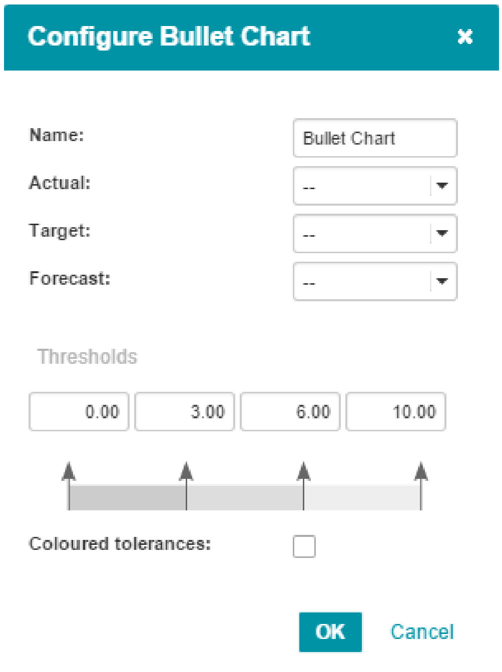
The Bullet chart widget is available at programmes and folders only. It compares a given quantitative measure against qualitative ranges and related markers.



Bullet chart widget

Configuring the bullet chart

1.Click **Configure**, a pop-up appears:

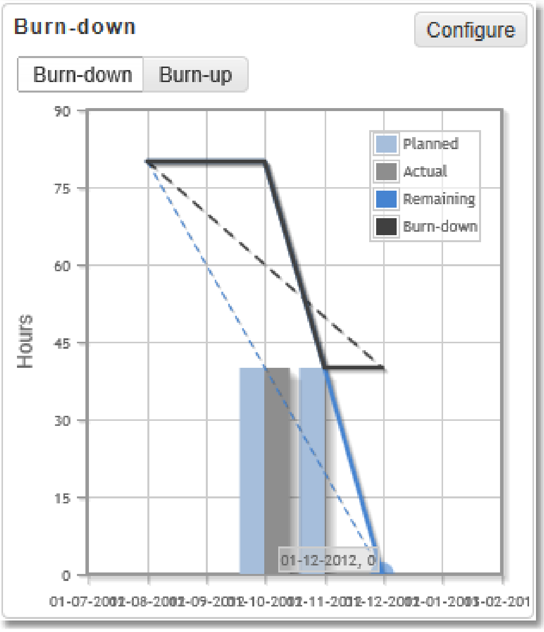


Dialogue Configure Bullet Chart

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

3.7.3 Burn-down Chart

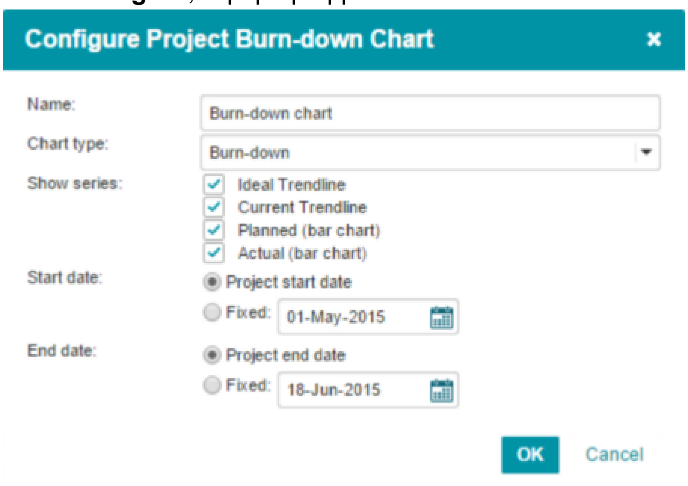
The Burn-down chart widget is available at project level only. It visualises planned versus actual hours within a configurable period to monitor project progress.



The Burn-down chart widget

<u>Configuring the burn-down chart</u>

1. Click **Configure**, a pop-up appears:

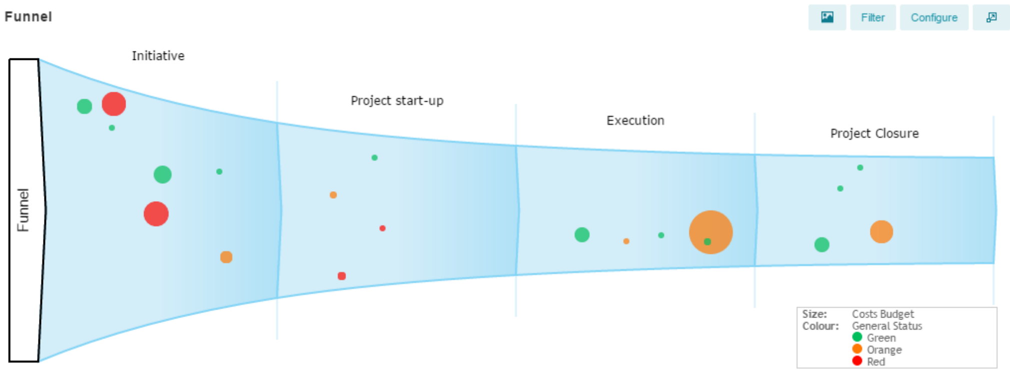


Dialogue Configure Project Burn-down Chart

2. Enter the name of the chart and choose the chart type: 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.

3.7.4 Funnel

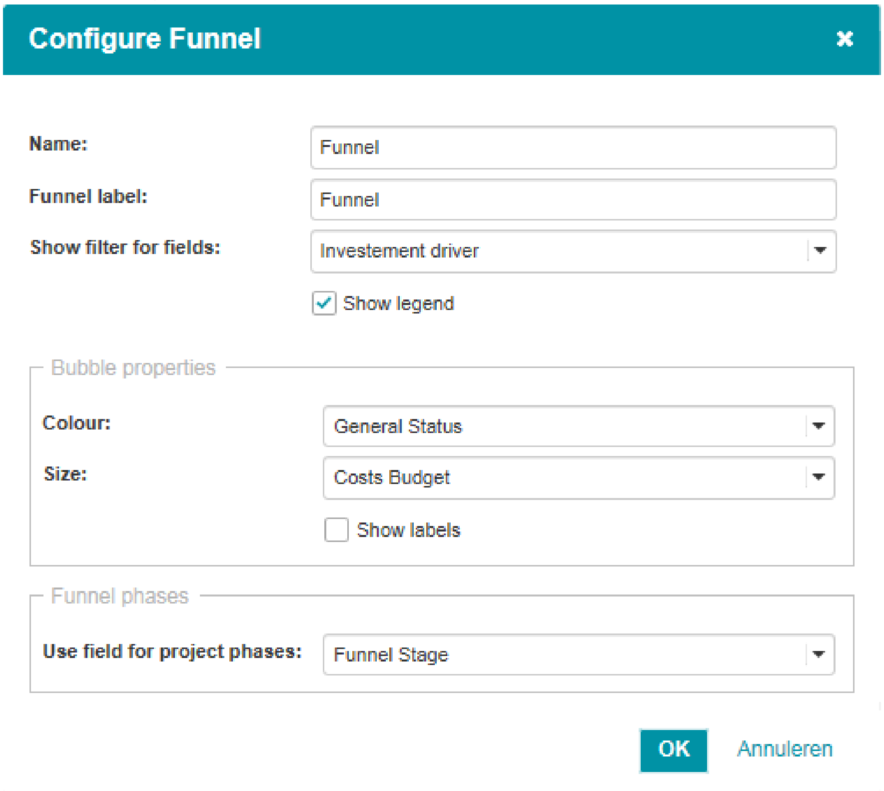
The funnel widget is available <u>on portfolio level only</u>. It visualises the projects (and initiatives) according to their current stages in the portfolio.



The funnel widget

<u>Configuring the funnel widget</u>

1. Click **Configure**, a pop-up appears:

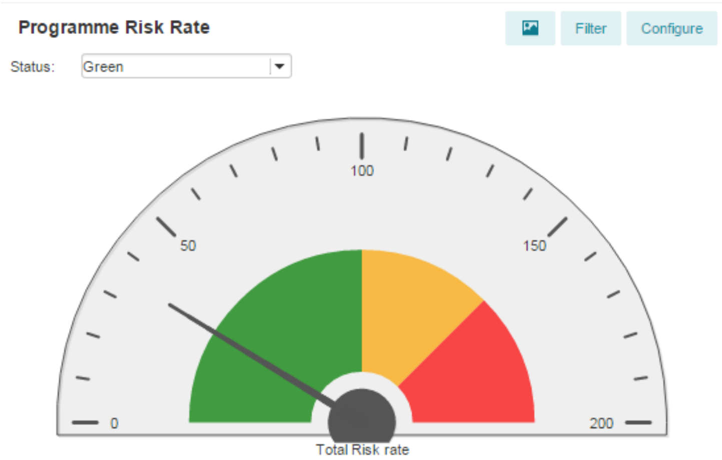


Dialogue Configure Funnel

2. Enter the name and the label for the widget.
3. Optionally, select the field(s) used for filtering and enable the legend.
4. Set the Bubble properties by selecting a field for the colour and size representation.
5. Set the field used for the project phase representation.
6. Click **OK** to save the configuration.

3.7.5 Gauge Meter

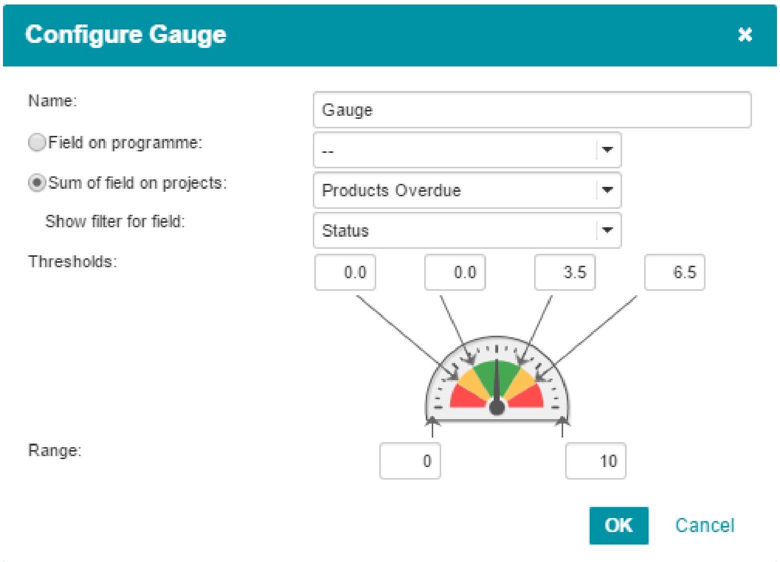
The Gauge Meter widget is available at programmes, folders and portfolios. It visualises a single value against a conditional meter indication (green, amber, red).



The Gauge Meter widget

<u>Configuring the gauge meter</u>

1. Click **Configure**, a pop-up appears:

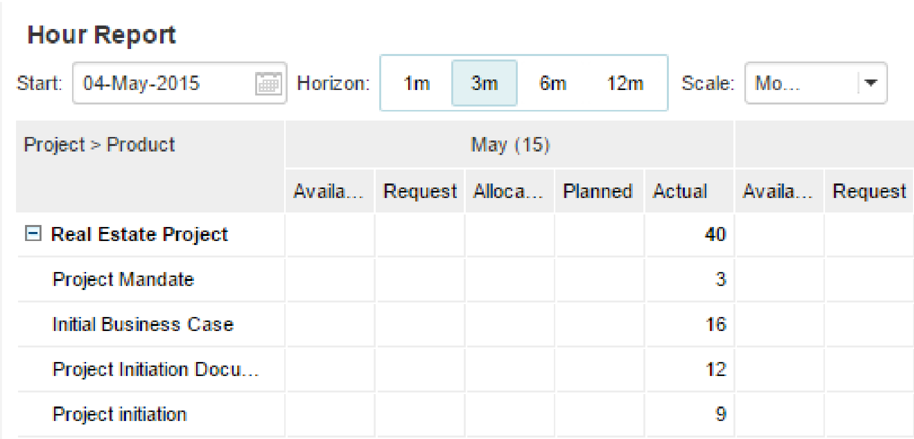


Dialogue Configure Gauge

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.

3.7.6 Hour Report

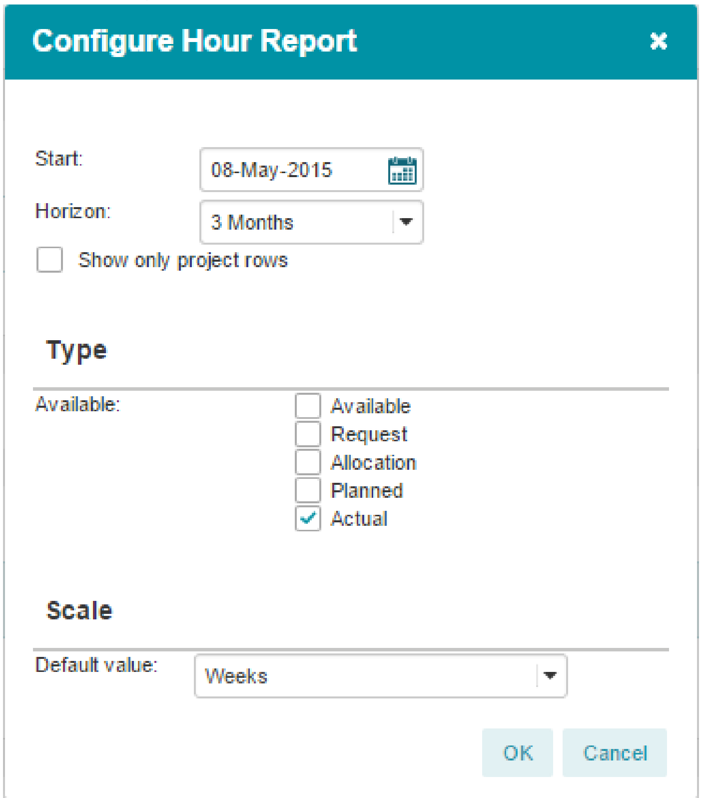
The Hour Report widget is available at the Home Page and within time registration groups. It visualises information of a resource such availability, planning and allocation in time.



The Hour Report widget

Configuring the personal hours widget

1. Click **Configure**, a pop-up appears:

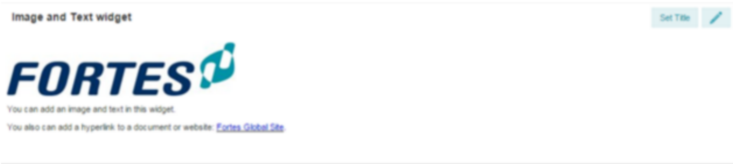


Dialogue Configure Hour Report

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 hour types to show: Available, Request, Allocation, Planned and/or Actual.
6. Set the scale default value; Days, Weeks or Months.
7. Click **OK** to save the configuration.

3.7.7 Image and Text

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



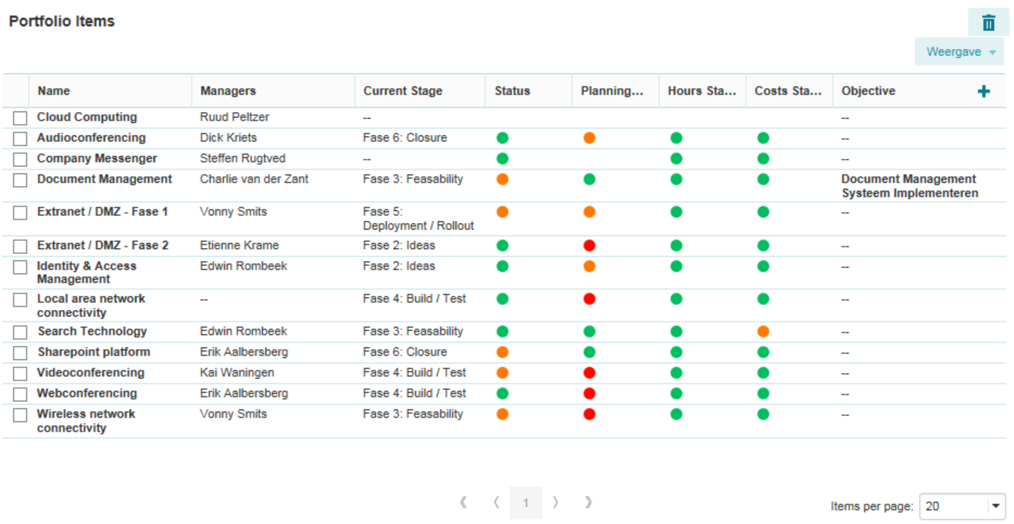
The Image and Text widget

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 enter a rich text editor in which you can enter text, images and hyperlinks.
3.Click **Save** to save the widget.

3.7.8 List

The List widget is available in portfolios and custom dashboards on the **tabs Dashboard** and **Dashboard Report**. It works very much like working with views.



Portfolio Items

Weergave

Name	Managers	Current Stage	Status	Planning...	Hours Sta...	Costs Sta...	Objective
Cloud Computing	Ruud Peltzer	--					--
Audioconferencing	Dick Kriets	Fase 6: Closure					--
Company Messenger	Steffen Rugtved	--					--
Document Management	Charlie van der Zant	Fase 3: Feasability					Document Management Systeem Implementeren
Extranet / DMZ - Fase 1	Vonny Smits	Fase 5: Deployment / Rollout					--
Extranet / DMZ - Fase 2	Etienne Krame	Fase 2: Ideas					--
Identity & Access Management	Edwin Rombeek	Fase 2: Ideas					--
Local area network connectivity	--	Fase 4: Build / Test					--
Search Technology	Edwin Rombeek	Fase 3: Feasability					--
Sharepoint platform	Erik Aalbersberg	Fase 6: Closure					--
Videoconferencing	Kai Waningen	Fase 4: Build / Test					--
Webconferencing	Erik Aalbersberg	Fase 4: Build / Test					--
Wireless network connectivity	Vonny Smits	Fase 3: Feasability					--

1

Items per page: 20

The List widget

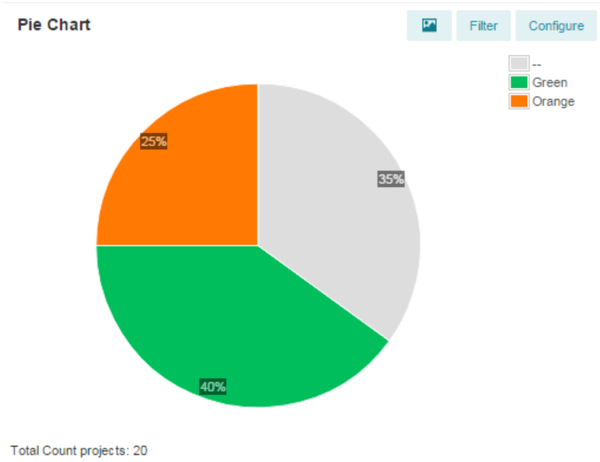
Configuring the List widget

Note: Before the widget can be configured, the item type you select must have one of it's views marked as 'default' (see: Reporting: Working with Views 23). The List widget will always open with the default view of the item type; if no view is marked default, the List widget will not show any data.

1. Click **Select item type** and select the item type you want to use, a list appears in the widget.
2. Click **View**, then click **Filter** to set filters on which rows to show.
3. Click to add columns to the view.
4. To remove a column from the view, right click the column header and click **Remove Column**.
5. Drag and drop columns to change their order and their width.

3.7.9 Pie Chart

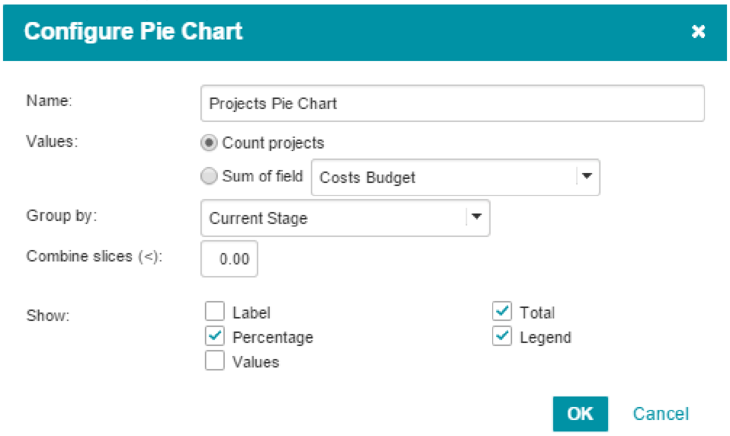
The Pie Chart widget is available at programmes, folders and portfolios. It visualises project values grouped by different options in pie layout.



The Pie Chart widget

<u>Configuring the pie chart widget</u>

1. Click **Configure**, a pop-up appears:

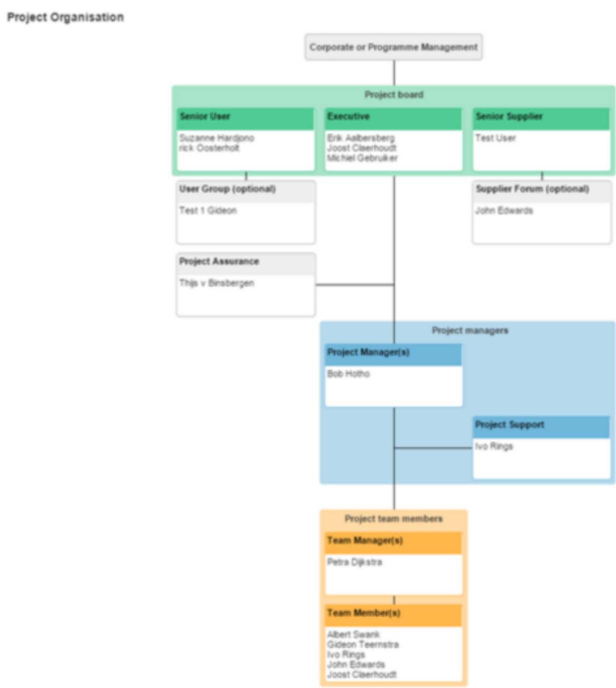


Dialogue Configure Pie Chart

2. Enter the name of the chart.
3. Set the values: either count the projects or sum 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 to shown in the Pie Chart: Label, Percentage, Values, Total and/or Legend.
7. Click **OK** to save the configuration.

3.7.10 PRINCE2 Organisation

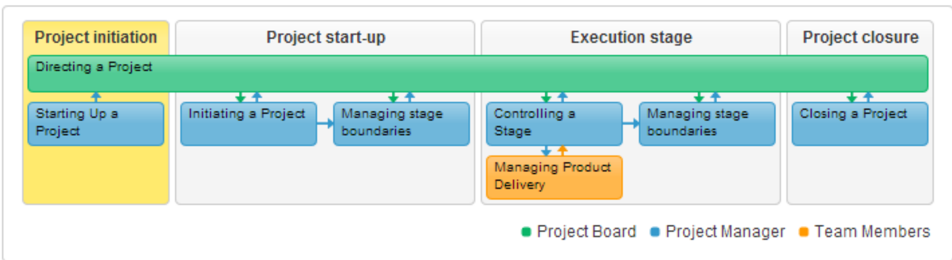
The PRINCE2 Organisation widget is available <u>at project level only</u>. It visualises the project organisation by showing which users have which role on the project. The widget is automatically configured.



The PRINCE2 Organisation widget

3.7.11 PRINCE2 Process Diagram

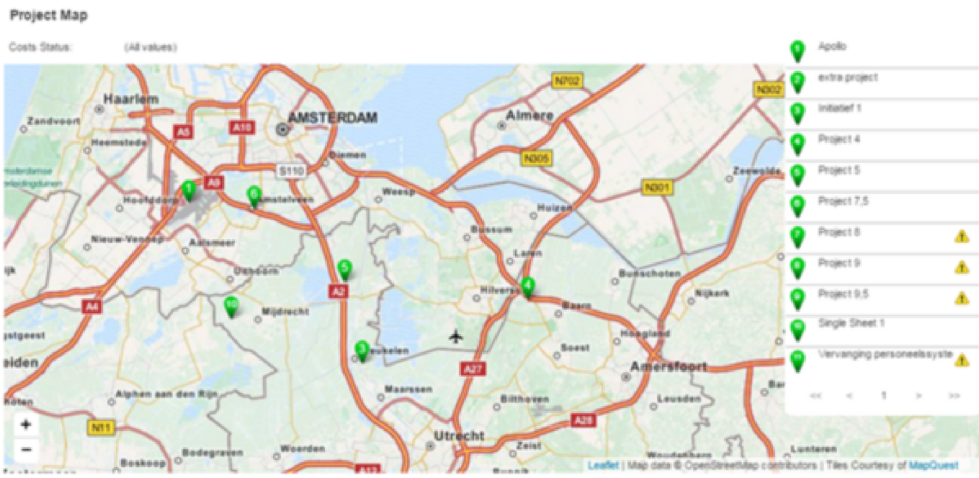
The PRINCE2 Process Diagram widget is available at project level only. It visualises the project life cycle, the stages and the current stage of the project. The widget is automatically configured.



The PRINCE2 process diagram widget

3.7.12 Project Map (Geo)

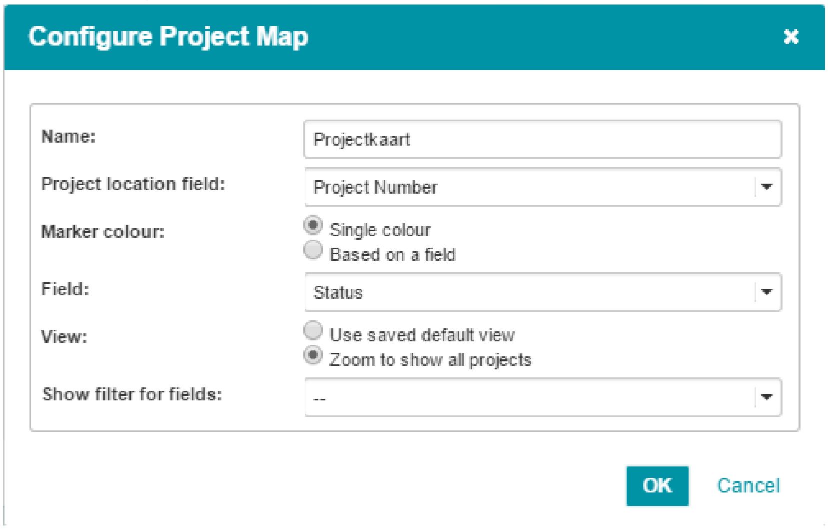
The Project Map (Geo) widget is available at programmes and folders only. It shows projects on a map based on their GPS location. The GPS location can also be added by dragging project markers to the map.



The Project Map widget

<u>Configuring the Project map (Geo) widget</u>

1. Click **Configure**, a pop-up appears.



Dialogue Configure Project Map

2. Set the name of the Project Map.
3. Select the project location field.
   Note: ask your administrator which field to use!
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: use a saved default view or zoom to show all projects.
7. Optionally select fields to be available as filters in the widget.
8. Click **OK** to save the configuration.

3.7.13 Risk Matrix

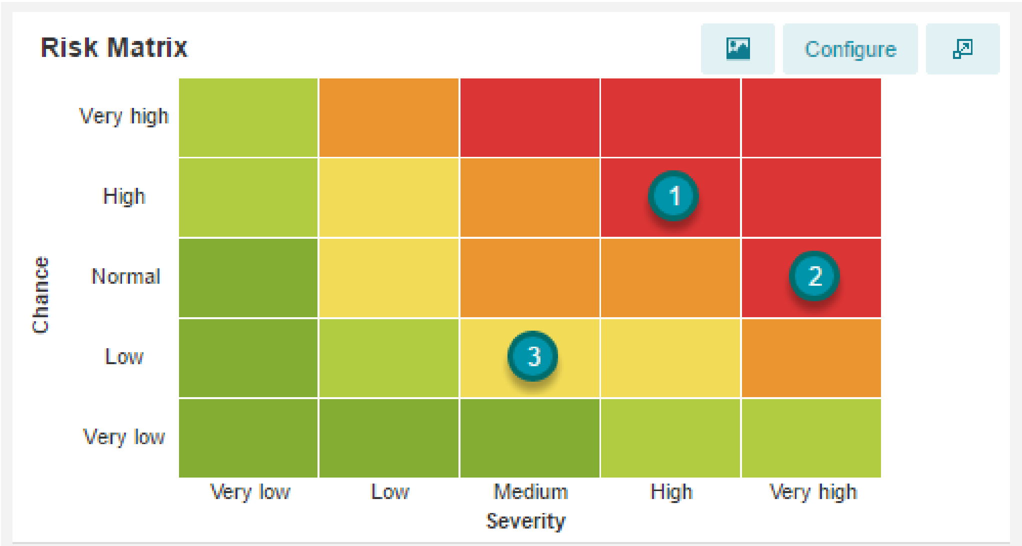
The Risk Matrix widget visualises risks in respect to their chance and severity. This widget is available on the projects, programmes and folders, and on risk logs.

<u>Configuring the risk matrix</u>

1. In the widget click on **Configure**, a pop-up appears.
2. In the pop-up enter values for:
   - which field to use for the X-axis and Y-axis

- which theme to apply (classic or modern)
- the thresholds to be used for the colours in the widget

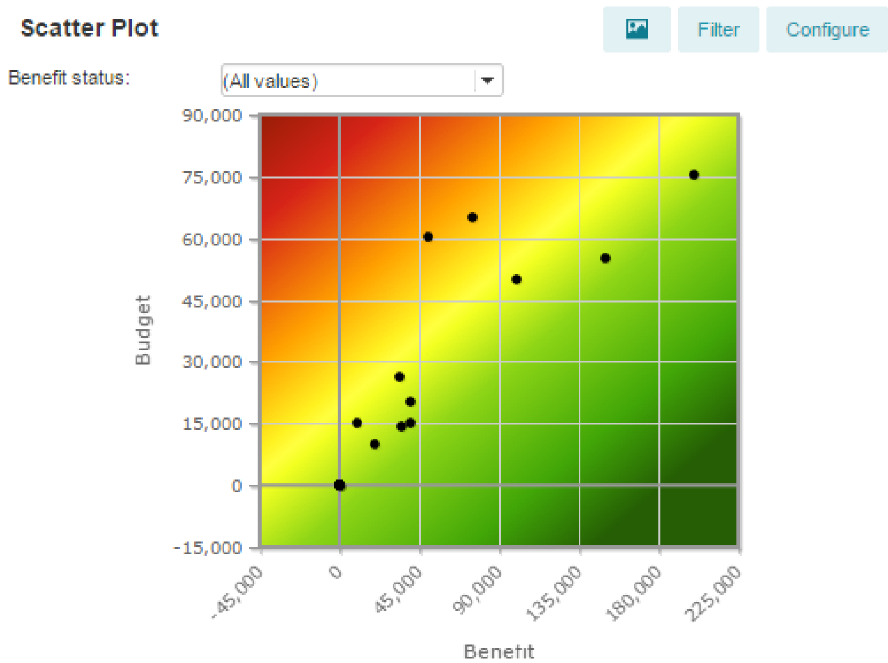
3. Click **OK**.



The Risk Matrix widget, using the fields Change and Severity for the axis and using the classic theme.

3.7.14 Scatter Plot

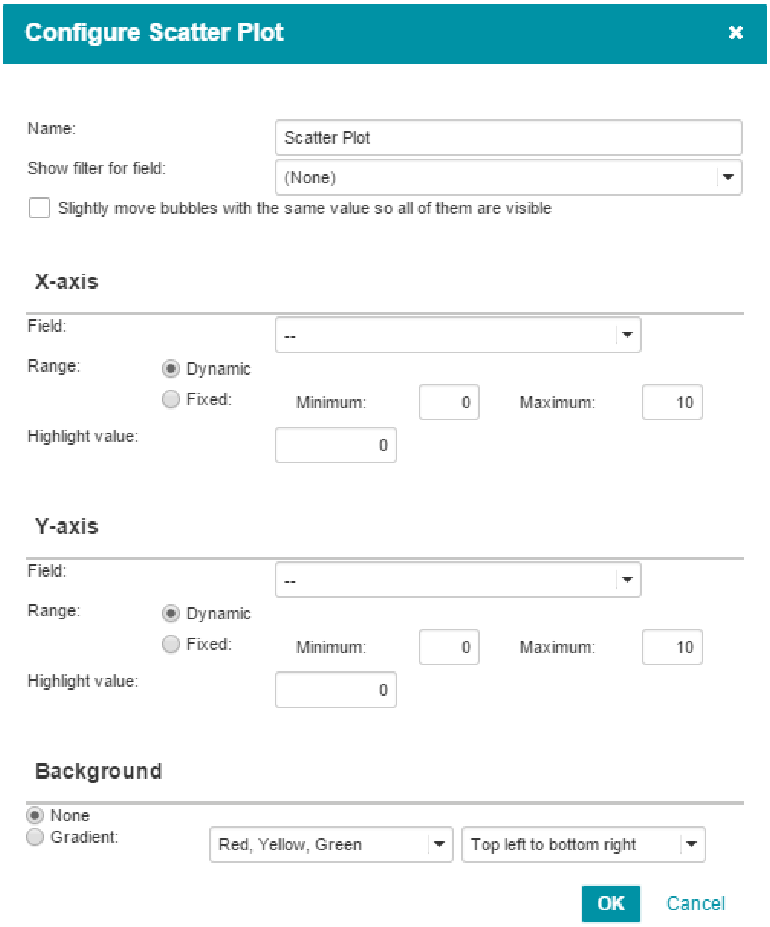
The Scatter Plot widget is available at programmes, folders and portfolios. It visualises projects weighted to different axes. An indication of good/bad can be shown using different colour gradients.



The Scatter Plot widget

<u>Configuring the scatter plot</u>

1.Click **Configure**, a pop-up appears:



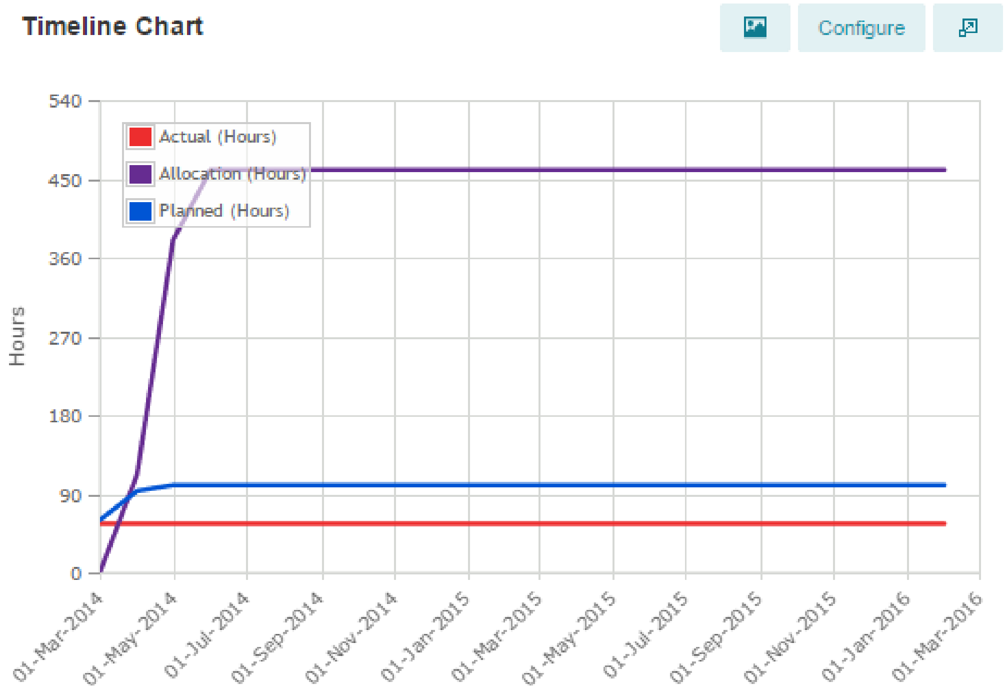
Dialogue Configure Scatter Plot

2. Enter the name of the chart.
3. Optionally, select field to be shown as a filter option on the widget.
4. Choose whether or not bubbles with the same value should be slightly moved so all of them are visible.
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.

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

3.7.15 Timeline Chart

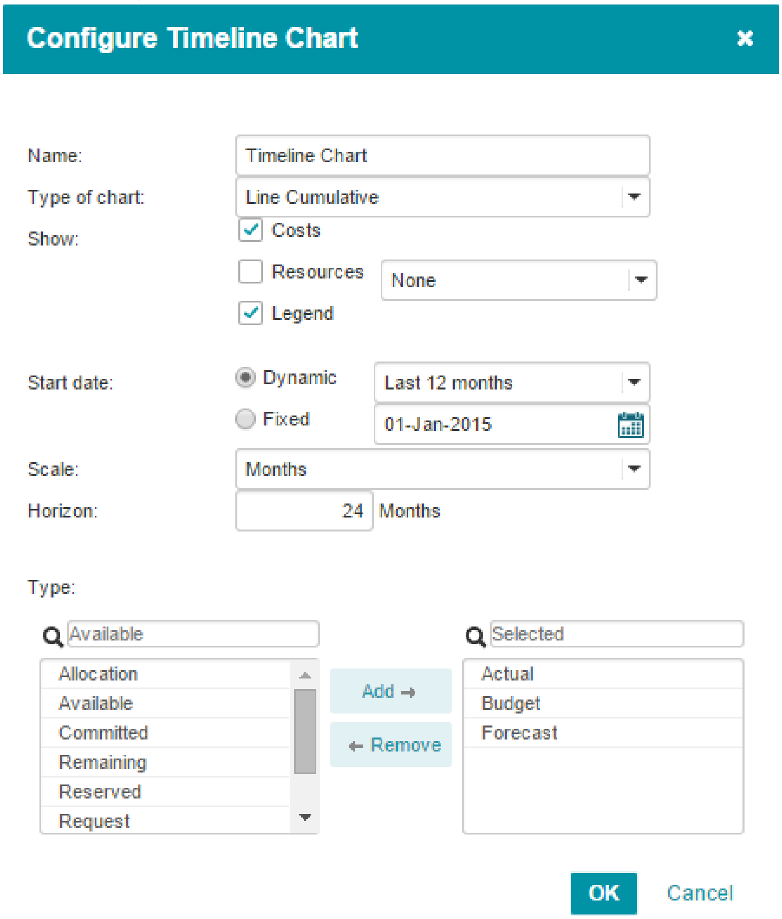
The Timeline Charts widget is available at projects, programmes, folders and portfolios. It visualises timeline information on costs and/or hours for selected types such as budget, actual, etc.



The Timeline Chart widget

Configuring Timeline charts

1. Click **Configure**, a pop-up appears.

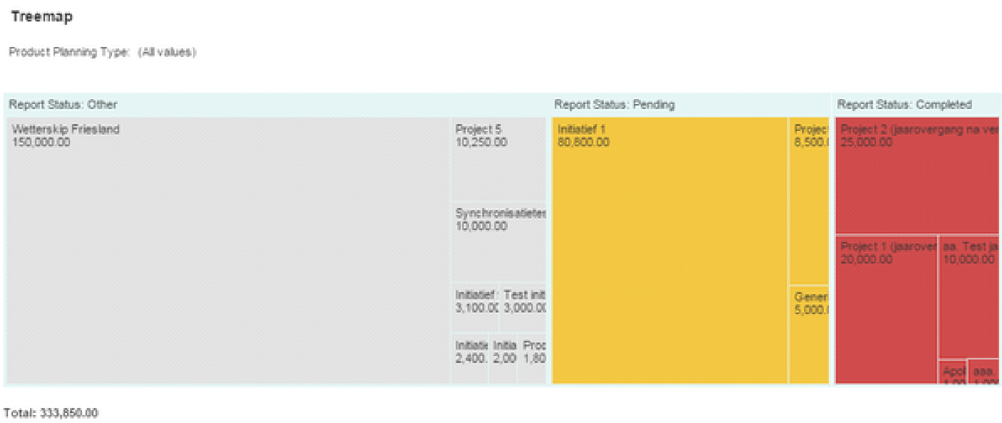


Dialogue Configure Timeline Chart

2. Enter the name of the chart and choose the chart type: Bar, Bar Cumulative, Line or Line Cumulative.
3. Set Costs, Resources and Legend to be shown.
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.

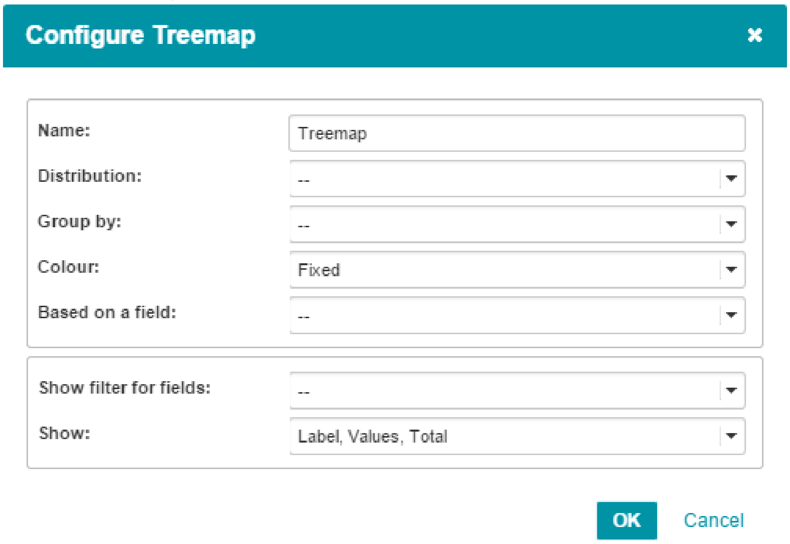
3.7.16 Treemap

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



The Treemap widget

<u>Configuring the Treemap widget</u>
1. Click **Configure**, a pop-up appears:



Dialogue Configure Treemap

2. Set the name of the Treemap.
3. Select the field to distribute the Treemap by (e.g. Budget, Actual, KPI-score, etc.).
4. Select the field to group the Treemap by (e.g. Strategic Goal, Business Unit, Status, etc.).
5. Select the colours of the Treemap: 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 select a field to be shown in the widget as a field to filter on.
8. Choose what should be shown in the Treemap: Label, Values, Total, etc.
9. Click **OK** to save the configuration.

3.8 Reporting: Working with Automated reports

The Principal Toolbox supports a variety of ways to present data, ranging from on screen lists, to on screen visuals, to tailor made reports in Excel or Word.

You can use Automated Reports to generate standard reports containing Principal Toolbox data. Depending on your role you can also create new Automated Reports. You can find the available Automated Reports in the **section Automated Reports**, on the **tab Dashboard** and on the tab **Reports**.

The section Automated Reports

3.8.1 Generating an Automated Report

<u>Generating an Automated Report</u>
You can generate reports and documents from the Principal Toolbox. Available reports are shown in the **section Automated Reports** which can be found on the **tab Dashboard** and the **tab Reporting**. A green icon indicates an Excel report, a blue icon represents a Word report.

Step 1. Navigate to the **section Automated Reports**, click on the **name of the report** you want to generate. Depending on your browser a dialogue box appears or the report is downloaded.
Note: In order to work correctly, Excel reports <u>must always be saved to disk</u> before opening them.
Step 2. Open the report and allow macros: the report is now filled with data from the Principal Toolbox.
Step 3. Save the report to disk or upload it to Principal Toolbox.

The section Automated Reports

Note: From Excel you can also generate a Powerpoint (PPT) report. To do this, go to the tab PTB in Excel and click "Create presentation". Each sheet in Excel becomes a slide in the presentation. The name of the sheet becomes the title of the slide. Set print areas in the Excel sheets by going to the "Page Layout" tab. If you have hidden rows or columns in the tab, hide all columns and rows between the print area and hidden columns/tabs as well.

3.8.2 Creating an Automated Report in Excel

On creating an Automated Report in the Principal Toolbox
Depending on your role you can create Automated Reports in the Principal Toolbox. Before you build the report, please consider the following questions:

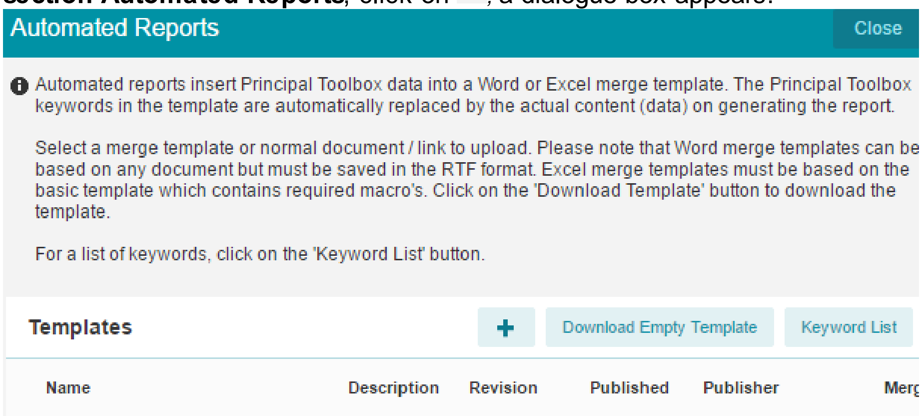
- What is the purpose of the report?
- Who will use the report and what decisions should be made with the report?
- Where in Principal Toolbox should the report should be placed? Is it a portfolio report, a project report, a report for a resource pool, and so on. The answer to this question determines on which location you should start.
- What is the content of the report? What information do you need from Principal Toolbox?
- On which objects does the data exist?

Creating an Automated Report in Excel
This is the most commonly used type of Automated Report. The reason for this is that Excel has a lot of features to edit and display the data from Principal Toolbox.

Step 1. Understand the report to build: which data from the Principal Toolbox is needed?

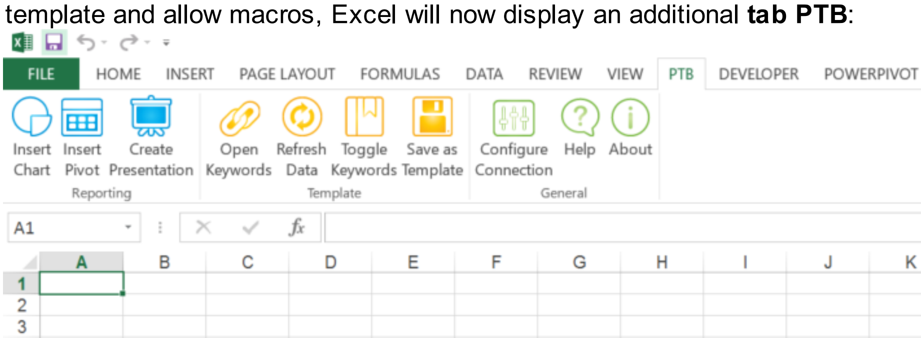
Step 2. In the Principal Toolbox, define the views required for the report. See Working with views 23.
Note: in Automated Reports you can only use views made in the **section Reports**; you cannot use views made in **Dashboards**.
Note: start the name of views with "AR" to indicate that a view is used for an Automated Report; this as a signal that these views should not be changed.

Step 3. Navigate to the location where you want to create the report, navigate to the **section Automated Reports**, click on ✎, a dialogue box appears:



Dialogue box Edit Automated Reports

Step 4. In the dialogue box, click **Download Empty Template**, open the Excel template and allow macros, Excel will now display an additional **tab PTB**:



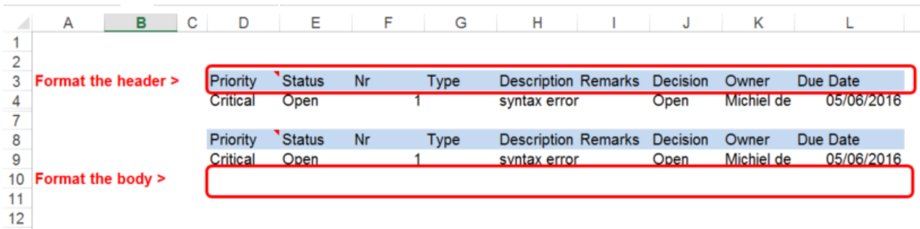
Extra tab PTB in the Excel template

Step 5. Next, add Principal Toolbox fields and views to the Excel template:

- In the **Excel tab PTB** click **Open Keywords**, a new tab with keywords opens in your web browser. Or: In the **section Automated Reports** click , a dialogue box appears, click **Keyword List**, a dialogue box with keywords appears.
  Note: the keywords screen has two tabs: one for fields and one for views.
- Click on a keyword and drag it to Excel. Or: use your right mouse button to copy and paste.
  Note: a field appears as a cell, a view appears as a table with a header.

Step 6. Format the fields and tables in Excel and format the report:

- Fields: can be formatted directly.
- Table headers: can be formatted directly.
- Table body: can only be formatted in the first empty row below the table.

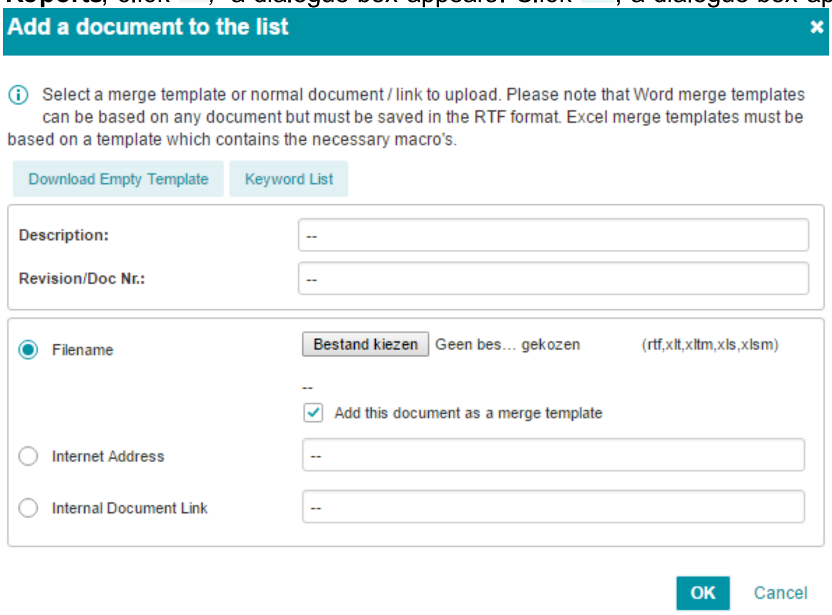


Difference between formatting the table header and formatting the table body

Note: in the **Excel tab PTB** you can click **Refresh Data** to check whether the body formatting is applied correctly to the entire table.

Step 7. When the automated report is ready, in the **Excel tab PTB** click **Save as Template**, a dialogue box appears. Enter the dialogue box and click **OK** to save the Automated Report.

Step 8. Finally, upload the Automated report in Principal Toolbox. Navigate to the location where you want to add the report, navigate to the **section Automated Reports**, click , a dialogue box appears. Click , a dialogue box appears:



Dialogue Add an Automated Report

Step 9. Click Choose File to select the saved report, enter the **Description** (this will be the display name of the report), make sure that the box **Add this document as a merge template** is checked, and click **OK**. The Automated Report is now ready for use.

Creating an Automated Report in Excel: on using Excel functions

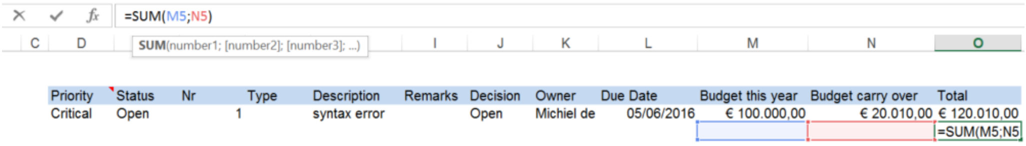
In Excel you can perform all kinds of operations on the data from Principal Toolbox. Below you find a few examples and some considerations when working with tables.

Add a formula in a row

Step 1. Add a new column before or behind the columns in the view. In the example below the column **Total** is added - it is not part of the view.

Step 2. Place the formula in the new column in the first empty row below the table.

Step 3. Click **Refresh Data** to apply the formula to the entire table.



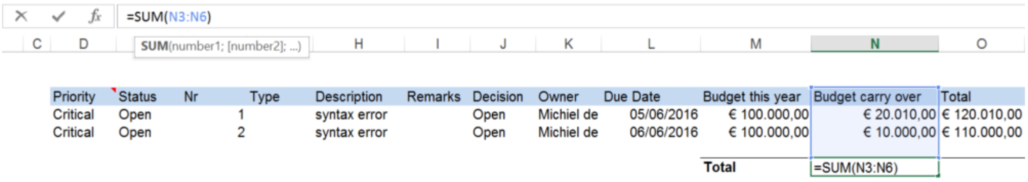
Priority	Status	Nr	Type	Description	Remarks	Decision	Owner	Due Date	Budget this year	Budget carry over	Total
Critical	Open		1	syntax error		Open	Michiel de	05/06/2016	€ 100.000,00	€ 20.010,00	€ 120.010,00
											=SUM(M5;N5

Applying a formula in the first empty row under the view

Add a formula to a column

Step 1. Place the formula in the row below the first empty row below the table.

Step 2. Please note that the formula must also include the table header in order to work correctly!



Priority	Status	Nr	Type	Description	Remarks	Decision	Owner	Due Date	Budget this year	Budget carry over	Total
Critical	Open		1	syntax error		Open	Michiel de	05/06/2016	€ 100.000,00	€ 20.010,00	€ 120.010,00
Critical	Open		2	syntax error		Open	Michiel de	06/06/2016	€ 100.000,00	€ 10.000,00	€ 110.000,00
									Total	=SUM(N3:N6)	

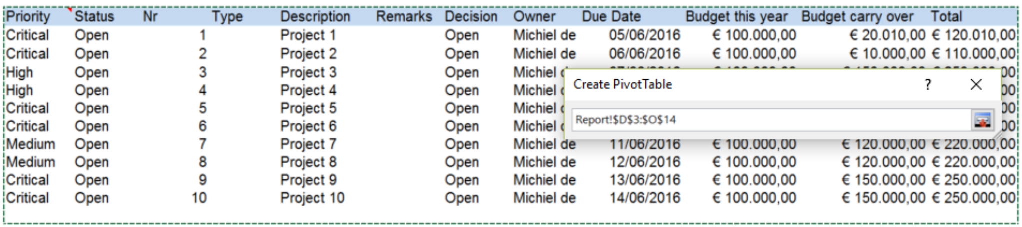
Applying a formula to a column: the formula must also include the table header

Using conditional formatting in views/tables

Using conditional formatting on views/tables works the same as applying regular formatting on tables: add the conditional formatting in the first empty line below the table. Click **Refresh data** to check the conditional formatting on the entire table.

Using pivot tables

When using pivot tables make sure to include the first empty row below the table in the range!



Priority	Status	Nr	Type	Description	Remarks	Decision	Owner	Due Date	Budget this year	Budget carry over	Total
Critical	Open		1	Project 1		Open	Michiel de	05/06/2016	€ 100.000,00	€ 20.010,00	€ 120.010,00
Critical	Open		2	Project 2		Open	Michiel de	06/06/2016	€ 100.000,00	€ 10.000,00	€ 110.000,00
High	Open		3	Project 3		Open	Michiel [illegible]	[illegible]	[illegible]	[illegible]	[illegible]
High	Open		4	Project 4		Open	Michiel [illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Critical	Open		5	Project 5		Open	Michiel [illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Critical	Open		6	Project 6		Open	Michiel [illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Medium	Open		7	Project 7		Open	Michiel de	11/06/2016	€ 100.000,00	€ 120.000,00	€ 220.000,00
Medium	Open		8	Project 8		Open	Michiel de	12/06/2016	€ 100.000,00	€ 120.000,00	€ 220.000,00
Critical	Open		9	Project 9		Open	Michiel de	13/06/2016	€ 100.000,00	€ 150.000,00	€ 250.000,00
Critical	Open		10	Project 10		Open	Michiel de	14/06/2016	€ 100.000,00	€ 150.000,00	€ 250.000,00

Selecting the range for a Pivot Table: always include the header and the first empty row below the table

Working with Rich Text fields from the Principal Toolbox

Principal Toolbox supports custom fields of the type **Rich Text (Memo field with additional formatting)**. When you use such fields in Automated Reports in Excel, not all formatting is transferred:

- Bold, italic, underline, font colour, font size and line breaks are maintained.
  Note: Shift-enter (line break) and Enter (paragraph) both show as a line break.
- All bullet lists are shown as '-'

* Background colour and horizontal lines are not maintained.

Note: When creating the template you have to set the value of ParseRTF to true in File > Info > Advanced properties > Custom. Unfortunately this does not work for already existing reports.
Note: In Automatic Excel Reports you must apply Wrap Text to the appropriate cell for the formatting to be maintained. If not, all formatting is lost.

3.8.3 Creating an Automated Report in Word

On creating an Automated Report in the Principal Toolbox
Depending on your role you can create Automated Reports in the Principal Toolbox. Before you build the report, please consider the following questions:

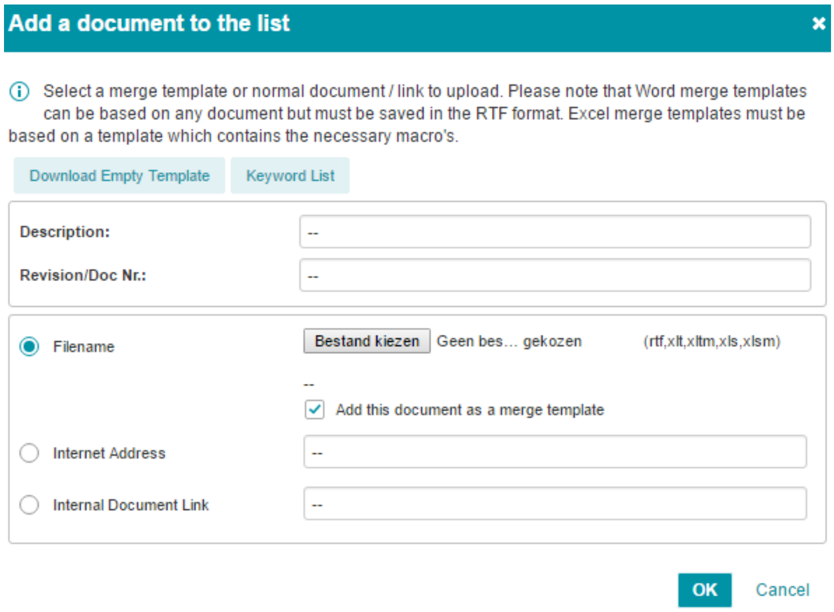
* What is the purpose of the report?
* Who will use the report and what decisions should be made with the report?
* Where in Principal Toolbox should the report should be placed? Is it a portfolio report, a project report, a report for a resource pool, and so on. The answer to this question determines on which location you should start.
* What is the content of the report? What information do you need from Principal Toolbox?
* On which objects does the data exist?

Creating an Automated Report in Word
This type of report is best used for documents where data from Principal Toolbox can be shown ‘as is’. In other words: you can show data from Principal Toolbox, but you can hardly edit it in Word.

General steps
Step 1. Understand the report to build: which data from Principal Toolbox is needed?
Step 2. In the Principal Toolbox, define the views required for the report. See Working with views 23.
Note: in Automated Reports you can only use views made in the **section Reports**; you cannot use views made in **Dashboards**.
Note: start the name of views with "AR" to indicate that a view is used for an Automated Report; this as a signal that these views should not be changed.
Step 3. Open a blank Microsoft Word document.
Step 4. Next, add Principal Toolbox fields and views to the Word document:

* Navigate to the location where you want to create the report. In the **section Automated Reports** click , a dialogue box appears, click **Keyword List**, a dialogue box with keywords appears.
  Note: the keywords screen has two tabs: one for fields and one for views.
* Click on a keyword and drag it to Word. Or: use your right mouse button to copy and paste.
  Note: a field appears as text, a view appears as a table with a header.

Step 5. Format the fields and tables in Word and format the report.
Note: in tables you can only add character formatting (font/size/..).
Step 6. When the automated report is ready, save it as .RTF
Step 7. Finally, upload the Automated report in Principal Toolbox. Navigate to the location where you want to add the report, navigate to the **section Automated Reports**, click , a dialogue box appears. Click , a dialogue box appears:



Dialogue Add an Automated Report

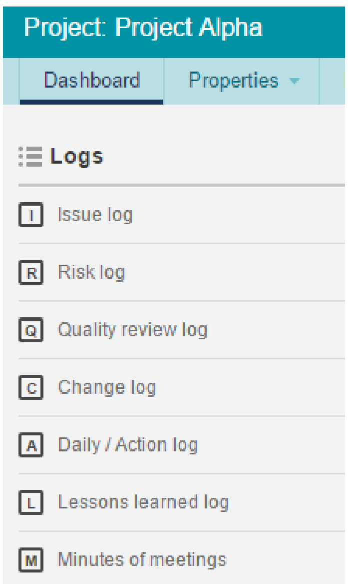
Step 8. Click **Choose File** to select the saved report, enter the **Description** (this will be the display name of the report), make sure that the box **Add this document as a merge template** is checked, and click **OK**. The Automated Report is now ready for use.

<u>Working with Rich Text fields from the Principal Toolbox</u>

Principal Toolbox supports custom fields of the type **Rich Text (Memo field with additional formatting)**. When you use such fields in Automated Reports in Word, hardly any formatting is transferred. All formatting disappears apart from the line endings. Also Word inserts sections, leading to many blank lines.

3.9 Working with Logs

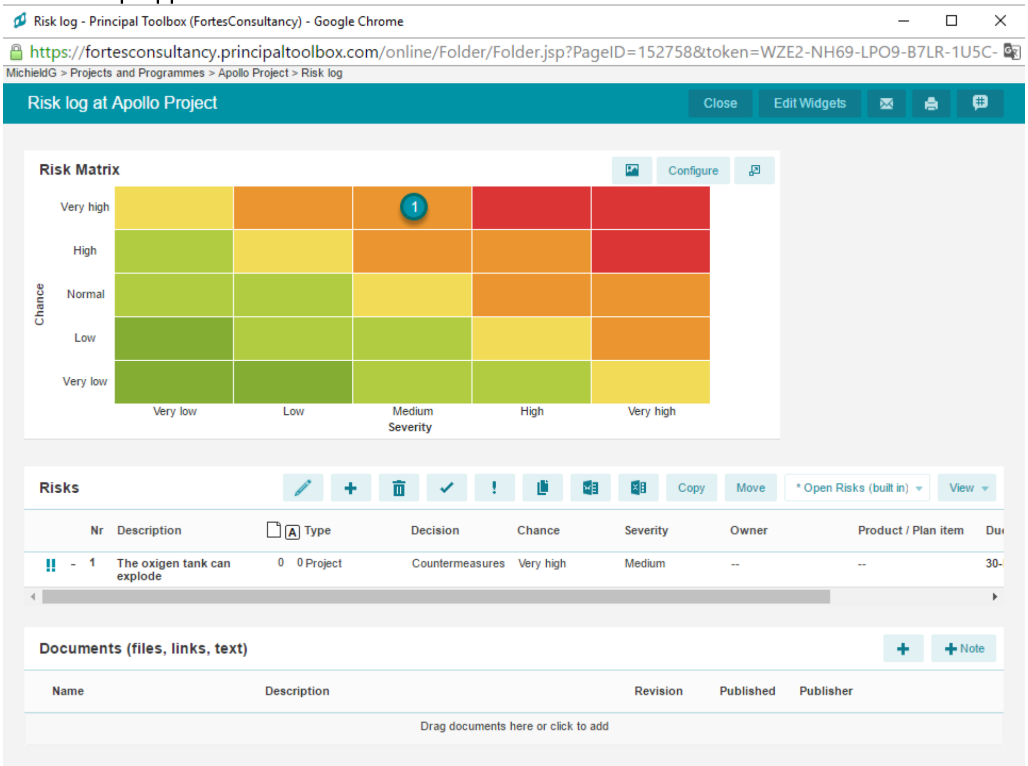
In the Principal Toolbox you can work with Logs in Projects, Programmes and Folders.



Log section in the Principal Toolbox

Create a log-item (issue, risk, etc.): in a log

Step 1. In the **tab Dashboard**, in the section Logs, click on the appropriate log, a pop-up appears



Example of a Risk Log

Step 2. Click on ✚ to create a new log item. Click on the ✎ button.

Step 3. Fill in the fields in the view and click **Save**

Create a log-item (issue, risk, etc.): from a plan-item

You can create log items in two ways:

1. Add a product to a log item by filling in the **field Product/plan item**.
2. Via the details page of a plan-item: click the **tab Logs** and create a new log item.
   Note: the log item will now be related to the plan-item.

Manage a log item (issue, risk, etc.)

Step 1. Go to your homepage or to the log.

Step 2. Click on the log item and click ✎.

Step 3. Edit the log item. You can enter data in the available fields and add documents.

Step 4. You can add actions in the section **Actions**.

Step 5. You can close a log item by changing the status to **Closed**.

Step 6. Save changes by clicking **Save**.

3.10 Creating items

Depending on the location, the role you have in the PTB and settings in the PTB, items can be easily created. This can be new projects, folders or programs just to name a few. Depending on the item you want to create, a dialogue box appears with possibilities to determine the name, owner etc. Input possibilities vary for different items.

Creating a Organisational Unit

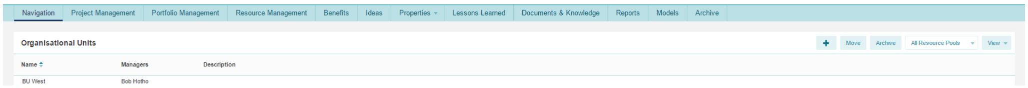
In an **Organisational Unit** you can create more Organisational Units.

Step 1. Go to the tab **Navigation**

Step 2. Click the + button

Step 3. Fill in the required fields

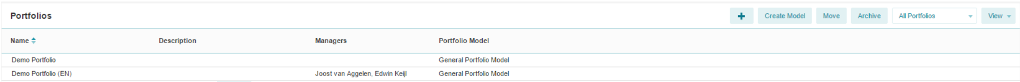
Note: If you can't see the navigation tab you can select it in the tab **Properties** and then click the button **Configuration**



Organisational Units

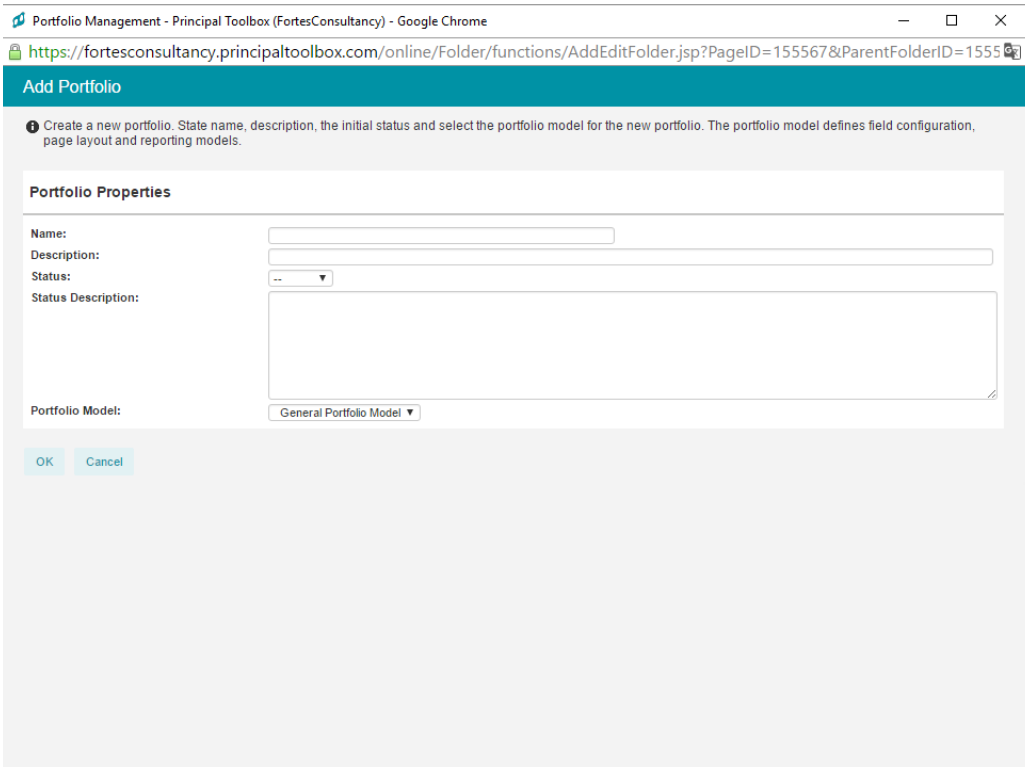
Creating a Portfolio

Within Portfolio Management you can add Portfolios. Note: This can only be done by System management and Portfolio Managers.



Step 1. Click the + button

Step 2. Fill in the required fields



Dialogue box for adding a portfolio

Creating a Portfolio-item

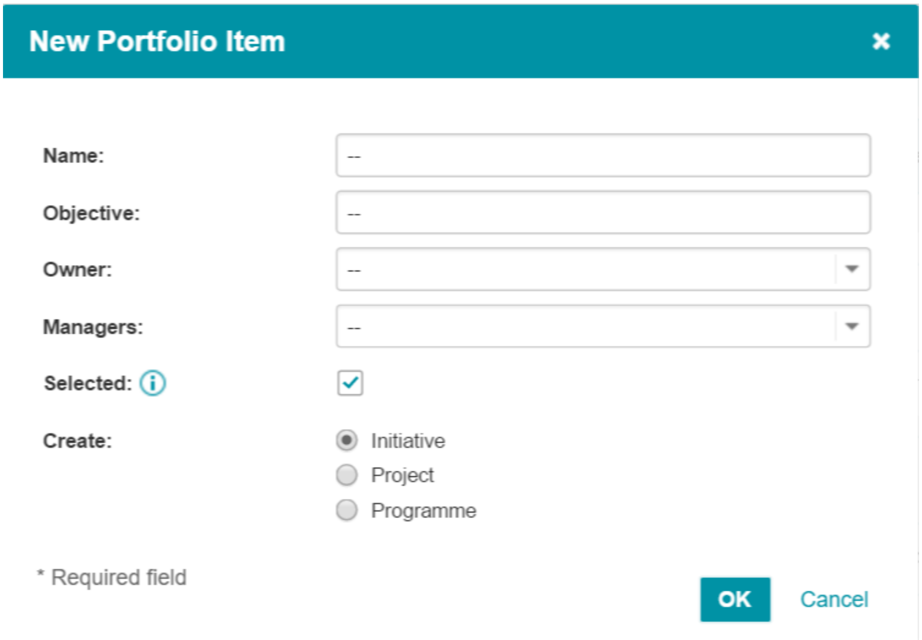
Within a Portfolio you can add portfolio items. This can be Initiatives, Programmes and Projects.

Step 1. Click the + button

Step 2. Fill in the required fields

Note: the **Owner** of a Portfolio Item can be used if you want someone to change only this portfolio-item instead of giving him a role for changing all portfolio-items within a

portfolio.
Note: **Selected** is a field used in **Scenario Planning.** You can leave the check mark as it is.



This dialogue box appears when you want to create a new portfolio item

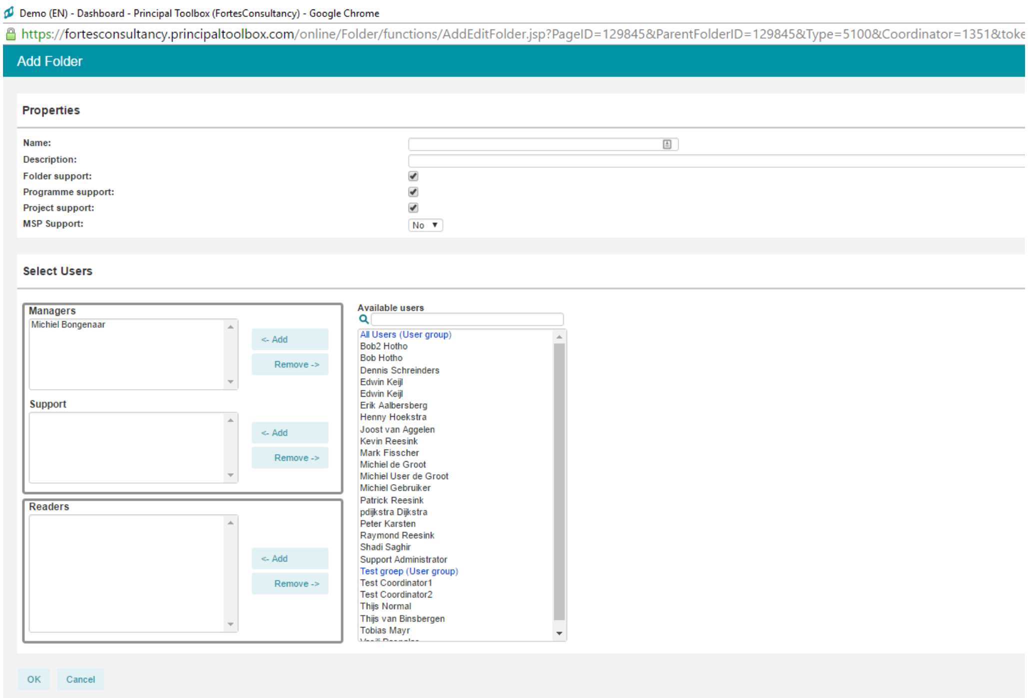
Creating a Folder

Within Project management you can add folders to group your projects/programmes.

Step 1. Go to the button in Project Management

Step 2. Fill in the required fields. Select the Folder/Programme/Project fields if you want the folder to contain Folders/Programmes/Projects

Note: the 'MSP Support' function is an old function in the PTB. If you do not work with this module you can leave it as 'no'.



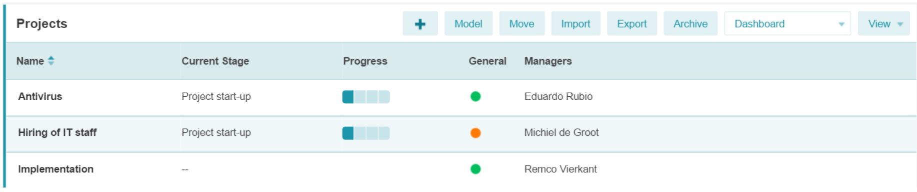
Adding a folder

3.11 Moving items

PTB gives a lot of flexibility when it comes to moving items. These items can be f.e. project, folders, portfolios, portfolio items of entire organisational units. The move function can be found throughout PTB and is located in the header of dashboards.

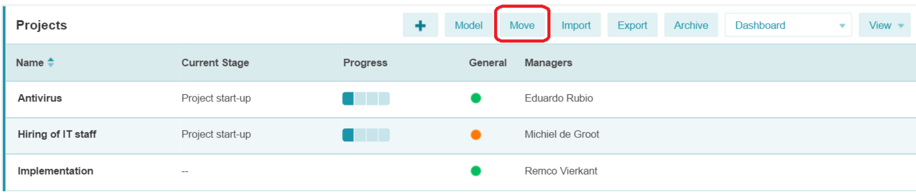
To move an item, follow these steps:

Step 1. Navigate to the desired dashboard and select the line of the respective item you want to move.



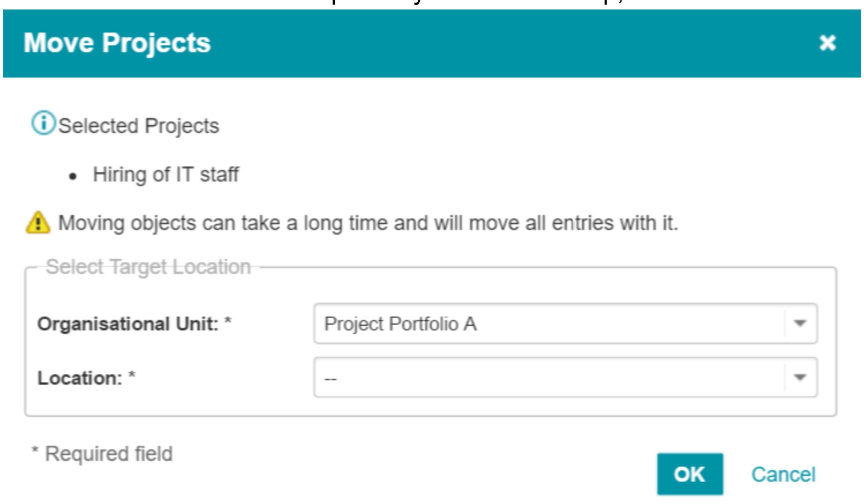
'Hiring of IT staff' is selected (highlighted in blue)

Step 2. When the line is selected, click **Move**, and a pop-up appears.



The Move button located on the top of dashboards

Step 3. Select the correct OU and optionally the correct map, click **OK**.



The target location for moving object can be set

Note: all related data (such as entries and log items) are moved as well.

3.12 Working with roles

This topics contains information on types of users, on assigning roles, and also contains an overview of all roles and rights.

Two types of users

The Principal Toolbox allows for two types of users:

1. Administrators, who get access to everything everywhere. Administrator rights can only be granted in the user administration (only accessible by other administrators).
2. Users, who get access to entities and areas within the Principal Toolbox by assigning them roles.

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

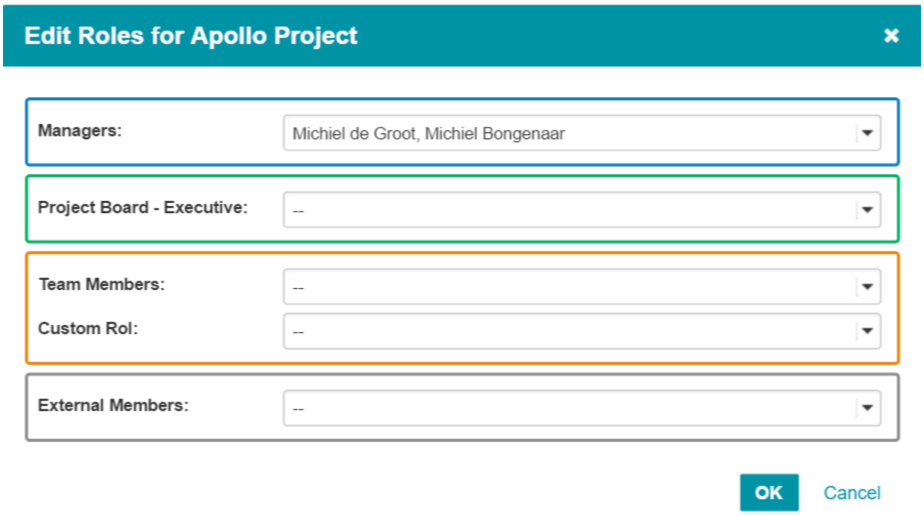
Roles can be defined on Organisational unit level, each functional module and entities within the modules such as portfolio's, projects and plan items. As an administrator it is important to realize that you not only have access to everything, but also that you can see everything in the system such as tabs, projects etc. This is not a valid representation of what the average user is experiencing when he is using PTB, only the item to which the user is assigned will be visible. To be aware of this difference, you could switch between admin and user accounts to see what's the difference.

How to assign roles

Roles can be set on various locations in PTB. For example in a project.

Step 1. Click **Edit Roles** on the right in the dark header.

Step 2. Select the right users for the right roles.



The dialogue box for setting roles on a project.

Step 3. Click **OK**.

Note: Select user group ‘All Users’ to make all users member of the OU.

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.

Note: When a role is assigned to a user, they will see the item to which the role applies on their homepage (i.e. project or program)

Permissions per role: an overview
The tables below give an overview of all roles and their rights.

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 •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

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 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 Portfolios

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 Items

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

Roles within Custom 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 - Blue box	•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 - Green box (Executive, Senior User, Senior Supplier)	•Read all information within a project •Add issues to the issue log
Team members - Orange box	•Read all information within a project, except project costs information. •Add issues to the issue log
External members - Grey box	Note: The availability of this role is dependent on your configuration and can only be assigned to external users. External users are users that are from outside the organization. The external member cannot view the project but can only: •Become owner of products (assigned by other roles) •Write hours (time entry) on the project

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
Benefit Management Coordinators	•Creating, editing and removing benefits •Editing the benefits map •Editing benefit lay-out
Benefit Management Reader	•Reader access to all benefits and benefits map

3.13 Document management

Within the Principal Toolbox you can store documents at various locations. Principal Toolbox will keep the document in the database, so it will be available to all users with access to the document in the Principal Toolbox. It is possible to overwrite older versions with newer ones. Old versions will be kept in storage, so it's always possible to check out the document history and open an older version of the document.
Also, it is possible add an approval cycle on deliverables and/or documents. Documents can easily be added to products, projects, folders and organisational units.

Most important elements of document management in PTB:

- Adding a document 62
- Update or delete a document 64
- Request document approval 64
- Working with document folders 65
- Working with Notes 66

3.13.1 Adding a document

In multiple places you can add documents, links and notes, for example on the details page, in logs and on the **tab Documents**.

Adding a document (in general)

Step 1. Navigate to a place where you can add Documents, e.g. the **tab Documents** or a **Plan-item Page**.

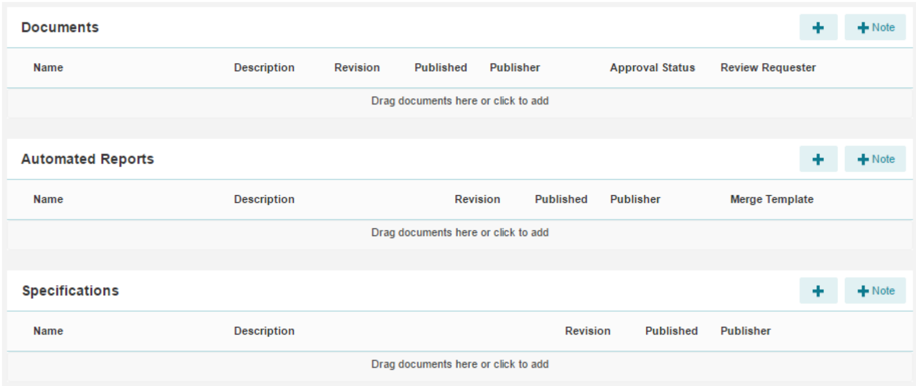
Step 2. In the section, click + to add documents or links, or click or + Note to add notes.
Note: you can also use drag-and-drop to add documents.

Step 3. To add a new version of a document: select the row of the appropriate document and click **Edit**. Enter the data in the pop-up screen and select the new version through **Choose file**. Next click **OK**.

Step 4. To access earlier versions of a document: select the row of the appropriate document and click **Show History**.

Example: adding a document to a Plan-item Page

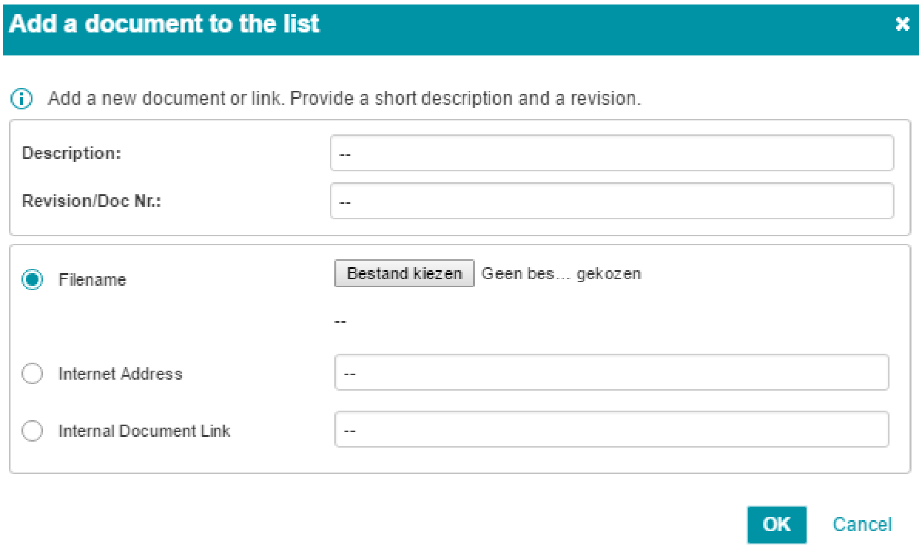
Step 1. Navigate to a Plan-item Page, on the bottom of the page you see three sections:



A plan-item page, the three document sections

Note: the **section Documents** can be used to add (documents describing) the deliverable.
Note: the **section Automated Reports** can contain Automated Reports containing project/plan-item information.
Note: the **section Specifications** can be used to add documents that specify the product to deliver.

Step 2. In the appropriate section, click + to add a document or a link, a dialogue box appears:



Dialogue add a Document

- To add a document, enter a description and a version number, then click **Choose File** to select the appropriate file, then click **OK**.
- To add a link, enter a description and the link address, then click **OK**.
- To add a link to a centrally placed document, e.g. an Automated Report, enter the document ID in the Internal Document Link, then click **OK**.
  Note: ask your administrator for support.
  Note: hyperlinks have the following syntax: "http://intranet.organisation.com/documents/example.doc", or "file://p:

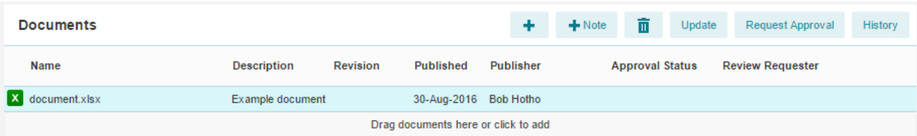
\documents\example.doc".

3.13.2 Update or delete a document

After adding a document you can download it, update it or delete it.

Update or delete a document

Step 1. Navigate to the document you want to update or delete:



Step 2. Select the row of the appropriate document, and click **Update** to add a new version, or click to delete the document. Enter the pop-up box and click **OK**.

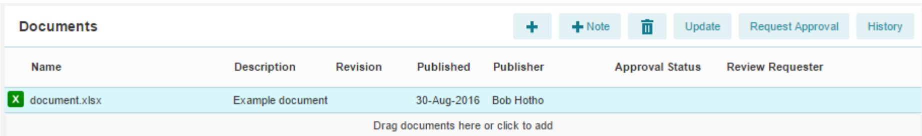
Step 3. If you click **History** a pop-up appears displaying all previous versions of the document.

3.13.3 Request document approval

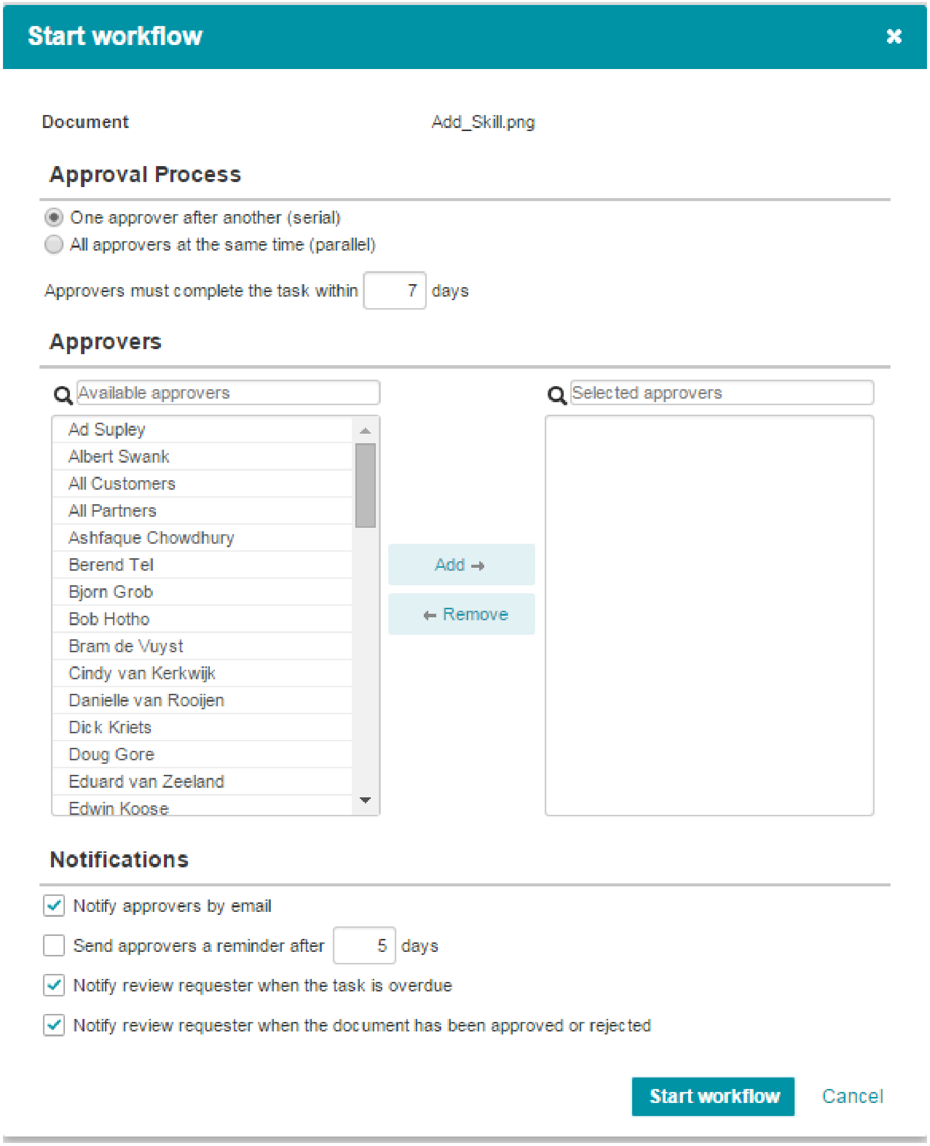
For any document in the Principal Toolbox you can ask for approval by e.g. a member of the Project Board.

Request document approval

Step 1. Navigate to the document you want request approval for:



Step 2. Select the row of the appropriate document and click **Request Approval**, a dialogue box appears:



Dialogue request approval

Step 3. Use the radio buttons for either serial or parallel approval, set the due date, then select the approver(s) for the document. Use the check boxes to set notifications and click **Start workflow**. The approval request is now available on the Home Page of the approvers; the plan-item page shows the approval status.

3.13.4 Working with document folders

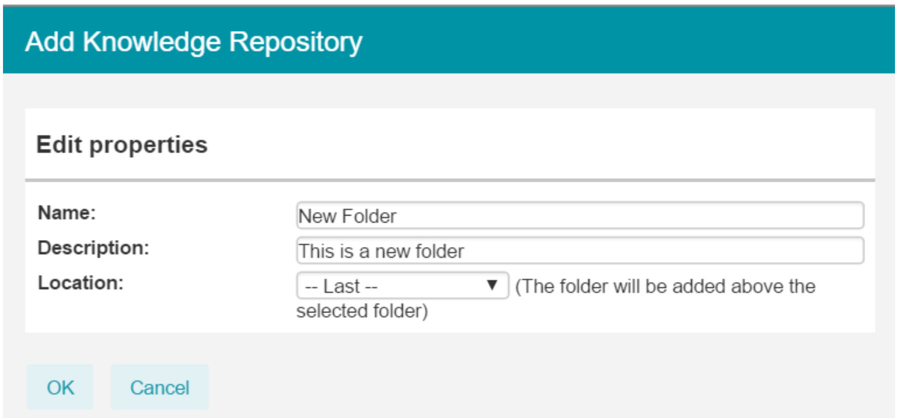
To store documents or templates in structured way, you can create a document folder structure in the Principal Toolbox.

<u>Create a document folder structure</u>

Step 1. Navigate to a documents section, for example the **tab Documents** in a project.

Step 2. Click + in the Documents Folders section, a dialogue box appears:

FORTES



Dialogue Add a document folder

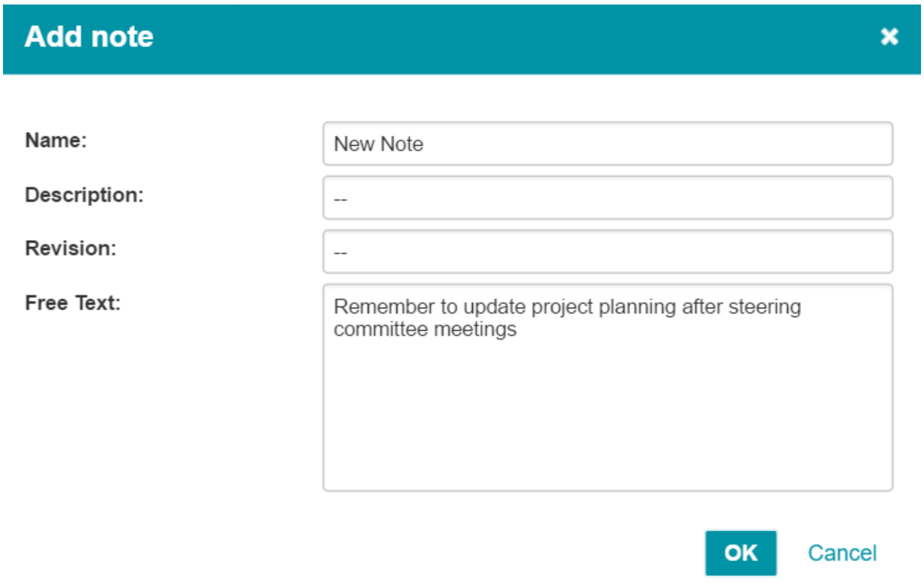
Step 3. Enter the name and description of the new folder and select a location.

3.13.5 Working with Notes

Notes can be added to keep track of important things you need to remember.

Step 1. Go to a Documents section in the Principal Toolbox.

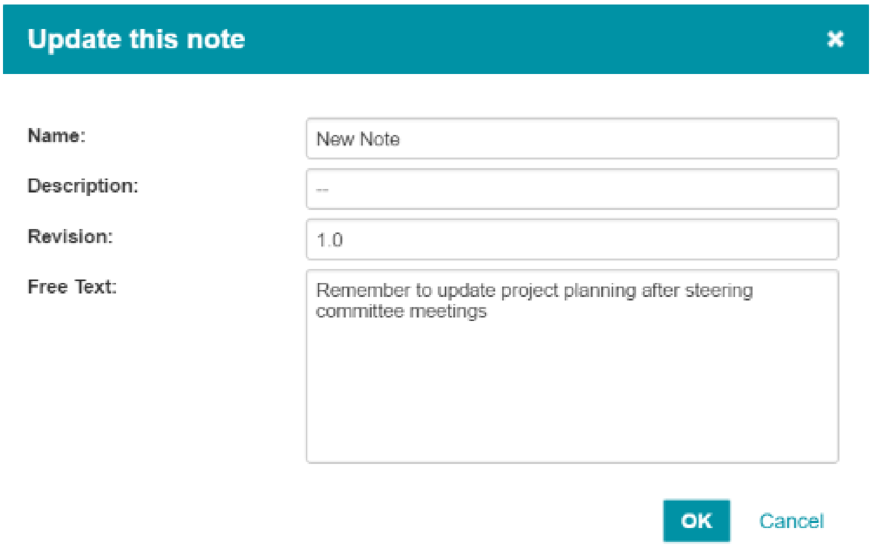
Step 2. Click + Note, a dialogue box appears:



Dialogue add a note

Step 3. Enter the dialogue box and click **OK** to add the Note to the documents section:

Step 4. To update an existing Note, select the row of the note and click **Update**, a dialogue box appears:



Update screen of a note

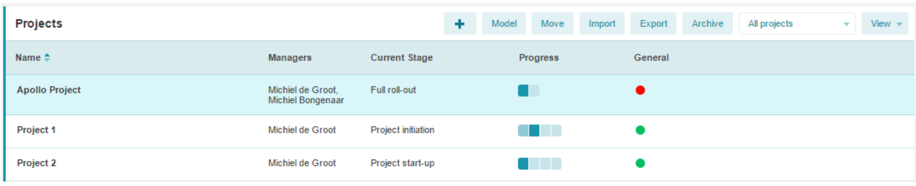
Step 5. Edit the information in the dialogue box and click **OK**.

3.14 Working with the Archive

You can archive an OU, portfolio, portfolio-item, folder, programme or a project. Doing this will make these items visible in the tab **Archive.** This tab exists in OUs, portfolios and maps.

Archiving items

Step 1. Navigate to the respective dashboard.
Step 2. Select the line of the correct item:



Step 3. Click **Archive**, a pop-up appears.
Step 4. Click **Archive** again.

Note: Projects have to be archived in the modules Portfolio Management and Project Management. These are separate actions that must be performed manually in each module.
Note: When archiving items, all underlying items are achieved as well. For example: when a folder is archived with projects in it, these projects will be archived as well. Same holds for OUs, possibly containing portfolios, folders and projects.

Restoring archived items

Step 1. Navigate to the appropriate **tab Archive**
Step 2. Select the line of the correct item
Step 3. Click **Restore** , a pop-up appears
Step 4. Click **Restore** again.

Removing archived items

Step 1. Navigate to the appropriate **tab Archive**
Step 2. Select the line of the correct item, click .

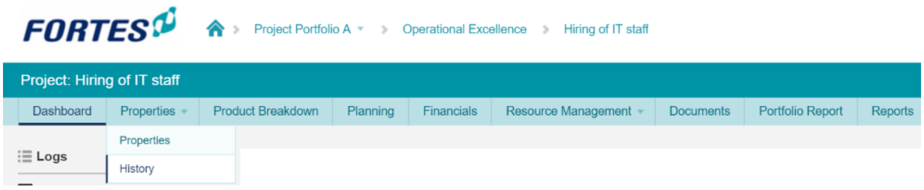
WARNING: *Removing archived items deletes it with all underlying items* *__permanently__*. *The data cannot be brought back!*

3.15 Viewing the Change History

In Principal Toolbox you can view the change history of certain items: who changed what at what point in time. Change history is logged for Projects, Plan items, Folders, Programmes, Portfolios, Organisational units and Import/export tasks.

<u>View the change history</u>

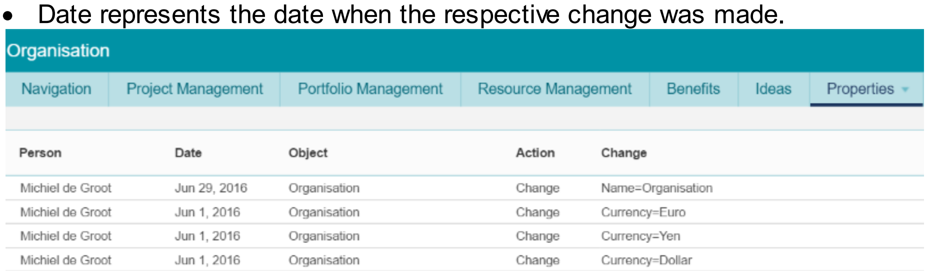
Step 1. Go to the properties page of an object/task and select **subtab History**.



The subtab History.

Step 2. The change history appears. Each row shows a change:

- Person shows who made the change
- Change shows what change was made
- Date represents the date when the respective change was made.



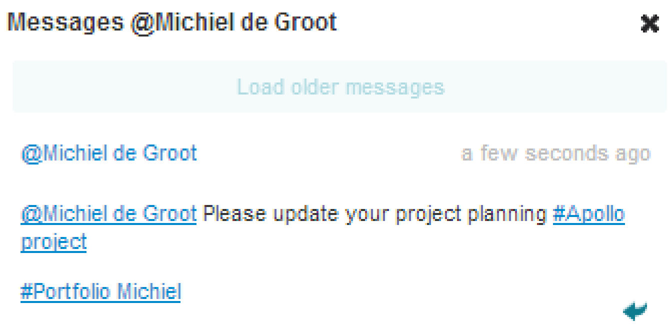
Person	Date	Object	Action	Change
Michiel de Groot	Jun 29, 2016	Organisation	Change	Name=Organisation
Michiel de Groot	Jun 1, 2016	Organisation	Change	Currency=Euro
Michiel de Groot	Jun 1, 2016	Organisation	Change	Currency=Yen
Michiel de Groot	Jun 1, 2016	Organisation	Change	Currency=Dollar

Logged Change history in an Organisational Unit

3.16 Messaging

You can send messages to users or objects with the messaging function. Click on the icon to send messages. Send a message to another user by using @ followed by the name of your colleague, or send notifications to a project by using # followed by the name of the project. It is also possible to send messages to plan items or log items. This function is available only for Dutch SaaS customers

A yellow number in the icon indicates new messages.



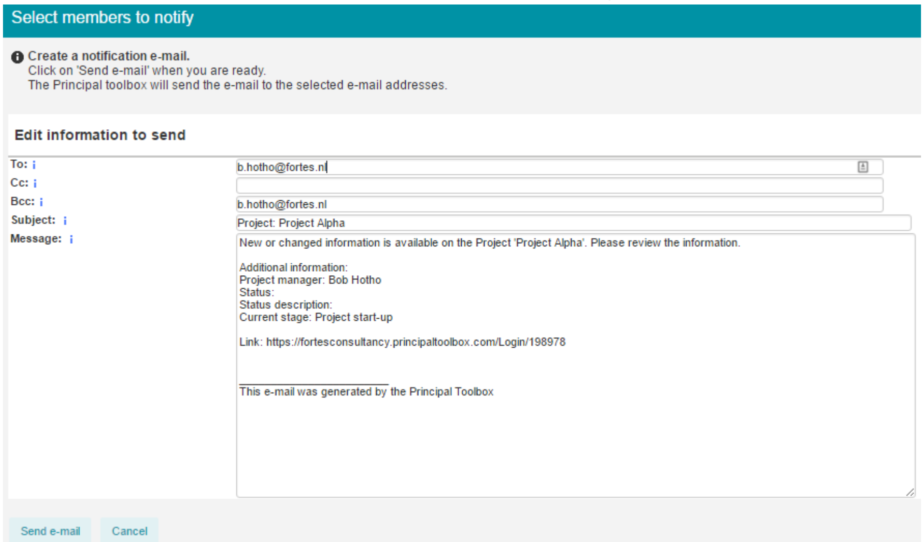
3.17 Send e-mail to members

From many locations such as portfolios, programmes,projects and log-items you can send an email to the manager(s) and/or owners. For example:

- On a log-item page, click to send an email to the log-item owner
- In a portfolio dashboard, select one or more project rows and click to send an email to the project managers.

Send an email to members

Step 1. On a location in Principal Toolbox, click , a dialogue box appears.

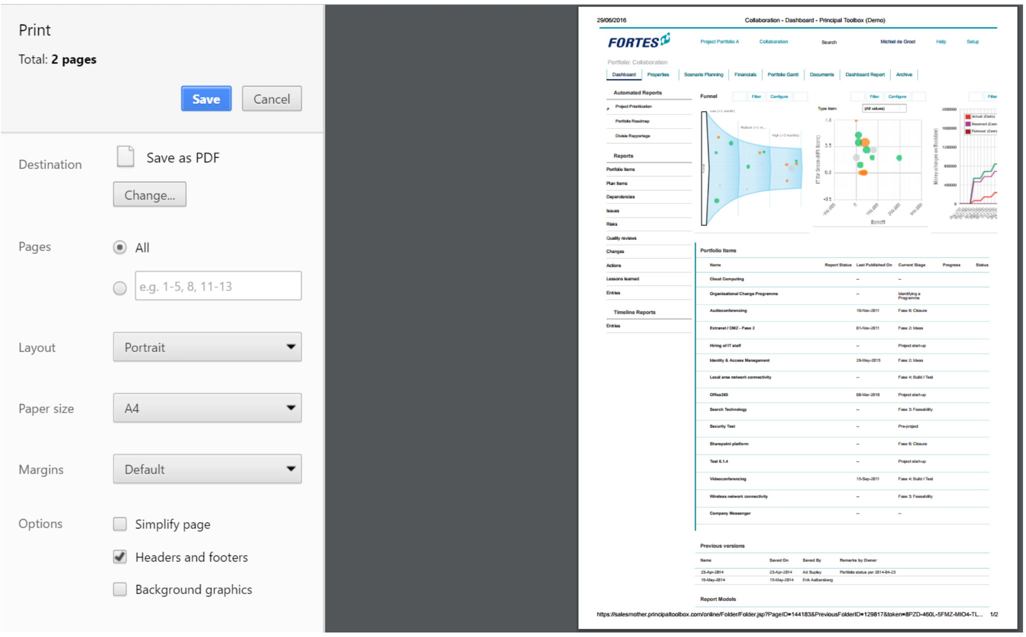


Dialogue send email to members

Step 2. Optionally edit the information in the dialogue box and click **Send e-mail**. Note: your own e-mail address is entered as BCC so you can archive the e-mail in your own mail box.

3.18 Print a page

The print a page functionality is a generic function that can be found throughout the Principal Toolbox. The print icon indicates that it is possible to print the page you are currently looking at. It can generally be found in the top header, next to the email, search and message functionality. When you click on the icon, a print settings screen appears. Here you can set print properties and see a preview of the printed page.



The dialogue box with print settings and a preview of the page.

3.19 Create an image

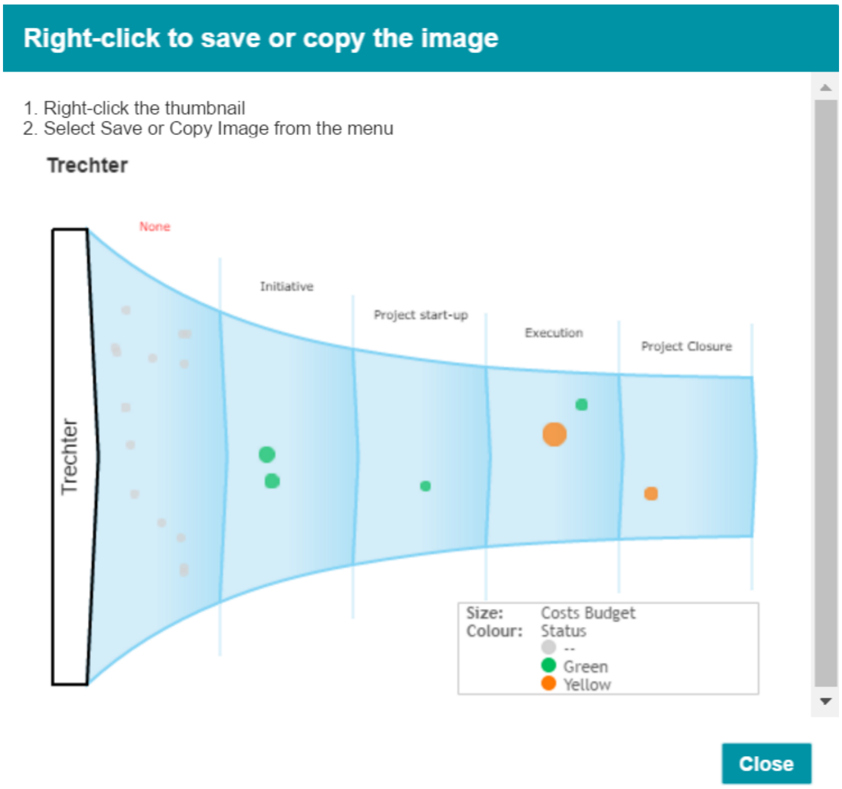
It's possible to create a PNG image file from most visuals in PTB, like widgets and Gantts. Look for the icon.

<u>Create an image from a visual</u>

Step 1. Click on the icon located next to the object you wish to convert to an image.

Step 2. A dialogue box appears. Right-click on the image and select **Save image** or **Copy**

Step 3. Now you are able to use the image outside PTB.



Funnel widget after clicking the image button (top right corner)

Working with Organisational Units

4 Working with Organisational Units

Within Organisational Units several basic functions are available: Navigation 21, Search 22, Reporting 47, Working with views 23, Working with widgets 31, Document management 62, Messaging 68, Working with roles 56, Working with the archive 67, Moving items 56, Creating items 53, Viewing the Change History 68.

Organisational Units can be used to create a hierarchical structure in Principal Toolbox. This hierarchy is visible in the drop-down list at the top of the screen and can be used to navigate.

The main features of Organisational Units are:

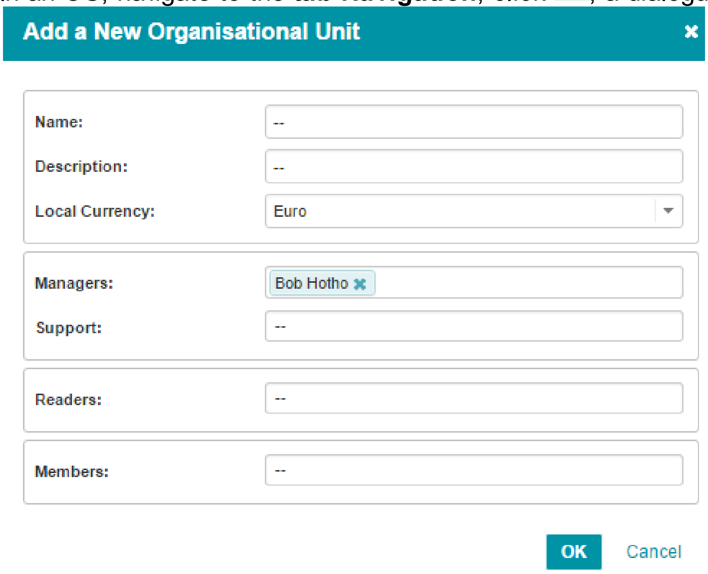
- Configure which modules are enabled and which currency is used in a Organisational Unit
- Determine which users have which access to the Organisational Unit as a whole, or to the enabled modules
- Easily rearrange the hierarchical structure by moving or merging Organisational Units
- Access all lessons learned within this (and underlying) Organisational Units
- Create and/or maintain models of all types

The next topics cover all relevant use cases when working with Organisational Units.

4.1 Create, move and archive OU

Create an OU

Step 1. In an OU, navigate to the **tab Navigation**, click , a dialogue box appears:



Dialogue box Add a New Organisational Unit

Step 2. Fill the dialogue box: name, description and roles, and click **OK**.

Move an OU

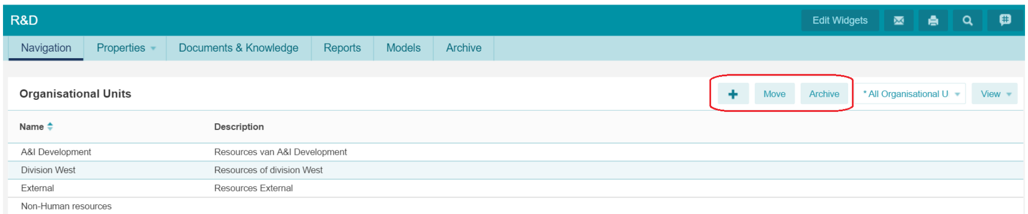
Step 1. In an OU, navigate to the **tab Navigation**.
Step 2. Select the line of the OU that you want to move, click **Move**, a pop-up appears:
Step 3. In the pop-up select the target destination and click **OK**.

Archive an OU

Step 1. In an OU, navigate to the **tab Navigation**.

Step 2. Select the line of the OU that you want to archive, click **Archive**. The selected OU will be placed in the Archive.

Step 3. Click on the **tab Archive** to inspect archived items or to remove them permanently.



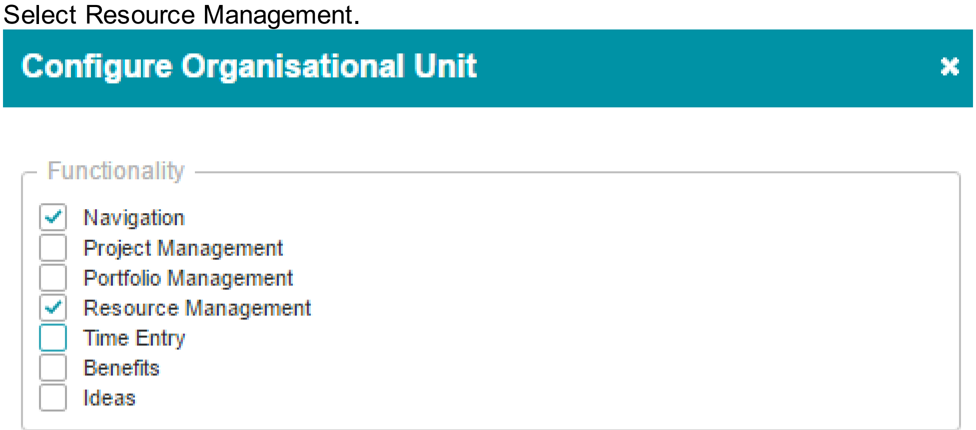
Add, move or archive an organisational unit.

4.1.1 Create an OU for Resource Management

Create an Organisational Unit

1. Navigate to the Organisation Unit in which you want to have Resource Management.

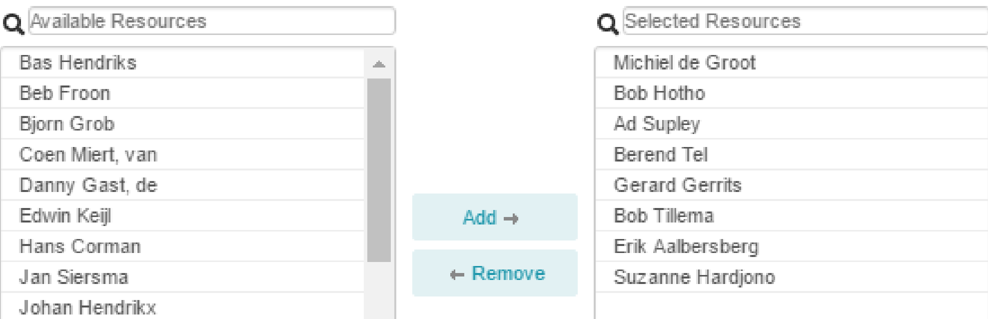
   Go to tab **Navigation**, click in section **Organisational Units** , a pop-up appears.
2. Enter data in pop-up, click **OK**
3. Navigate to the created Organisational Unit, tab **Properties**, click **Configuration**
4. Select Resource Management.



5. Navigate to the created Organisational Unit, tab **Properties**, click **Edit Roles**; assign users to correct role. Click **Close**.

Configure Resource Management

6. Navigate to tab **Resource Management**, click **Resource Management Configuration**, a pop-up appears. Select the **Non-Project Activity Set**.
7. Click **OK.**
8. Navigate to tab **Resource Management**, click **Edit Resources**, a pop-up appears. Add users, click **OK.**



Note: Resource Management is often combined with Time Entry within one Organizational Unit.
See also: Configure an OU for Time Entry 76

4.1.2 Configure an OU for Time Entry

Configure the organisational unit for time entry

Step 1. Go to the **tab Resource Management**, click on **Resource management configuration**, a dialogue box appears.

Step 2. Fill in the dialogue box: enter the appropriate Time Entry configuration, optionally enter a minimum of hours per timesheet, select approvers and select the appropriate Non-project activity set(s).

Step 3. Next click **OK**.

Note: To do this, Time registration has to be an enabled module in the OU. To do this, go to **tab Properties** of the OU, click **Configuration** and check the box Time registration.

Note: Approvers can only be set when your configuration is not set for automatic approval.

Add the members who have to register time

Step 1. Go to the **tab Resource management**, click **Edit resources**, a pop-up appears.

Step 2. In the pop-up click **Add/Remove** to add or remove members.

Step 3. Click **OK**.

4.2 Edit OU properties

The properties of an OU (f.e. the name) can be modified.

Step 1. Navigate to the OU you wish to edit, to the **tab Properties** and click

Step 2. Edit the information and click **Save**

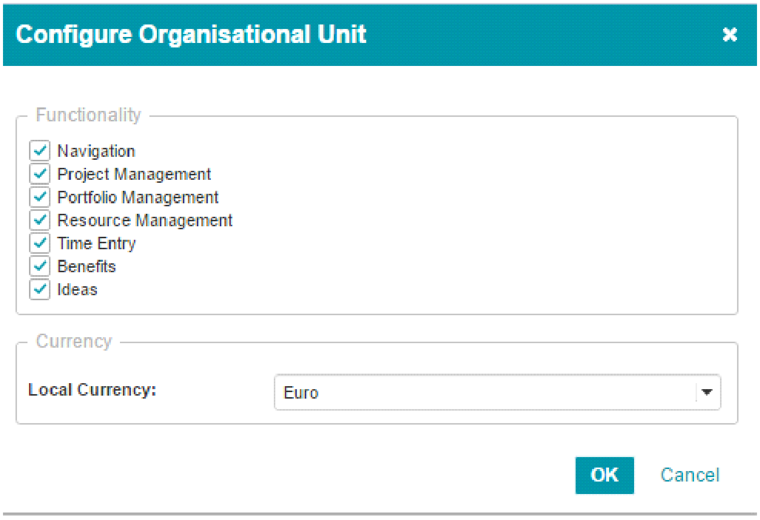
Note: It depends on your page layout and field behaviour which fields can be edited here. See Working with page lay outs for more information on page layouts, for more information on field configuration ask your administrator or see the **QRC Custom Fields** on our support portal.

4.2.1 Edit OU configuration

In an OU you can (de)activate functional modules. This allows you build a fit-for-purpose structure in the Principal Toolbox.

Edit OU configuration

Step 1. Navigate to an OU, to the **tab Properties**, click **Configuration**, a pop-up appears:



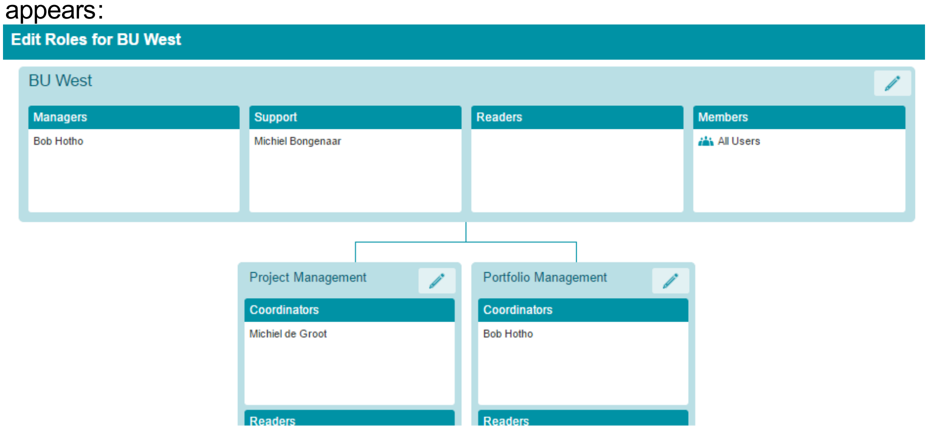
Modules can be (de)activated in the OU configuration

Step 2. Use the check boxes to select which modules should be active.
Step 3. Select the **Local Currency** for this OU.
Note: this option is available depending on your configuration.
Step 4. Click **OK**.

4.2.2 Edit OU roles

In an OU you can define roles on OU level and on functional module level.

<u>Edit OU roles</u>
Step 1. In an OU, navigate to the **tab Properties** and click **Edit Roles**., a pop-up appears:



Pop-up Edit Roles on OU

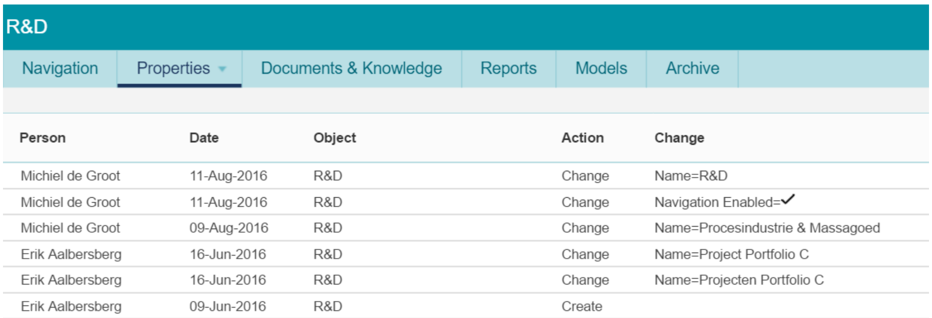
Step 2. To edit roles on OU-level, click in the top section, in the pop-up edit the roles.
Step 3. To edit roles on functional module level click in the module section, and in the pop-up edit the roles.
Note: which modules you see depends on the configuration of the OU.
Step 4. Click **OK**, then click **Close**.

Note: To give a user a role in a functional module, he must have a role on OU-level.
Note: The user group **All Users** is an system group that always contains all users; if appropriate you can use this group in the OU-role **Members**

4.3 View change history of OU

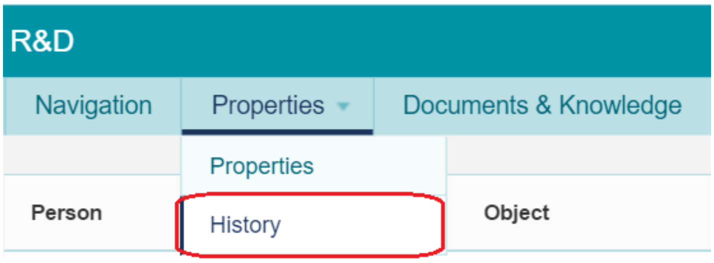
Edit history of an OU can be inspected. PTB saves the date, person, type of action/ change to what object automatically.

View change history of OU
Step 1. Hover over the tab **Properties** of the OU of which you want to inspect the change history. A drop-down appears.
Step 2. Click **History.**
Step 3. Change history of the OU is now visible.



Person	Date	Object	Action	Change
Michiel de Groot	11-Aug-2016	R&D	Change	Name=R&D
Michiel de Groot	11-Aug-2016	R&D	Change	Navigation Enabled=✓
Michiel de Groot	09-Aug-2016	R&D	Change	Name=Procesindustrie & Massagoed
Erik Aalbersberg	16-Jun-2016	R&D	Change	Name=Project Portfolio C
Erik Aalbersberg	16-Jun-2016	R&D	Change	Name=Projecten Portfolio C
Erik Aalbersberg	09-Jun-2016	R&D	Create	

View change history of OU

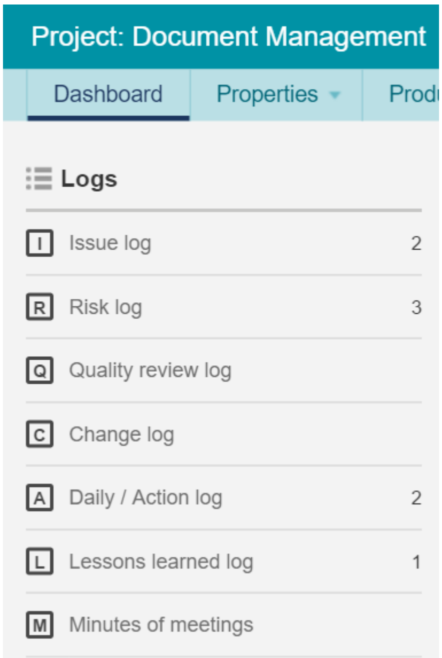


Click History to check out change history of the OU

4.4 Working with Lessons Learned

Lessons learned can be saved in projects using the lessons learned log.

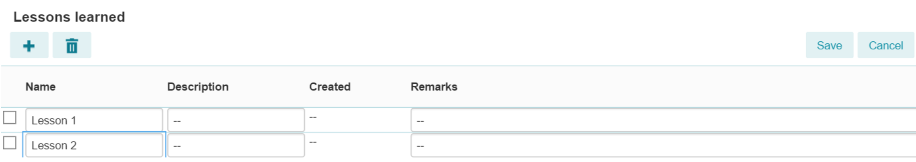
To save lessons learned, follow the next steps:
Step 1. Navigate to the project for which you want to save lessons learned.
Step 2. In the tab **Dashboard,** click **'Lessons learned log'** found in the log section.



The log section found in projects

Step 3. A pop-up appears. Click to add a lesson learned.

Step 4. A new row appears. Fill in the Name, Description and General Remarks about the lesson learned. Additional fields can be added here, see [Working with views](23).



Quickly add lessons learned using the

Step 5. Click **Save** to save the added items

Step 6. Once created, click on the name of the lesson learned to go to the detail page. Here, additional information can be saved and documents can be added

Step 7. Click to add a document or drag and drop a document in the designated section. This can be done in lessons learned overview page and the detail page.

Note: Lessons learned can be made available on OU level when this is allowed in the settings. Go to **Setup, Configuration, Principal Toolbox**. Click and change the value behind 'Display all lessons learned at organisational units with project management enabled' to **Yes.** Click **OK** to save changes. A additional tab 'Lessons Learned' will be displayed in OUs where project management is enabled. All members can view all lessons learned from the entire enterprise.

Setting	Value
Use of PRINCE2 roles	Full set of Roles
Allow managers and support on folders to edit underlying projects, programmes and folders	No
Display all lessons learned at organisational units with project management enabled	Yes

Allow lessons learned to be displayed

4.5 Working with models

When working with models, the following basic functions are applicable: Navigation 21, Search 22, Working with views 23, Document management 62, Messaging 68, Working with the archive 67, Viewing the Change History 68.

What is a model?

PTB works with models to give basic structure and configuration to some of its major objects, like projects, programs or portfolios. Generally speaking, a model is a blueprint of an object that will be copied when the actual object (f.e. Project) is created. After the creation of the object, changes can be made to the individual objects but it will still be connected to the model. This allows for easy and effective administration since some of the elements in model are dynamic: this means that changes also apply to the objects that where created by this model. Besides, the model also holds static elements, which means that changes to these parts only apply future objects based on this model. Models can contain configured pages, planning, product approval, documents, automated reports. A model look like the object it is meant for (a project model looks like a project), the only visible difference is the notification in the top blue header. See below for a list of static and dynamic elements (this may differ for different types of models):

- *Dynamic:* These changes do affect existing projects (with the same model): Property page, existing automated reports, product approval, page layout of products, widgets, cost and hour behaviour
- *Static:* These changes do not affect existing projects (with the same model): Planning, linked resource pools and new automated reports.

Note: When roles are assigned to users in a project model, these are not transferred to a project!

<u>Why work with models?</u>

The advantages of working with models are:

- Assurance of 'standards' which are provided by the model
- Efficiency in administration, changes in the model often also apply to objects that where created from them.
- Models allow you to quickly fill your application with objects, since they are copies of the model
- Different models allow for different ways of working (f.e. models for small, medium and large projects)

<u>Types of models</u>

Several types of models are available in PTB:

- Project models
- Programme models
- Portfolio models
- Report models

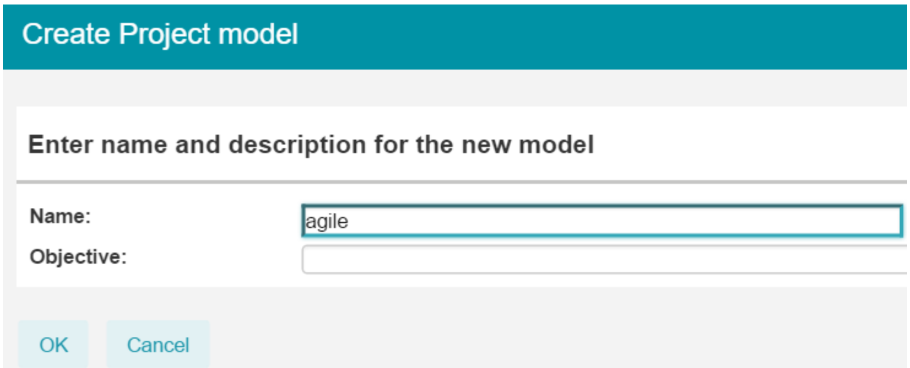
For more information about configuring models, see the **QRC Functional Administration** on our support portal or contact your system administrator.

4.5.1 Creating or moving models

You can create a (project) model by importing/exporting an existing model or by creating a model from an existing object. In the example below, a model is based on a project.

<u>Creating a model from an existing project</u>

Step 1. Go to a folder in the module Project Management.
Step 2. In the **section Projects**, go to the project.
Step 3. Select the project on which you want to base the model by selecting the correct row.
Step 4. Click **Model**.
Step 5. Enter the data for the model.



Enter details when creating a model

Step 6. Confirm by clicking **OK**.
Step 7. The model is now displayed under the tab **Models**, in the **section Project models**.
Step 8. If the project model should be available for other projects you can either export/import the model or move it to the target location. The difference is that export/import makes a copy of the model and the model is in the original location and the new location. When moving the model, it is only available in the new

location.

Import/export:

- Select the model in the **Project Models** section and click **Export;** Save the file.
- Go to the Organisational Unit with **Project Management**, to the tab **Models**.
- Click in the **Project Models** section **Import**, enter the data in the pop-up screen and click **OK**.

Move:

- Select the model in the **Project Models** section and click **Move**; a pop-up appears
- Choose the target location and click **OK**.

It is dependent of the project's starting location (OU and map) which models are available. Below is an overview of which models are available when starting a project. Please note the difference between an OU and a map!

- All models that are in the map (on tab map > models).
- All models that are in the parent folders (within the OU; on the tab map > models).
- All models that are in the OU tab models.
- All models that are in the parent OUs on the tab models.

This implies that for two locations the models are *not* available:

- The models that (in the same OU) are in other maps at the same level, i.e. adjacent maps (on the tab map > models).
- The models that are in the folders of parent OUs (on the tab map > models).

Note: This way of working also applies for other types of models.
Note: When making adjustments to a Project Model:

- These adjustments do affect existing projects: property pages, existing automated reports, approvals of products, custom layouts of products, widgets behaviour costs and hours.
- These adjustment do not affect existing projects: staging/planning, linked resource pools, new automated reports.

Note: When roles are assigned to users in a project model, these are not transferred to a project!

Working with Portfolio Management

5 Working with Portfolio Management

Within the Portfolio Management module several basic functions are available: Search [22], Messaging [68], Navigation [21], Working with widgets [31], Working with views [23], Working with the archive [67], Viewing the change history, [68] Working with roles [56], Document management [62].

The Portfolio Management module allows you to manage portfolios:
1. Are we doing the right things?
2. Are we doing them in the right way?

This module supports the process 'from not-yet-started project to project close' from the portfolio point of view. A portfolio can contain initiatives ('not-yet-started' projects), projects and programmes. The Portfolio Management module supports scenario planning (selecting the best possible set of projects), and managing a portfolio (start, monitor and manage all initiatives, projects and programme on all relevant aspects, report on the portfolio). For managing benefits see the related topic Working with Benefits [158].
Doing the right things is supported by analysis of portfolio items based on for example priority, impact and strategic alignment. Custom fields can be used to hold relevant data.
Doing all projects together in the right way is supported by the reporting cycle between portfolio's and projects. This gives the portfolio manager the opportunity to manage projects on highlights and dependencies, based on the input of project managers.

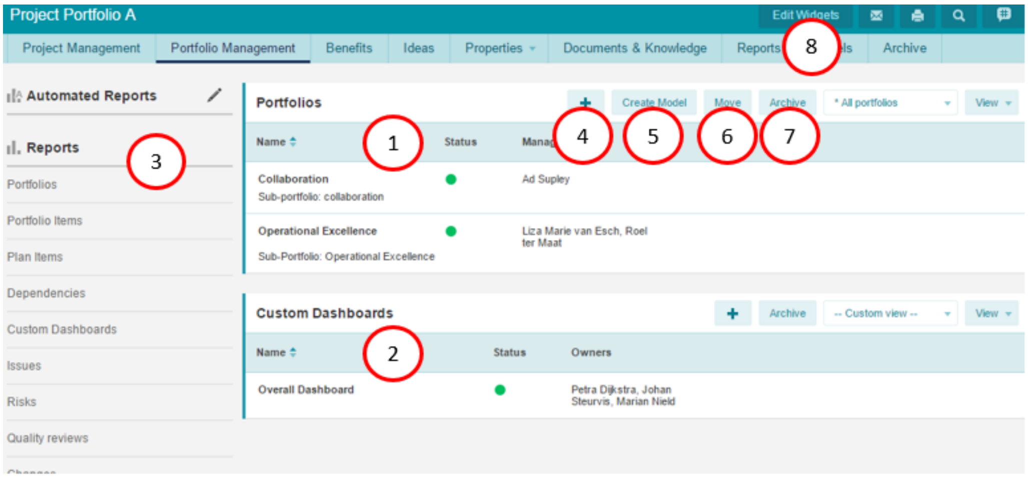
The main features of the Portfolio Management module are:
- Create multiple portfolios and group projects as you see fit. For example: group projects by sponsorship, by strategic goals, by business unit, or otherwise.
- Plan, manage and report on portfolio's on all relevant aspects.
- Use Custom Dashboards to view and report on any group of projects, irrespectively of the grouping in portfolios.
- Create and share widget based reports with your stakeholders. These reports can be viewed in an mobile app without having to log in to Principal Toolbox.

The next topics cover all relevant use cases when working with Portfolio Management.

5.1 Working with the Portfolio Management Dashboard

The Portfolio Management Dashboard is the highest level of the Portfolio Management module. This dashboard shows all portfolios and custom dashboards in which you have a role.

The main features on the Portfolio Management Dashboard are:
? Navigate to your portfolio or custom dashboard.
? Report on all information in all your portfolios.
? Create, move or archive a portfolio.
? Create or archive a custom dashboard.
? Create a portfolio model from a portfolio.



The Portfolio Management Dashboard

<u>What you see on the Portfolio Management Dashboard</u>

1. A list of portfolios in which you have a role.
2. A list of custom dashboards in which you have a role.
3. A report section where you can report on any information in your portfolios.
4. Click + to create a new portfolio (Note: option available depending on your role).
5. Select a portfolio row and then click **Create Model** to create a portfolio model based on an existing portfolio (Note: option available depending on your role).
6. Select a portfolio row and then click **Move** to move a portfolio to another location (Note: option available depending on your role).
7. Select a portfolio row and then click **Archive** to move a to the archive (Note: option available depending on your role).
8. Click **Edit Widgets** to add widgets in the top section of the dashboard. See Working with widgets 31.

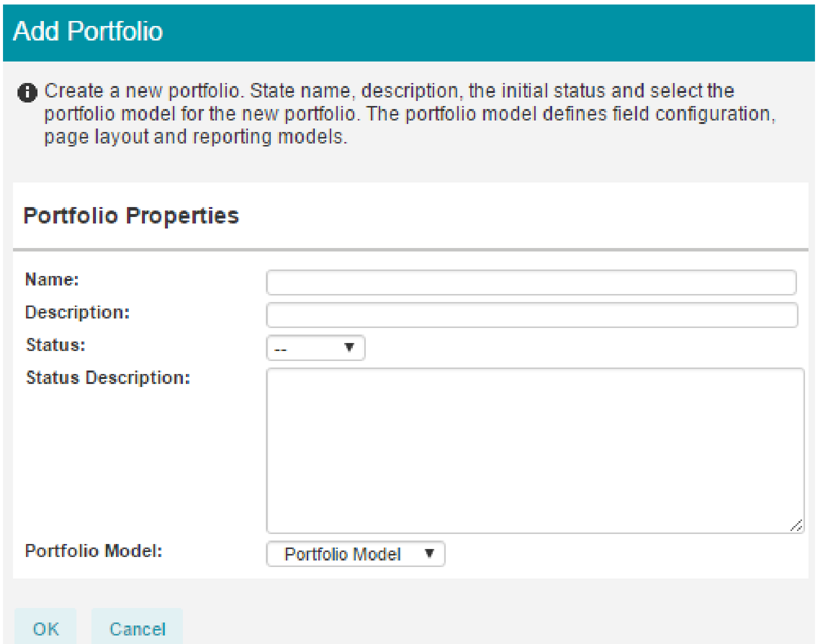
5.1.1 Create, move or archive a Portfolio

<u>Create a portfolio</u> (Note: option available depending on your role)

Step 1. Navigate to the tab **Portfolio Management**.

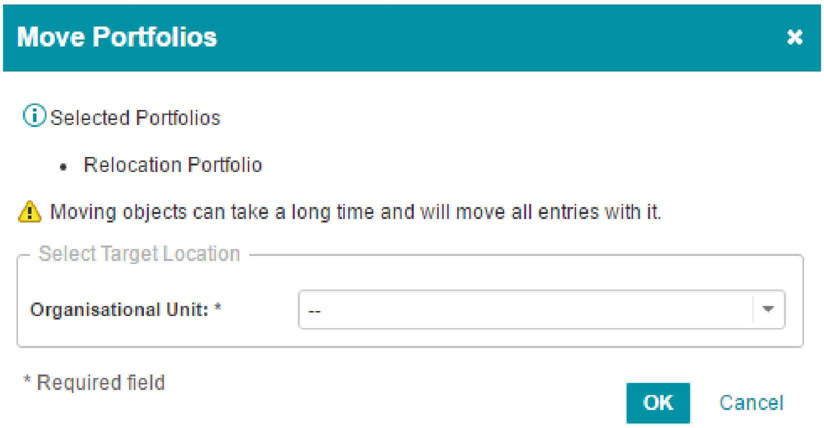
Step 2. In the section **Portfolios**, click +, a dialogue box appears.

Step 3. Fill in the dialogue and click **OK**.



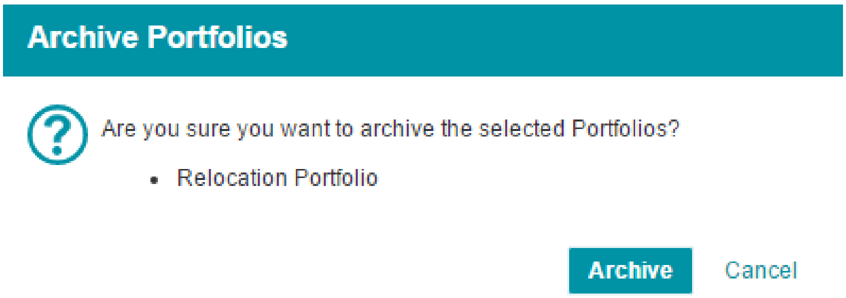
Dialogue box create a portfolio

<u>Move a portfolio</u> (Note: option available depending on your role)
Step 1. Navigate to the tab **Portfolio Management**.
Step 2. In the section **Portfolios**, select a portfolio row and click **Move**, a dialogue box appears.
Step 3. In the dialogue box, select the Organisational Unit and the folder and click **OK**.



Dialogue box move a portfolio

<u>Archive a portfolio</u> (Note: option available depending on your role)
Step 1. Navigate to the tab **Portfolio Management**.
Step 2. In the section **Portfolios**, select a portfolio row and click **Archive**, a pop-up appears.
Step 3. In the pop-up click **Archive**, the portfolio is now moved to the tab **Archive**.



Dialogue box archive a portfolio

5.1.2 Create or archive a Custom Dashboard

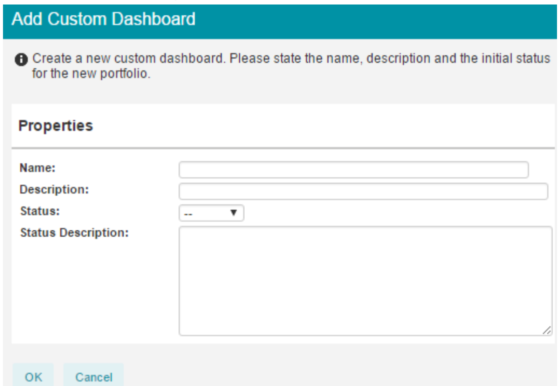
Note: Custom Dashboards are only visible when activated in the configuration.

<u>Create a **Custom Dashboard**</u> (Note: option available depending on your role)

Step 1. Navigate to the tab **Portfolio Management**.

Step 2. In the section **Custom Dashboards**, click +, a dialogue box appears

Step 3. Fill in the dialogue and click **OK**.

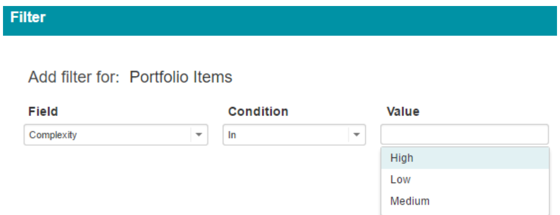


Dialogue box create a Custom Dashboard

Step 4. To define which projects are shown in this Custom Dashboard click **Set Dashboard Filter**, a dialogue box appears.

Step 5. In the dialogue box define the filter(s) to show the correct set of projects, click **OK**.

Step 6. Click **Edit Roles** to give users access to the Custom Dashboard. See Working with roles 56.



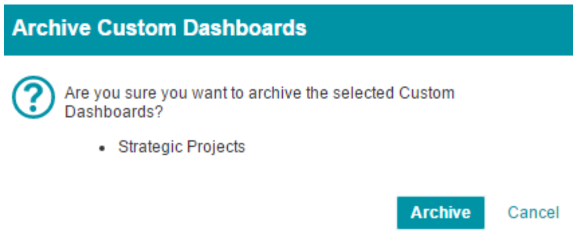
Dialogue box Set Dashboard Filter

<u>Archive a custom dashboard</u> (Note: option available depending on your role)

Step 1. Navigate to the tab **Portfolio Management**.

Step 2. In the section **Custom Dashboards**, select a **Custom Dashboard** row and click **Archive**, a pop-up appears.

Step 3. In the pop-up click **Archive**, the **Custom Dashboard** is now moved to the tab **Archive**.



Dialogue box archive a Custom Dashboard

5.1.3 Create a Portfolio Model from a Portfolio

In Principal Toolbox all portfolios are based on a portfolio model. A portfolio model defines the behaviour of a portfolio:

- The field configuration
- The financial configuration
- The page lay-out of portfolio items
- The available report models
- The available Automated Reports

In a portfolio it is possible to deviate from the behaviour of the portfolio model. And then, it is possible to save that changed behaviour as a new portfolio model. This new model can then be used when creating a new portfolio.
Note: it is also possible to create new portfolio models by exporting and importing an existing portfolio model (at the tab **Models**).

Create a portfolio model from a portfolio (Note: option available depending on your role)
Step 1. Navigate to the tab **Portfolio Management**.
Step 2. In the section **Portfolios**, select a portfolio row and click **Create Model**, a dialogue box appears.
Step 3. In the dialogue box, enter a name for the portfolio model and click **OK**; a portfolio model is now created in the tab **Models**.

5.2 Working in a Portfolio

Within portfolios several basic functions are available: Search 22, Messaging 68, Working with widgets 31, Working with views 23, Working with roles 56, Viewing the change history 68, Working with the archive 67, Document management 62.

The main features of working in a portfolio are:

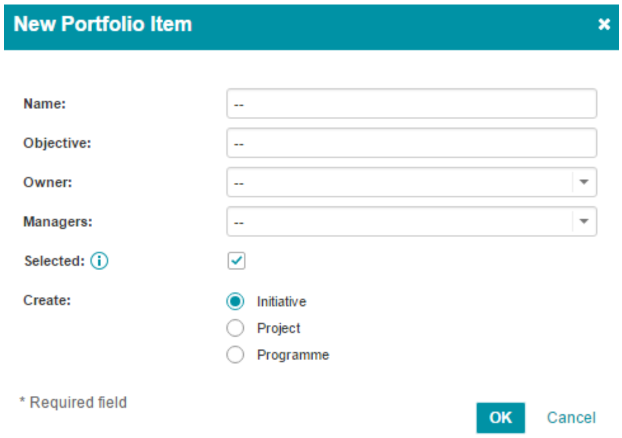
- Plan, manage and report on your portfolio on all relevant aspects.
- Have projects and programmes report to your portfolio
- Create and share widget based reports with your stakeholders. These reports can be viewed in an mobile app without having to log in to Principal Toolbox.

The next topics cover all relevant use cases when working with portfolios.

5.2.1 Starting an Initiative

A portfolio can contain different kinds of portfolio items: initiatives, projects and programmes. Initiatives are 'not-yet-started-projects' and can be used in the portfolio selection process.

Starting an initiative
Step 1. Navigate to your **Portfolio**
Step 2. In the section **Portfolio Items**, click +, a dialogue box appears:



Step 3. Enter the details:

- Name: the name of the initiative
- Objective: the objective of the initiative
- Owner: this user gets access to the initiative, without getting access to the entire portfolio
- Managers: the intended project or programme manager
- Selected: check box to make the initiative appear in the active portfolio (see Using scenario planning on a portfolio 95)
- Create: select **Initiative**

Step 4. Click **OK**, the initiative is created and appears in the portfolio.

Note: it is also possible to start an initiative from an idea, see Starting an Initiative from an Idea 156.

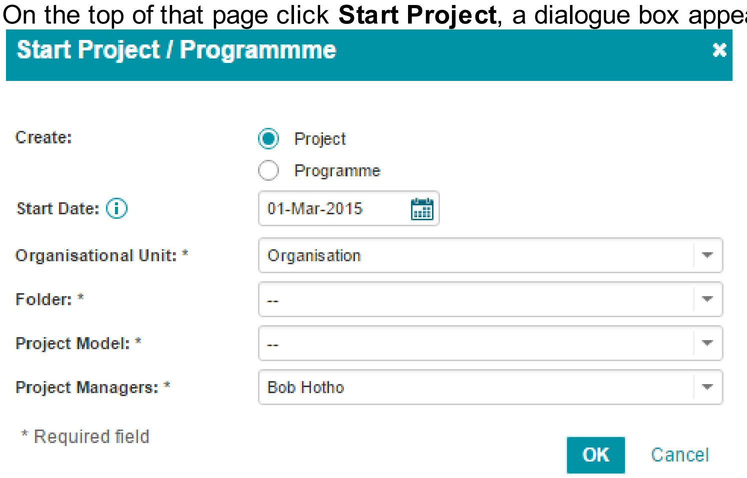
5.2.2 Starting a Project from an Initiative

It is possible to start a project from an initiative. By applying a Project Model an initiative is transformed into a project.

Starting a project from an initiative

Step 1. Navigate to a portfolio and click on the name of the initiative to open the details page.

Step 2. On the top of that page click **Start Project**, a dialogue box appears:



Step 3. Enter the details:

- Create: check the option **Project** to create a project.
- Start Date: moves the planning in the Project Model (if available) to this date.
- Organisational Unit: select the Organisational Unit in which to start the project.
- Folder: select the Folder (within the selected Organisational Unit) in which to start the project.

- Project Model: select the Project Model to be used for the project.
- Project Managers: select the Project Manager for the project.

Note: See Creating or moving models 81 to see the details of which models are available at selection and how to change this if necessary.

Step 4. Click **OK**, the project is created and appears in the designated **Folder**.

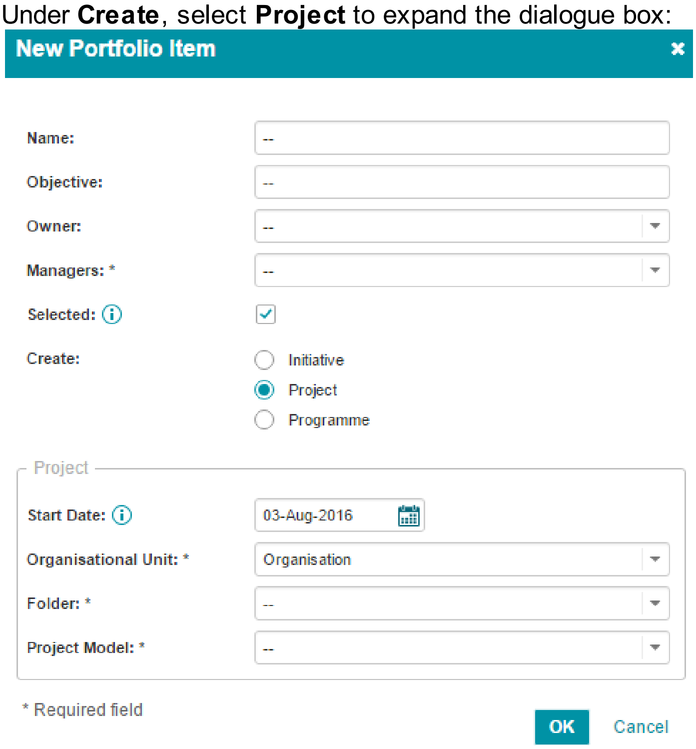
5.2.3 Starting a Project

In a portfolio you can create new projects. By applying the appropriate Project Model the project manager gets a 'quick start'.

Starting a project

Step 1. Navigate to your portfolio and click + in the section **Portfolio Items**., a dialogue box appears.

Step 2. Under **Create**, select **Project** to expand the dialogue box:



Step 3. Enter the details:

- Name: the name of the project
- Objective: the objective of the project
- Owner: this user gets access to the portfolio-item (but not to the project!), without getting access to the entire portfolio
- Managers: the project manager
- Selected: check box to make the initiative appear in the active portfolio (see Using scenario planning on a portfolio 95)
- Start Date: moves the planning in the Project Model (if available) to this date.
- Organisational Unit: select the Organisational Unit in which to start the project.
- Folder: select the Folder (within the selected Organisational Unit) in which to start the project.
- Project Model: select the Project Model to be used for the project.

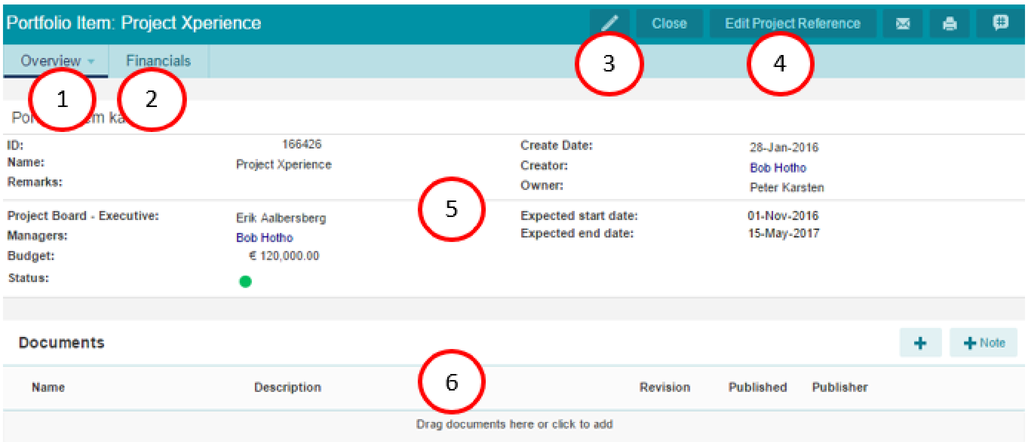
Note: See Creating or moving models 81 to see the details of which models are available at selection and how to change this if necessary.

Step 4. Click **OK**, the project is created and appears in the designated **Folder**.

5.2.4 Working with Portfolio Items: the Portfolio Item Card

Within portfolio items several basic functions are available: Search 22, Messaging 68, Working with widgets 31, Working with roles 56, Viewing the change history 68, Document management 62.

A portfolio can contain different kinds of portfolio items: initiatives, projects and programmes. The portfolio item card shows relevant information on a portfolio item. The portfolio item card can be used for a 'quick view' and for editing information.



A Portfolio Item Card

<u>What you see on a Portfolio Item Card</u>

1) Tab Overview: view and/or edit portfolio item information (as defined in the Portfolio Model. See Working with Models 80).
2) Tab Financials: view and/or edit financial information using the financial grid (as defined in the Portfolio Model. See Working with Models 80).
3) Click [edit] to edit information on the portfolio item card.
   Note: which fields can be edited depends on your role and on the field configuration (as defined in the Portfolio Model. See Working with Models 80).
4) See Edit the Project Reference 92.
5) Contents of the portfolio item card (as defined in the Portfolio Model. See Working with Models 80).
6) Section for adding documents to the portfolio item. See Document Management 62.

The next topics cover use cases when working with the portfolio item card.

5.2.4.1 View/edit information on the Portfolio Item Card

The portfolio item card shows relevant information on a portfolio item. Which information is shown is defined in the Portfolio Model. See Working with Models 80.

<u>View/edit information on the Portfolio Item Card</u>

Step 1. Navigate to the portfolio item card (e.g. in a portfolio, click the portfolio item name), to the **tab Overview**.

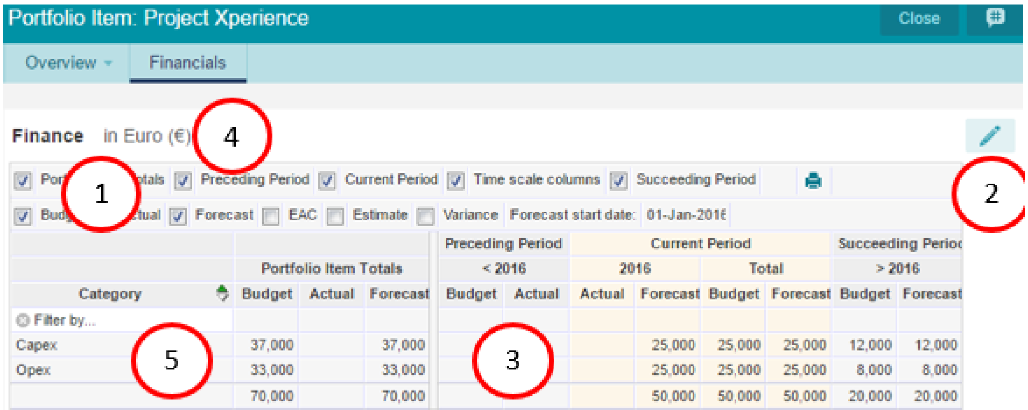
Step 2. Click [edit] to edit information on the portfolio item card.
Note: which fields can be edited depends on your role and on the field configuration (as defined in the Portfolio Model. See Working with Models 80.).
Note: field marked with a * are required fields. Pages with required fields can only be saved when those fields have been entered.

Step 3. Edit the information you want and click **Save**.

Note: It is also possible to edit information on portfolio items directly in the portfolio dashboard. See Working with views 23.

5.2.4.2 View/edit financial information on the Portfolio Item Card

The **tab Financials** of a portfolio item card shows the financial information of a portfolio item. Which information is shown and which information can be edited by whom is defined in the Portfolio Model. See Working with Models 80.



Portfolio Item Card, tab Financials

<u>What you see on the **tab Financials** of a Portfolio Item Card</u>

1) Select which columns you want to see.
2) Click ✎ to edit the financial information. Which information you can edited is defined in the Portfolio Model. See Working with Models 80.
3) Financials per type per period per category. Which information is shown is defined in the Portfolio Model. See Working with Models 80.
4) Designation of the currency used in the financial grid.
5) The Financial Categories in use for this portfolio item (as defined in the Portfolio Model. See Working with Models 80).

<u>View/edit financial information on the Portfolio Item Card</u>

Step 1. Navigate to the portfolio item card (e.g. in a portfolio, click the portfolio item name), to the **tab Financials**

Step 2. Click ✎ to edit information in the financial grid.
Note: which information can be edited depends on your role and on the financial configuration (as defined in the Portfolio Model. See Working with Models 80).

Step 3. Edit the information you want and click **Save**.

Note: It is also possible to edit financial information on portfolio items in the financial grid of the portfolio. See Managing financials in a Portfolio 96.

5.2.4.3 Edit the Project Reference

Depending on the configuration of Principal Toolbox, projects and programmes can be started from a portfolio and/or from a folder. If you start a project or programme from a folder, it does not exist in any portfolio. If you start a project or programme from a portfolio it will be linked to a portfolio item. That link is called the Project Reference.

If you started a project or programme from a folder and you want to add it to a portfolio, you have to edit the project reference.

Step 1. In the appropriate portfolio, start an initiative. See Starting an Initiative 88.

Step 2. Navigate to the portfolio item card and click **Edit Project Reference**, a dialogue box appears.

Step 3. Fill in the dialogue box to select the appropriate project or programme and click **OK**. The project or programme is now linked to the portfolio.

Note. This function is available depending on your role.

5.2.5 Move a Portfolio Item to another Portfolio

You can move a portfolio item to another portfolio. See Moving Items 56.

5.2.6 Archive a Portfolio Item

You can move portfolio items to the portfolio archive. See Working with the archive 67. Moving portfolio items to the archive is typically done to define which of the closed projects and programme are still visible in the Portfolio Dashboard and in Automated Reports.

Note: Whether you see archived projects and programmes in the financial grid of the portfolio depends on the financial configuration in the Portfolio Model. See Working with Models 80.
Note: Projects have to be archived in the portfolio separately from archiving in the folder. This is because archiving in a portfolio or folder is usually done form a different perspective.

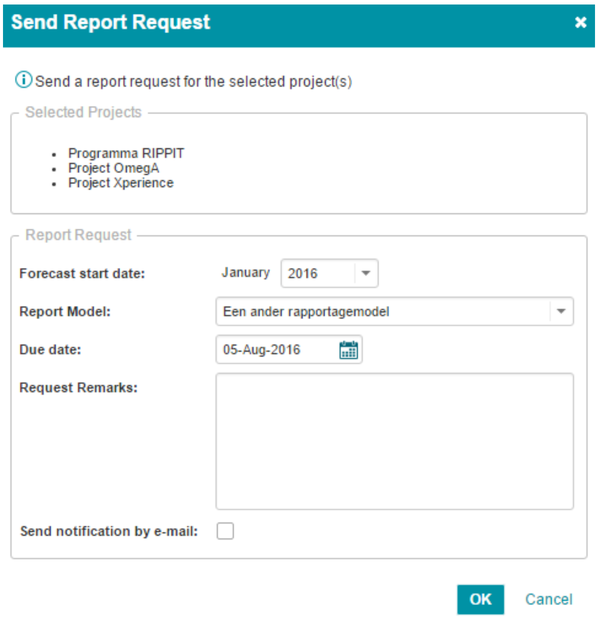
5.2.7 Send and monitor a report request to Projects/Programmes

From a portfolio you can send a request to projects and programmes to report on e.g. their status and financials. With this function you can ascertain that (specific) project and programme information can only be updated on the portfolio side through a request. The portfolio manager can monitor if or when the project and programme managers have updated the concerning information.

Sending a report request to project and programme managers

Step 1. Navigate to a portfolio. In the section **Portfolio Items** select the rows of the projects and programmes you want to send the report request to.
Note: use **Ctrl** or **Shift** to select multiple rows.
Note: to select all rows in the view, do not select any row.

Step 2. In the section **Portfolio items**, click **Send report request**, a dialogue box appears:



Step 3. Enter the **Forecast start date**, select the appropriate **Report Model** and enter a **Due date**. Optionally enter **Remarks** and check whether you want to send a notification by email or not.
Note: Depending on your role you can change and or create Report Models. See Working with Models 80.

Step 4. Click **OK**, the request is now send.

Step 5. The project and programme managers can edit the information in the report request and publish it to the portfolio

Step 6. The portfolio manager can monitor the status of all requests.

Monitoring a report request

A portfolio manager can monitor the status of his report requests in the section **Portfolio Items** by selecting a view that contains the fields 'Report Status' and 'Last Published On'. The field Report Status will show one of the following symbols:

- = the report request is past the due date, but hasn't been published yet.
- = the report request has been published to the portfolio.
- = the report request has yet to be published (but is not yet overdue).

5.2.8 Save a version of the Portfolio

You can save a portfolio as a version. A version will contain all portfolio information as is was at the moment of saving. Versions can be used in for reporting purposes.

Saving a version of a portfolio

Step 1. Navigate to a portfolio. In the section **Portfolio Items** select the rows of the portfolio items you want to include in the version.
Note: use **Ctrl** or **Shift** to select multiple rows.
Note: to select all rows in the view, do not select any row.

Step 2. In the section **Portfolio Items** click **Save Version**, a dialogue box appears.

Step 3. Enter a name, optionally add remarks and click **OK**. The portfolio version is created and is shown in the section **Previous Versions**.

Note: to view a portfolio version, in the section **Previous Versions** click on the name of a version.
Note: to report on portfolio versions in views, change the **Saved** filter: use 'Saved=yes' for reporting on portfolio versions, remove the filter Saved entirely for reporting on both portfolio versions and the current portfolio.

5.2.9 Reporting on a Portfolio

See the basic function Reporting 47 for help with reporting on a portfolio.

5.2.10 Edit roles on a portfolio

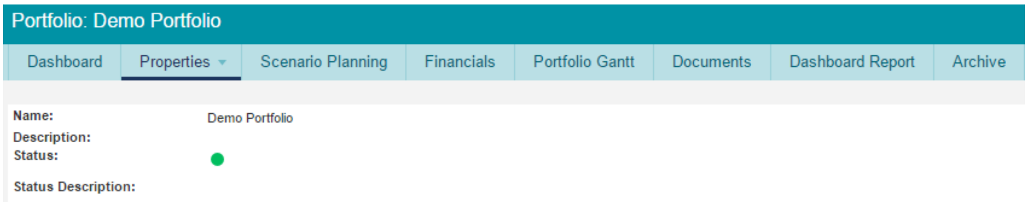
See the basic function Working with roles 56 for help editing roles on a portfolio.

5.2.11 Edit name, status and description of a Portfolio

General properties of the portfolio can be easily changed.

Step 1. Navigate to the relevant portfolio, to the **tab Properties**, and click .

Step 2. Edit the fields and click on **Save**.
Note: which fields are available depends on your configuration.



The tab Properties of a portfolio

5.2.12 Using Scenario Planning on a Portfolio

Principal Toolbox supports scenario planning for portfolios. You can set a value to maximise and you can add multiple constraints. You can calculate the best fitting scenario and you can manually create scenarios. A bubble chart and a timeline chart can be configured to visualise the scenarios.

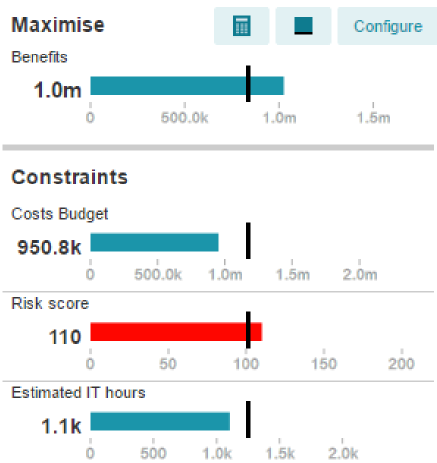
Preparing for Scenario Planning

Step 1. Configure the Bubble Chart and the Timeline Chart. See Working with Widgets 31.

Step 2. In the section **Portfolio Items** click **Set Columns** to determine which information to show here.

Step 3. Configure the Maximise/Constraints widget:

- Click **Configure** to enter which value to maximise and to enter one or multiple values as a constraint, click **OK**.
- For each value double click the bar to enter a target value



The Maximise/Constraints widget

Calculate the optimal scenario

Step 1. Perform the actions as described under Preparing for Scenario Planning.

Step 2. In the Maximise/Constraints widget click to calculate the optimal scenario based on the entered criteria. If target values are met the value bar will show blue, if not it will show red.

Step 3. View the results to see which portfolio items are selected and which are not.

Step 4. Optionally click to set a baseline for later reference.

Manually change/create a scenario

Step 1. Perform the actions as described under Preparing for Scenario Planning and Calculate the optimal scenario.

Step 2. In the section **Portfolio Items** drag and drop items between the sections **Selected Portfolio Items** and **Unselected Portfolio items**.

Step 3. View the results in the widgets at the top of the screen.

Save a scenario for later use

Step 1. If you want to save a scenario for later use or for reporting, click **Save Scenario** in the section **Portfolio Items**, a dialogue box appears.

Step 2. Enter a name for the scenario or select an existing scenario to overwrite and click **Save Scenario**.

Apply a scenario to the portfolio

Step 1. Create a scenario or select one In the section **Portfolio Items**.

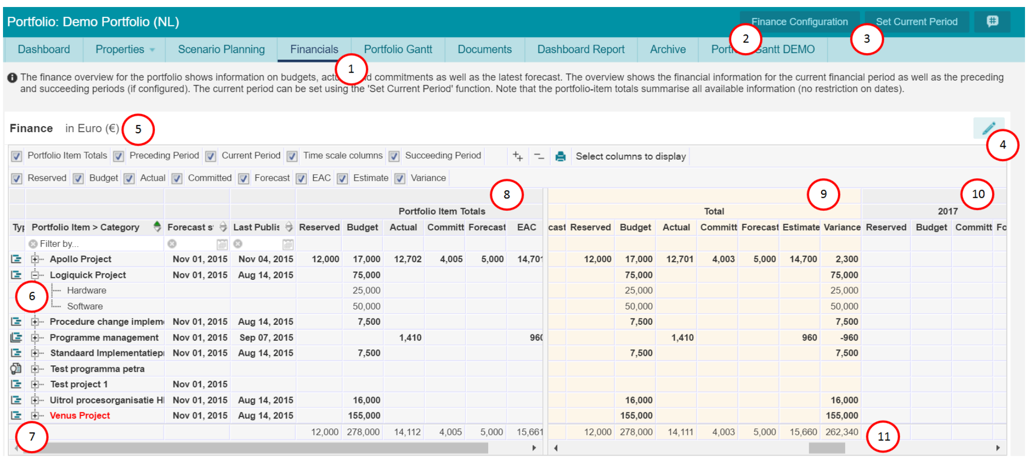
Step 2. Click **Apply to Portfolio** to apply the scenario: as a result only the selected portfolio items will be visible in the portfolio.

Note: to report on not-selected portfolio items in views, change the **Selected** filter: use 'Selected=no' for reporting on not-selected portfolio items, remove the filter Selected entirely for reporting on both selected and not-selected portfolio items.

Note: the scenario planning function is available depending on your configuration.

5.2.13 Manage financials on a portfolio

The financials of a portfolio can be managed on the **tab Financials**. What you actually see and what you can edit depends on the financial configuration in the Portfolio Model. The tab financials could look like something like this:



The tab Financials of a portfolio

What you see on the tab Financials of a portfolio

1. The **tab Financials** shows the financial information of the portfolio.
2. What you see is defined by the financial configuration in the Portfolio Model. Depending on the configuration and your role you can click **Finance Configuration** to view and/or change the financial configuration of the portfolio:
   - Adjust the time scales of the current, preceding and succeeding financial periods.
   - Adjust the behaviour of the financial types
   - Adjust the forecasting process.
   - Adjust the available financial categories.

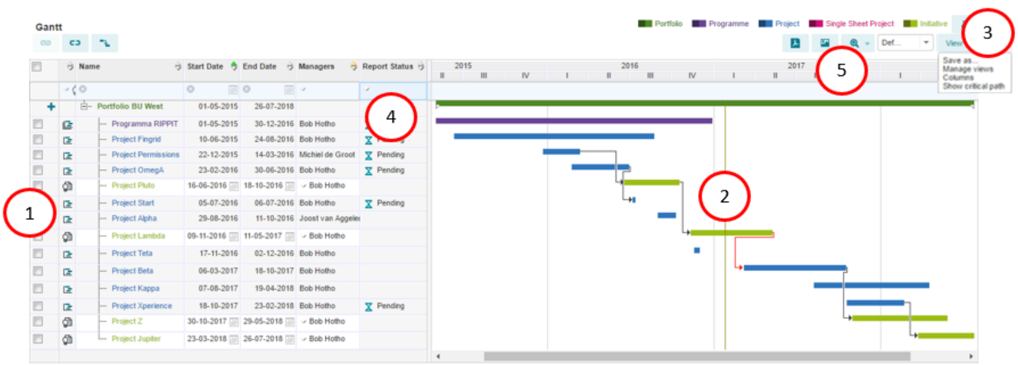
Please consult you administrator before making any changes to the financial configuration.

3. Set the current financial period, indicated in yellow in the grid below. This should be manually done each calendar or book year.
4. Click to edit the financial information. Which information you can edit depends on the financial configuration. Note that financial information can be edited only on category level.
5. Use these check boxes to determine which columns are shown in the financial grid.
6. Click on the + symbol in front of the project name to unfold the financial categories. This is the level on which you can edit information.
7. Archived projects are usually shown in red - again depending on the financial configuration.
8. The section Portfolio Item Totals shows financial information summed over all periods.
9. The financial information of the current financial period is shown in yellow.
10. This section shows financial information for successive financial periods.
11. The bottom row of the financial grid shows totals per column. Use the scroll bar to view the entire grid.

Note: see the **QRC Financial Configuration** on our support portal for detailed information about financial types and configuration options.

5.2.14 Working with the Portfolio Gantt

The Portfolio Gantt displays the planning of all portfolio-items in the portfolio. The legend indicates which items have which colour. This topic describes the functions of the Portfolio Gantt.



The Portfolio Gantt in edit mode

The main functions of the Portfolio Gantt are:

1. Click on the at the top of the first column to create a new Initiative. You can enter the name and planning directly in the Gantt.
   Note: you can edit information of Initiatives directly in the Gantt.
   Note: this function is only available in edit mode; click to switch to edit mode.
2. You can use click/drag/drop to enter dependencies between portfolio-items; alternatively you can select two portfolio-items (by using the check box in the first column) and then click the icon on the top left of the Gantt.
   Note: right click a dependency to edit it; alternatively can select a portfolio-item (with the check box) and then click the icon on the top left of the Gantt.
   Note: these functions are only available in edit mode; click to switch to edit mode.
   Note: dependencies between portfolio-items are set independently from dependencies between projects.
3. Click **View** and then:
   - click **Columns**, a pop-up appears: select which columns to show and click **OK**.
   - click **Save as..** to save a view for later use; the view will become available in the drop-down that shows the view name.
   - click **Mange views** to delete saved custom views.
   - click **Show critical path** to display the critical path in 'red' (if there is one).
4. There are several options to work with columns:
   - use drag and drop the change column widths and to change the order of columns.
   - click and drag the divider left of the Gantt bars to slide the Gantt bars 'over' the columns.
   - drag a column to the right of the divider to always keep it in view.
   - use the filter field at the top of the columns to filter rows.
     Note: the filter works on some but not all field types.
5. Click to print the Gantt as a PDF.
   Click to create an image of the Gantt.
   Click to zoom in/zoom out; alternatively left-click/right-click the date header above the Gantt bars.

5.2.15 Create a Dashboard Report

In a portfolio on the **tab Dashboard Report**, you can freely use widgets to visualise the portfolio in many ways. The resulting dashboard can be used for monitoring the portfolio and can be shared with stakeholders via the Principal Toolbox App (see Send the Dashboard Report to mobile devices of Stakeholders 99).

Create a Dashboard Report

Step 1. Navigate to a portfolio, to the tab **Dashboard Report**.

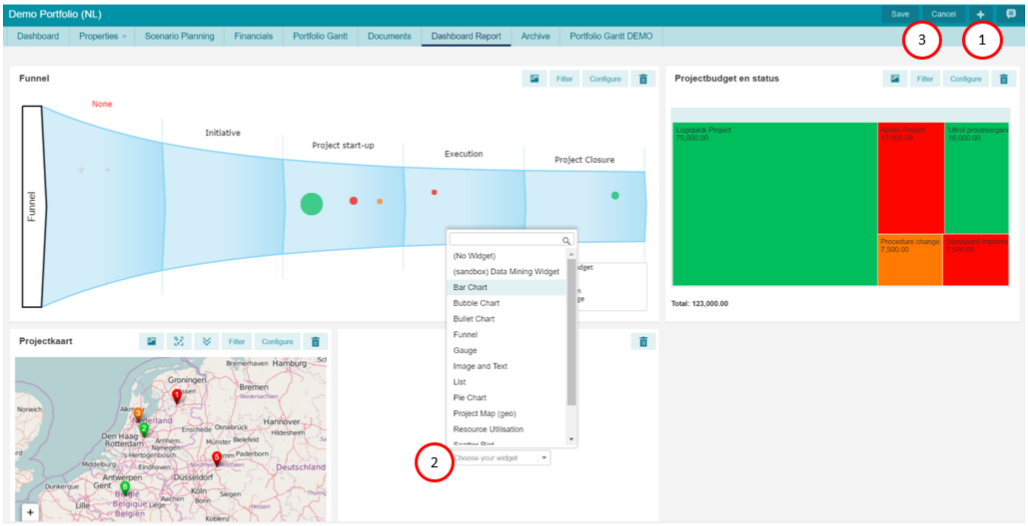
Step 2. Click and then to add widgets: 'empty' place holders are added to Dashboard Report.

Step 3. Click **Choose your widget** to determine each widget.

Step 4. Per widget click **Configure** to configure the widget. See Working with Widgets 31.

Step 5. Drag, drop and re-size the widgets on the page.

Step 6. When you're finished, Click **Save**.



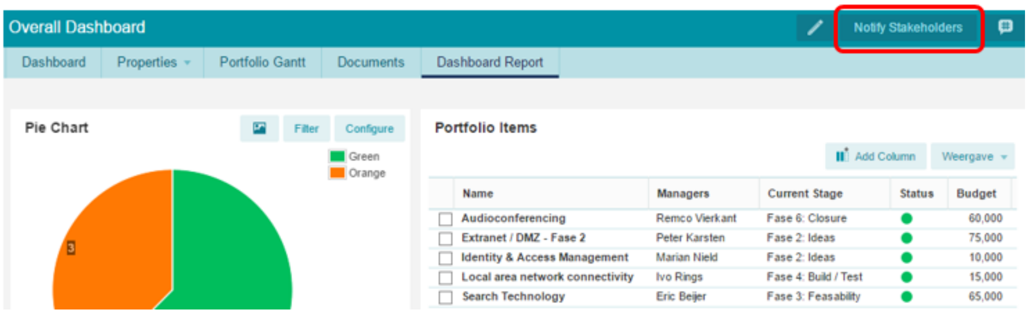
The tab Dashboard Report

<u>What you see on the tab Dashboard Report</u>

1) Click **+** to add widgets.
2) Click **Choose your Widget** to determine the type of widget.
3) Click **Save** or **Cancel** to save or cancel changes.

5.2.16 Send the Dashboard Report to mobile devices of stakeholders

You can send the Dashboard Report to the Principal Toolbox App. Your stakeholders can view the report on their mobile device.

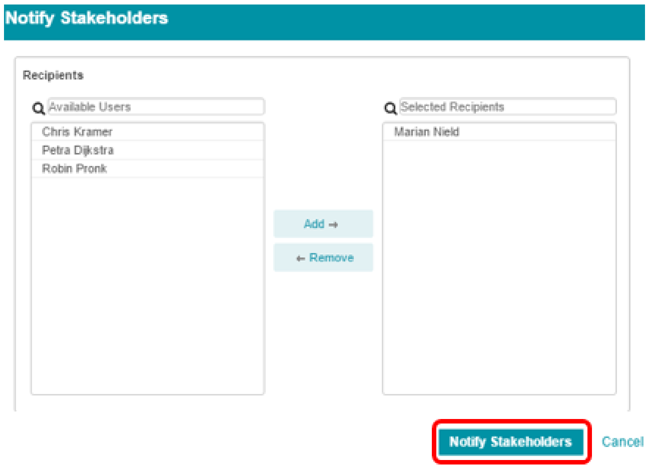


Custom Dashboard, tab Dashboard Report

<u>Notifying Stakeholders</u>

Step 1. In a portfolio, navigate to the tab **Dashboard Report**, click on **Notify Stakeholders**, a dialogue box appears.

Step 2. In the dialogue box enter remarks and add the stakeholders, click **Notify Stakeholders**; the notification is sent.



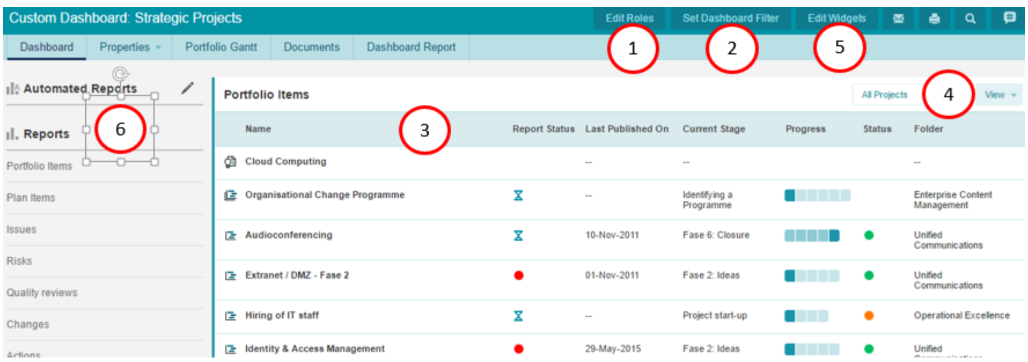
5.3 Working in a Custom Dashboard

In a Custom Dashboard several basic functions are available: Search 22, Messaging 68, Navigation 21, Working with widgets 31, Working with views 23, Working with the archive 67, Viewing the change history, 68 Working with roles 56, Document management 62.

Custom Dashboards can be used to view and report on any group of projects, irrespectively of the grouping in portfolios. Custom Dashboards are read-only. For more information in creating and archiving Custom Dashboards, see Create or archive a Custom Dashboard 87.

The main features of Custom Dashboards are:

- Give anyone read-access to any selection of projects, independent of your portfolios.
- Create and share widget based reports with stakeholders of any selection of projects. These can be viewed in the mobile app.



The Custom Dashboard Dashboard

What you see on the **Custom Dashboard Dashboard**

1. Click **Edit Roles** to give users access to the **Custom Dashboard**.
2. Click **Set Dashboard Filter** to define which projects are shown in this **Custom Dashboard**.
3. The list of projects that are shown in this **Custom Dashboard**.
4. Use views to define what information is shown on screen. See Working with views 23 .

5. Click **Edit Widgets** to add widgets in the top section of the dashboard. See Working with widgets 31.
6. A report section where you can report on any information in the **Custom Dashboard**.

The next topics cover all relevant use cases when working with Custom Dashboards.

5.3.1 Working with the Gantt (referral)

The Gantt in a Custom Dashboard works the same as the Gantt in a portfolio. The one difference is that a Custom Dashboard is 'read only': the edit functions that are available in the Portfolio Gantt do not apply. See Working with the Portfolio Gantt 97.

5.3.2 Create a Dashboard Report (referral)

The Dashboard Report in a Custom Dashboard works the same as in a portfolio. See Create a Dashboard Report 98.

5.3.3 Send the Dashboard Report to mobile devices of stakeholders (referral)

Sending the Dashboard Report to mobile devices from a Custom Dashboard works the same as from a portfolio. See Send the Dashboard Report to mobile devices of stakeholders 99.

Working with Project Management

6 Working with Project Management

Within the Project Management module several basic functions are available: Navigation 21, Search 22, Reporting 47, Working with views 23, Working with widgets 31, Document management 62, Messaging 68, Working with roles 56, Working with the archive 67, Creating items 53, Viewing the change history 68.

The Project Management module allows you to manage projects: doing the project right! The module supports project teams 'from project start to project finish'.

The main features of the Project Management module are:

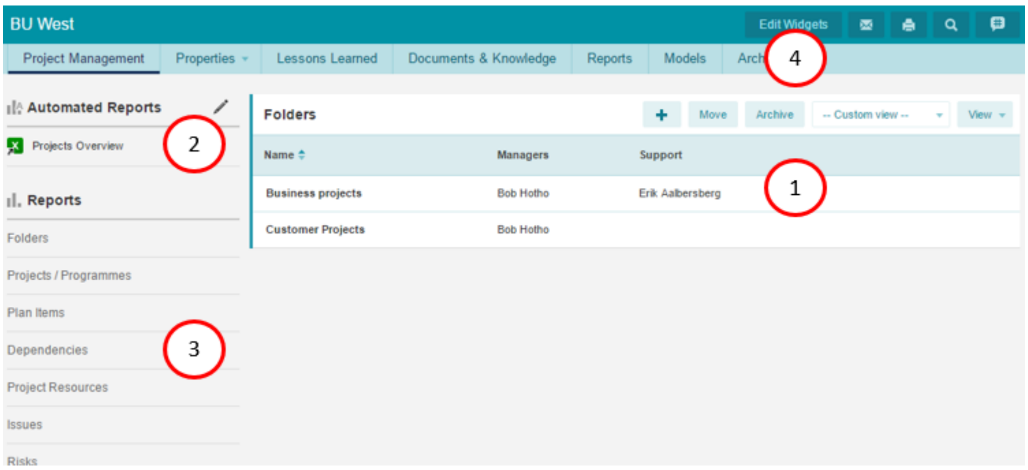
- Use folders to group projects
- Plan, manage and report on projects in time, resources, money, risks, quality, issues, scope and more
- Deviate from the project model configuration if necessary, i.e. set project specific role permissions
- Publish project information to the portfolio

The next topics cover all relevant use cases when working with Project Management.

6.1 Working with the Project Management dashboard

The Project Management Dashboard is the highest level of the Project Management module. The main features on the Portfolio Management Dashboard are:

? Navigate to a folder.
? Report on all information in all your projects.
? Create, move or archive a folder.



The Project Management Dashboard

<u>What you see on the Project Management Dashboard</u>

1. The section folders, where you can view create, move, archive or navigate to folders on this level:
   - Click + to create a new folder (option available depending on your role). See Create a Folder 133.
   - Select a folder row and then click **Move** to move the folder to another location (option available depending on your role). See Move a Folder 133.
   - Select a folder row and then click **Archive** to move the folder to the archive (option available depending on your role). See Archive a Folder 134.

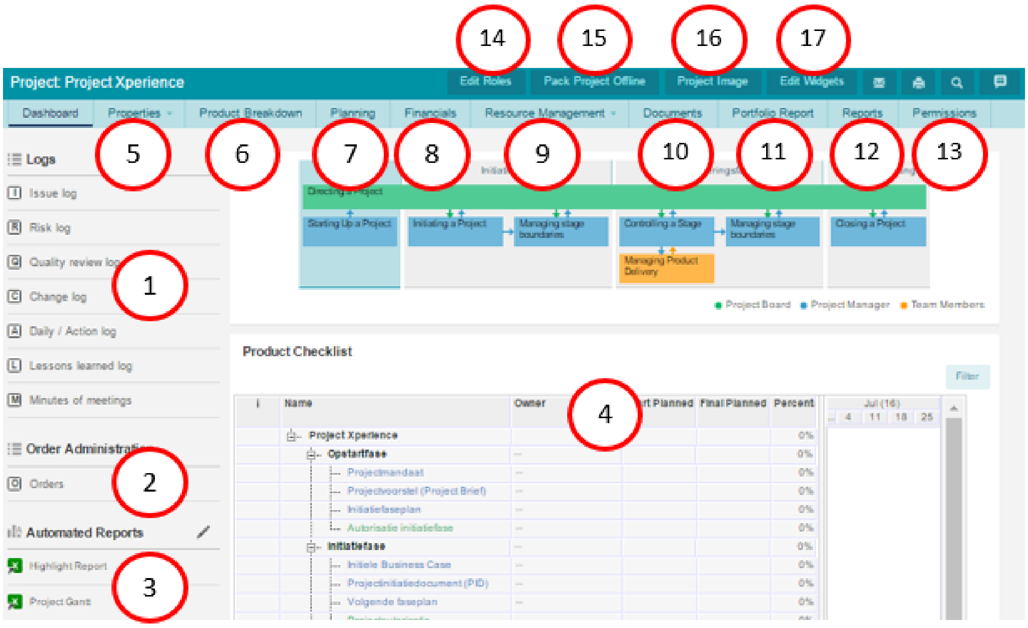
2. The section Automated Reports, where you can run or create Automated Reports (option available depending on your role).
3. The section Reports, where you can report on any information in projects (option available depending on your role). See Working with views 23.
4. Click **Edit Widgets** to add widgets in the top section of the dashboard. See Working with widgets 31.

6.2 Working in a Project

Within projects several basic functions are available: Search 22, Messaging 68, Reporting 47, Working with widgets 31, Working with views 23, Working with roles 56, Viewing the change history 68, Document management 62.

The main features of working in a project are:

- Plan, manage and report on your project on all relevant aspects.
- Apply project specific configuration, i.e. set project specific role permissions.
- Publish project information to the portfolio.



The project dashboard

What you see on the Project Dashboard

1. The **section Logs**, where you can create and manage log-items (available logs depend on your configuration). See Working with Logs 52.
2. The **Order log**, where you can create and manage orders (option available depending on your configuration). See Working with the Order log 127.
3. The **section Automated Reports**, where you can run or create Automated Reports (option available depending on your role). See Working with Automated Reports 47.
4. The **Product Checklist** gives a quick view of the project planning. The project manager can limit what is shown here by applying an filter (click on **Filter**).
5. On the **tab Properties** you can view and edit project information. See Edit the Properties of a Project 108.
6. On the **tab Product Breakdown** you can view the product breakdown as defined in the Gantt.
7. On the **tab Planning** you can view and edit the project planning in time, costs and resources. See Planning a Project 108.

8. On the **tab Financials** you can view and edit the financial grid, showing all project financials plotted over time (depending on your configuration). See Managing Costs with the Financial Grid 125.
9. On the **tab Resource Management** you can request hours, approve hours and set project specific hour rates. See Manage the Resources on your project 123
10. On the **tab Documents** you can view and add documents. See Document Management 62.
11. On the **tab Portfolio Report** you can publish information to the portfolio. See Publish to the Portfolio 128.
12. On the **tab Reports** you can report on any information of the project. See Reporting 47.
13. On the tab Permissions you can change the permissions of the project roles for your project (option available depending on your configuration). See Change permissions of Project roles 106.
14. Click **Edit Roles** to view or edit the roles on your project. See Working with Roles 56.
15. Click **Pack Project Offline** to export your project as an HTML-file. See Pack Project Offline 129.
16. Click **Project Image** to add an image to your project dashboard.
17. Click **Edit Widgets** to add widgets in the top section of this dashboard. See Working with widgets 31.

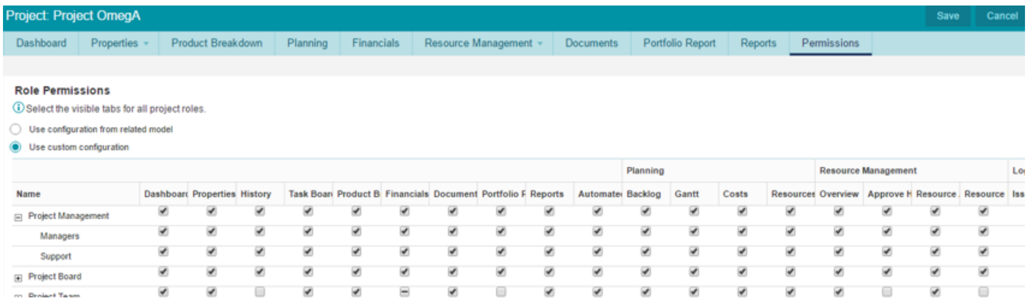
The next topics cover all relevant use cases when working in a project.

6.2.1 Configure your Project

Depending on your configuration the Project Manager is able to change some of the settings for his project. If the configuration allows it he can change the permissions of the roles in his project, set hour rates for resources in his project and link extra Resource Pools to his project.

6.2.1.1 Edit permissions of Project roles

Depending on the configuration (of the project model) the Project Manager can change the permissions of the roles in his project. The Project Manager can define per role which tabs, sub-tabs and logs to hide or show.



Tab Permissions

<u>Edit permissions of Project roles</u>

Step 1. Navigate to your project, to the **tab Permissions**, click .
Step 2. On the top of the page, select **Use custom configuration**.
Step 3. Check or uncheck the boxes in the matrix to hide or show tab, sub-tabs and logs per role. Click on the '+' symbol on the left side to unfold grouped roles to

individual roles.

Step 4. When your done, click **Save** to apply the changes.

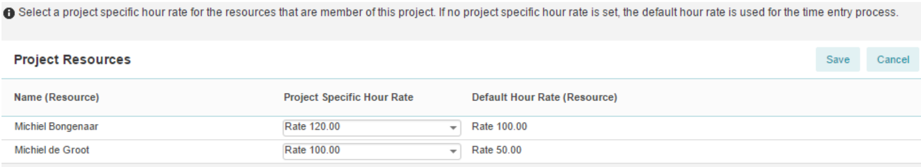
Note: permissions can only be edited for project roles and roles with inherited access to the project. An administrator will see all tabs, sub-tabs and logs.

6.2.1.2 Set Project specific hour rates

Depending on your configuration the Project Manager can deviate from the default hour rates and set project specific hour rates for the resources in his project.

<u>Set project specific hour rates</u>

Step 1. Navigate to your project, to the **tab Resource Management**, **sub-tab Resource Rates**, and click .


Select a project specific hour rate for the resources that are member of this project. If no project specific hour rate is set, the default hour rate is used for the time entry process.

Project Resources   Save   Cancel

Name (Resource)	Project Specific Hour Rate	Default Hour Rate (Resource)
Michiel Bongenaar	Rate 120.00	Rate 100.00
Michiel de Groot	Rate 100.00	Rate 50.00

Set project specific hour rates

Step 2. In the **section Project Resources**, enter the project specific hour rates, and click **Save**.

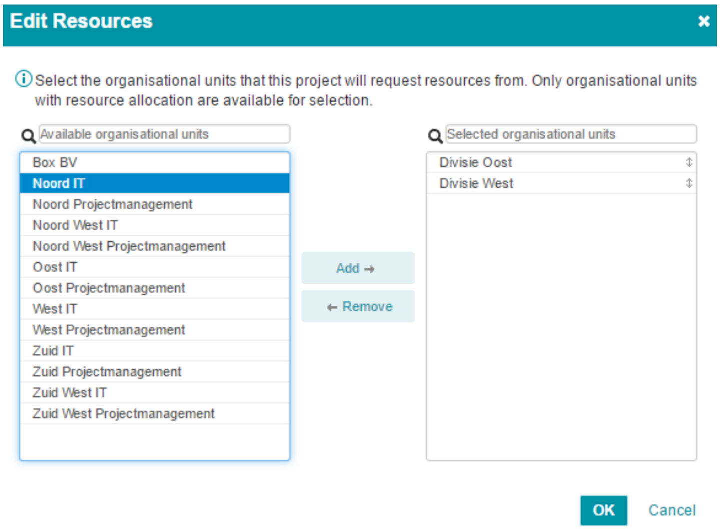
Note: Project specific hour rates can only be set for users with a project role.

Note: Project specific hour rates are active from the moment of saving and have no effect on costs of hours in the past.

6.2.1.3 Link a Resource Pool to your project

In Principal Toolbox resources are usually grouped in resource pools. When planning hours in your project you can limit the resources you can plan by linking resource pools to your project. This is especially helpful when many resources exist. Usually the most obvious resource pools have already been linked to your project when the project was started. If necessary you can link extra resource pools to your project. If no resource pools are linked to your project you will be able to plan all existing resources.

Step 1. Navigate to your project, to the tab **Resource Management**, **sub-tab Overview** or **sub-tab Resource Allocation**, click **Edit Resources**, a pop-up appears:



Pop-up Edit Resources

Step 2. Use drag and drop to add or remove resource pools or select one or more resource pools and click **Add** or **Remove**.
Step 3. Click **OK** to save the changes.

6.2.2 Working with the tab Properties

The **tab Properties** typically contains project information. The lay-out of this page is configured by your system administrator. On this page you can view the project information and (depending on your role) edit it.

Edit information on the tab Properties
Step 1. Navigate to your project, to the **tab Properties**, and click .
Step 2. Edit the fields and click on **Save**.
Note: which fields are available depends on your configuration.
Note: fields marked with * are required fields and have to be entered before you can save.

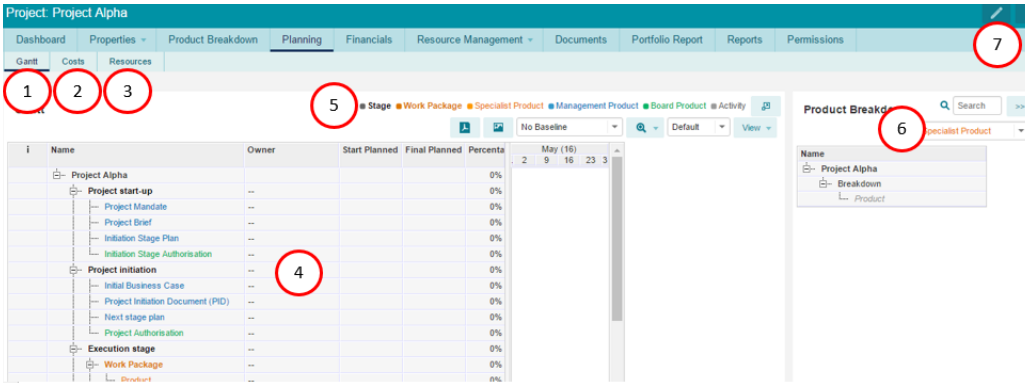
6.2.3 Working with Logs in a Project

Every project has seven logs: an **Issue Log**, a **Risk Log**, a **Quality Review Log**, a **Change Log**, a **Daily/Action Log**, a **Lessons Learned** Log and the log **Minutes of Meeting**. These logs can be used to manage the issues, risks, quality, change, actions and lessons learned of a project. A project can move log items to another project in the same folder or escalate them to folder level.

For more information see Working with Logs 52.

6.2.4 Planning a Project: working with the Gantt

Every project that is started in the Principal Toolbox is based on a Project Model. Every project will therefore have some kind of basic or standard planning. That planning can be viewed and edited in the project Gantt. The project Gantt has three sub-tabs for planning time, costs and resources.



The project Gantt

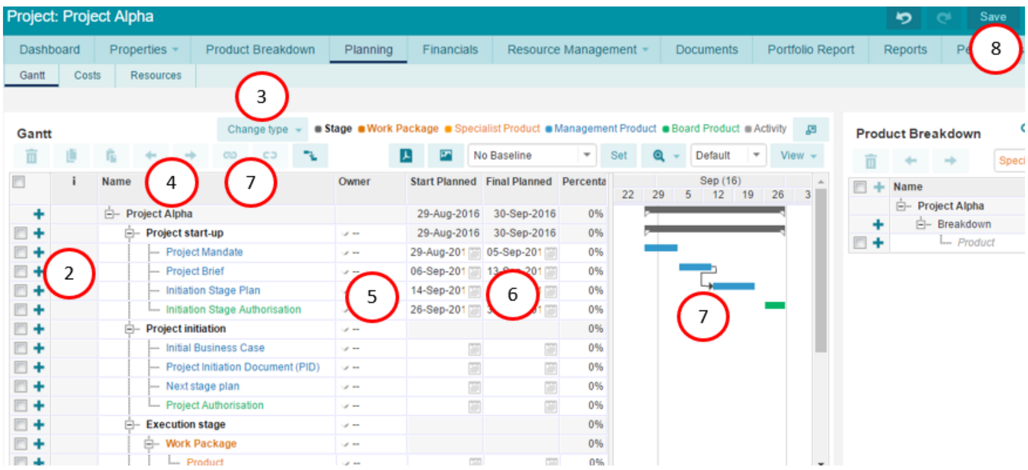
<u>What you see on the tab Planning</u>

1. The **sub-tab Gantt**, where you can view and edit the project (time) planning.
2. The **sub-tab Costs**, where you can view and edit the project cost planning.
3. The **sub-tab Resources**, where you can view and edit the project resource planning.
4. The project Gantt, containing plan-items of different types: stages, work packages, products and activities.
5. The legend for the plan-item types: which type has which colour.
6. The **section Product Breakdown**, which contains all plan-items in the project, whether they are planned in the Gantt or not. The Product Breakdown can contain a library of plan-items and can be used to add a hierarchy to plan-items. See <u>Working with the Product Breakdown</u> 113.
7. Click to switch to the edit mode.

The next topics cover all relevant use cases when planning a project with the Gantt.

6.2.4.1 Plan a Project with the Gantt chart

Every project that is started in the Principal Toolbox is based on a Project Model. Every project will therefore have some kind of basic or standard planning. The Project Manager will change that standard planning to a project specific planning. This topic describes all aspects of editing the planning in the Gantt. See other topics for <u>Planning Resources and Skills with the Gantt</u> 115 or <u>Planning Costs with the Gantt</u> 116.



Edit the project planning in the Gantt

<u>Edit the project planning</u>

Step 1. Navigate to your project to the **tab Planning**, sub-tab **Gantt** and click , the

Gantt changes to edit mode.

Step 2. To add plan-items to the Gantt, click , a new plan-item is inserted in the Gantt. Enter a name for the new plan-item.
Note: you can also drag-and-drop plan-items from the **section Product Breakdown**. See Working with the Product Breakdown 113.

Step 3. Depending on which you clicked you create a stage, a specialist product or an activity. To change the type of a plan-item, select the plan-item row, and click **Change type** and select the desired type.

Step 4. To change the indentation of a plan-item, select the plan-item row and click one of the arrows: .

Step 5. Optionally enter an owner for a plan-item. An owner of a plan-item will see the plan-item on his Home Page, and is able to edit information of that plan-item (but not the planning!). See Working with plan-items 117.
Note: if you make somebody owner of a work package, that person will be able to edit the planning of that work package. See Plan a Work Package (by a Project Team Member 111).

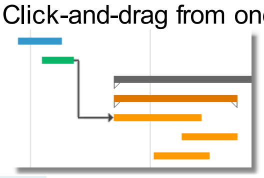
Step 6. There are different ways you can enter a time planning in the columns **Start planned** and **Final planned**:

- Click in a cell in one of the columns and directly enter dates.
- Click on in one of the cells and use the calendar to enter dates.
- Click-and-drag a bar directly in the Gantt chart.

There are different ways you can enter dependencies to your planning:

In the Gantt

Step 7. Click-and-drag from one bar to another bar.

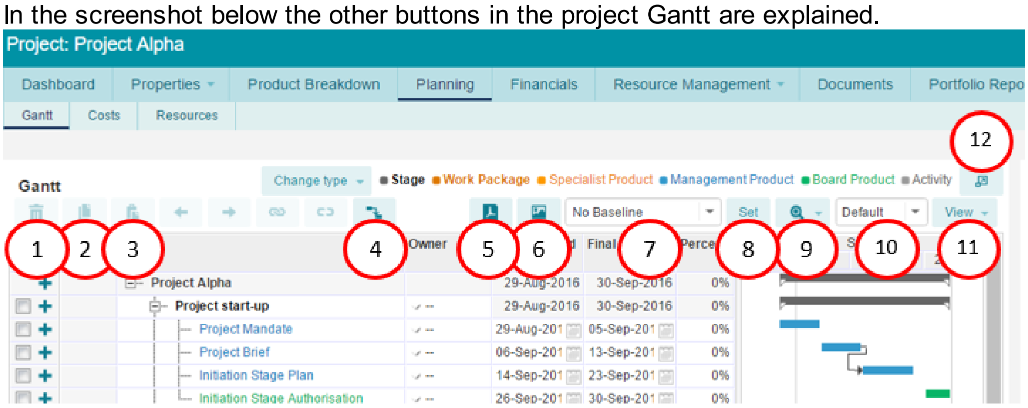


With the -button

Step 7. Select two plan-item rows and click . Select multiple rows by using **Ctrl +click**, **Shift+click** or by flagging them.
Note: to change a dependency right-click the dependency line in the Gantt chart, or navigate to the plan-item page, tab **Dependencies**.
Note: to remove a dependency select the two plan-item rows and click .
Note: dependencies to other projects can be entered on the plan-item page, tab **Dependencies**. See Working with dependencies on plan-items 121.

Step 8. When the planning is finished, click **Save**.

In the screenshot below the other buttons in the project Gantt are explained.



Edit the project planning in the Gantt

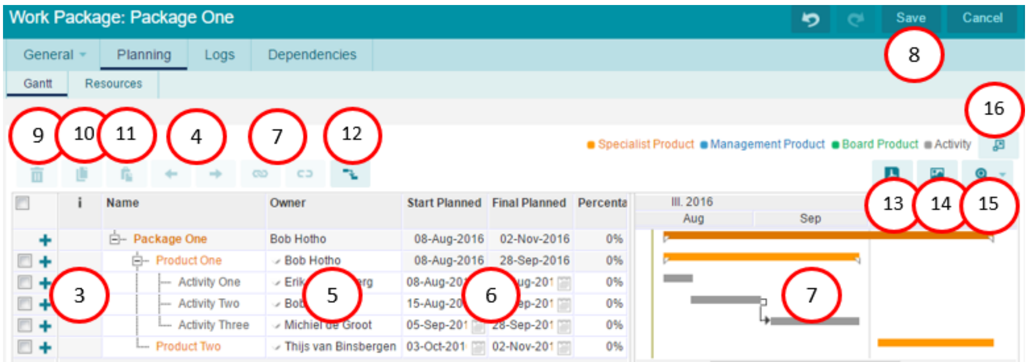
1. Remove selected plan-item rows (select multiple rows by using **Ctrl+click**, **Shift**

+click or by flagging them).
2. Copy selected plan-item rows.
3. Paste selected plan-item rows.
4. Resolve conflicts that result from dependencies.
5. Print the Gantt as a PDF file. The PDF will look like the Gantt as it is displayed on screen.
6. Create an image of the Gantt. The image will look like the Gantt as it is displayed on screen.
7. Select if/which baseline to show (next to the planning).
8. Click **Set** to set a baseline; choose **Initial baseline** or **Current baseline**.
9. Adjust the scale of the Gantt: zoom in/out, zoom fit.
   Note: you can also adjust the scale of the Gantt by left-/right-clicking the date header of the Gantt chart.
10. Choose one of the available views.
11. Edit the Gantt view and save views for later use:
    - Click **View**, click **Columns** and in the pop-up select which columns you want to show on screen, click **OK**.
    - Drag-and-drop the displayed column to change their order and width.
      Note: it is possible to drag columns to the right-side of the divider.
    - Click **View**, click **Save as** and in the pop-up enter a name for the view or select an existing view to overwrite, click **Save View**.
    - Click **View**, click **Manage Views** to delete earlier saved views.
    - Click **View**, click **Show critical path** to display the critical path
12. Click to enlarge the Gantt to a full screen view.

6.2.4.2 Plan a Workpackage (by a Project Team Member)

A Project Manager can delegate the planning of a work package to a Project Team Member by assigning an owner to the work package. The owner of a work package can:

- Plan the work package in time: add and plan products and activities. See below.
- Plan resources and skills on products and activities. See below.
- Create log items on products and activities. See Working with logs 52.
- Add dependencies to products and activities. See Working with dependencies on plan-items 121.



Edit the work package planning, sub-tab Gantt

<u>Plan the work package (in the time)</u>

Step 1. Navigate to the work package via your **Home Page** or by clicking the work package in the project Gantt,a pop-up appears.

Step 2. Navigate to the tab **Planning**, **sub-tab Gantt**, and click .

Step 3. To add plan-items to the Gantt, click , a new plan-item is inserted in the Gantt. Enter a name for the new plan-item.
Note: depending on which you clicked you create a specialist product or an activity.

Step 4. To change the indentation of a plan-item, select the plan-item row and click one of the arrows: .

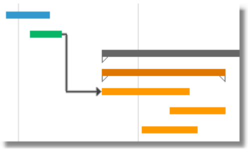
Step 5. Optionally enter an owner for a plan-item. An owner of a plan-item will see the plan-item on his Home Page, and is able to edit information of that plan-item (but not the planning!). See Working with plan-items 117.

Step 6. There are different ways you can enter a time planning in the columns **Start planned** and **Final planned**:

- Click in a cell in one of the columns and directly enter dates.
- Click on in one of the cells and use the calendar to enter dates.
- Click-and-drag a bar directly in the Gantt chart.

Step 7. There are different ways you can enter dependencies to your planning:

- Click-and-drag from one bar to another bar.



- Select two plan-item rows and click . Select multiple rows by using **Ctrl+click**, **Shift+click** or by flagging them.
  Note: to change a dependency right-click the dependency line in the Gantt chart, or navigate to the plan-item page, tab **Dependencies**.
  Note: to remove a dependency select the two plan-item rows and click .
  Note: dependencies to other projects can be entered on the **tab Dependencies**. See Working with dependencies on plan-items 121.

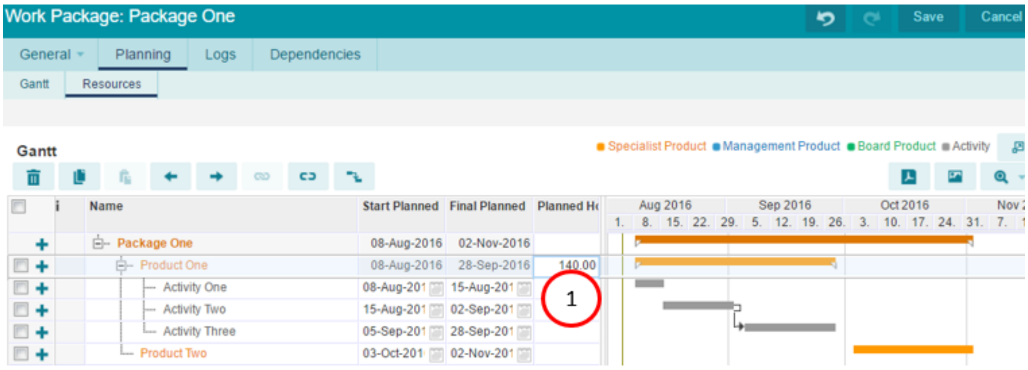
Step 8. When the planning is finished, click **Save**

Below the other buttons in the work package Gantt are explained.

9. Remove selected plan-item rows (select multiple rows by using **Ctrl+click**, **Shift+click** or by flagging them).
10. Copy selected plan-item rows.
11. Paste selected plan-item rows.
12. Resolve conflicts that result from dependencies.
13. Print the Gantt as a PDF file.The PDF will look like the Gantt as it is displayed on screen.
14. Create an image of the Gantt. The image will look like the Gantt as it is displayed on screen.
15. Adjust the scale of the Gantt: zoom in/out, zoom fit.
    Note: you can also adjust the scale of the Gantt by left-/right-clicking the date header of the Gantt chart.
16. Click to enlarge the Gantt to a full screen view.

As of version 9.5.0.9. work package owners can edit plan-item information on the detail pages of the plan-items. To navigate to the detail page of a plan-item, click on the name of the plan-item in the (work package) Gantt. For more information on how to edit plan-item data, see View or edit plan-item data 117.

![FORTES logo]



Edit the work package planning, sub-tab Resources

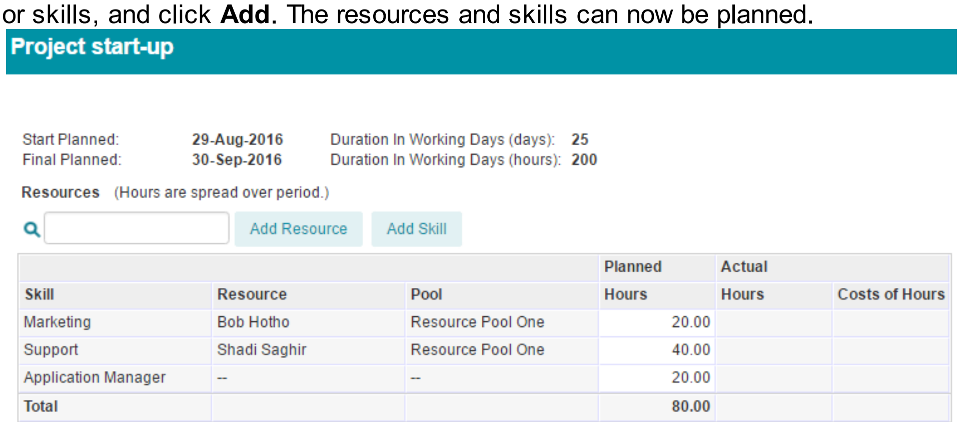
<u>Plan resources or skills on the work package</u>

Step 1. Navigate to the work package via your **Home Page** or by clicking the work package in the project Gantt,a pop-up appears.

Step 2. Navigate to the **tab Planning**, **sub-tab Resources**, and click ✎.

Step 3. In a plan-item row, double click the field in the column **Planned Hours**, a dialogue box appears.

Step 4. Click **Add Resource** or **Add Skill**, in the pop-up select the desired resources or skills, and click **Add**. The resources and skills can now be planned.



Skill	Resource	Pool	Planned Hours	Actual Hours	Costs of Hours
Marketing	Bob Hotho	Resource Pool One	20.00		
Support	Shadi Saghir	Resource Pool One	40.00		
Application Manager	--	--	20.00		
Total			80.00		

Dialogue plan Resources and Skills

Step 5. In a row, click on the field in the **Planned Hours** column and enter the amounts.

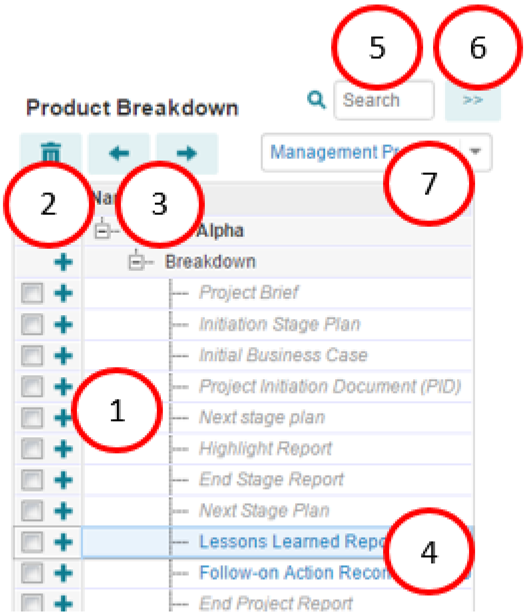
Step 6. When your finished, click **OK**

6.2.4.3 Working with the Product Breakdown

A project planning is typically a product planning. In your project in the **tab Planning** all products in your project are shown in the **section Product Breakdown**. This product breakdown contains both planned products (that are in the Gantt), and not planned product (that are not in the Gantt). The main functions of the product breakdown are:

- Drag-and-drop products to or from the Gantt.
- Create new products.
- Delete product from the project entirely.
  Note: if you delete a product from the Gantt, it still exists in the product breakdown.
- Add a hierarchy to the products.
- It can be used as a product library (it should then be pre-filled in the Project Model).

The product breakdown is visualised on the project tab **Product Breakdown** (see below)



The section Product Breakdown in the project tab Planning. sub-tab Gantt

Working with the Product Breakdown

Navigate to the project Gantt and click .

Step 1. Click to add a new product and enter a name.

Step 2. Select a row and click to delete the product from the project.

Step 3. To add hierarchy, select one or more rows and click one of the arrows: .

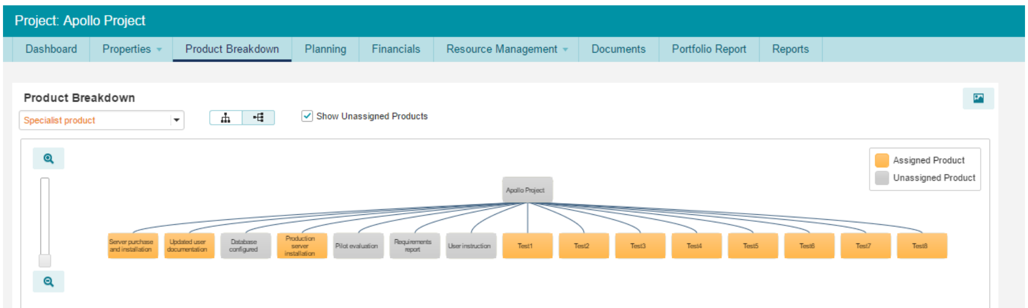
Note: you can also use drag-and-drop to add hierarchy.

Step 4. Products that are in the breakdown, but not in the Gantt, are shown in colour.

Step 5. You can use the search box to find products.

Step 6. Click to hide the product breakdown on the screen.

Step 7. Use this drop down list to switch between specials, management and board products.

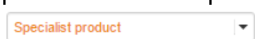


Project tab Product Breakdown

View the Product Breakdown

Navigate to the **tab Product Breakdown**. Products that are not planned in the Gantt ('unassigned products') are shown in grey. Products that are planned in the Gantt are shown in colour. The Product Breakdown has the following options:

Step 1. Click the drop down list to select the type of the product to show:



Step 2. Zoom in and out (to the left of your screen)

Step 3. Show or hide the unassigned products

Step 4. Show the product breakdown vertical or horizontal

Step 5. Click to save the breakdown as an image.

6.2.4.4 Plan Resources and Skills with the Gantt chart

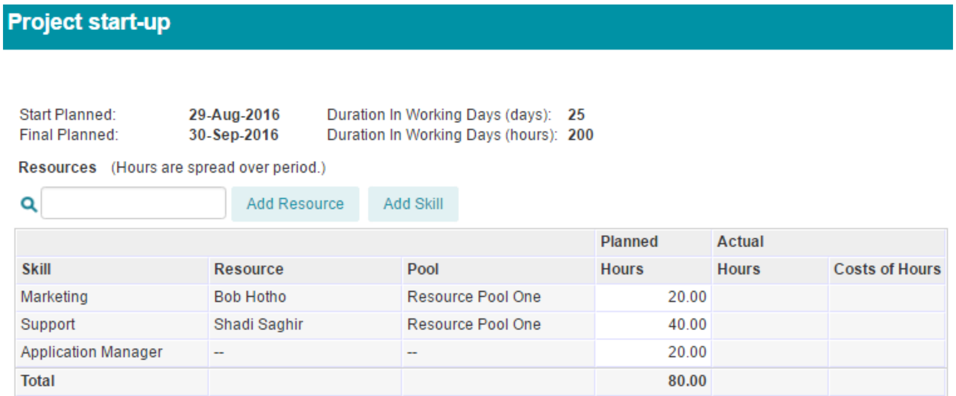
This topic describes all aspects of planning resources and skills with the Gantt. See other topics for Plan a Project with the Gantt 109 or Planning Costs with the Gantt 116.

Plan hours of resources and skills

Step 1. Navigate to your project, **tab Planning**, **sub-tab Resources**, and click .

Step 2. In the appropriate plan-item row, double click the field in the **column Planned Hours**, a dialogue box appears.

Step 3. Click **Add Resource** or **Add Skill**. In the pop-up select the desired resources and/or skills and click **Add**. The resources and skills can now be planned. Note: If a resource is a member of only one resource pool, the resource pool is automatically filled; if he is a member of more then one resource pool, the Project Manager must manually enter which resource pool applies. See Working with the Resource Summary 115.



Skill	Resource	Pool	Planned Hours	Actual Hours	Costs of Hours
Marketing	Bob Hotho	Resource Pool One	20.00		
Support	Shadi Saghir	Resource Pool One	40.00		
Application Manager	--	--	20.00		
Total			80.00		

Dialogue plan Resources and Skills

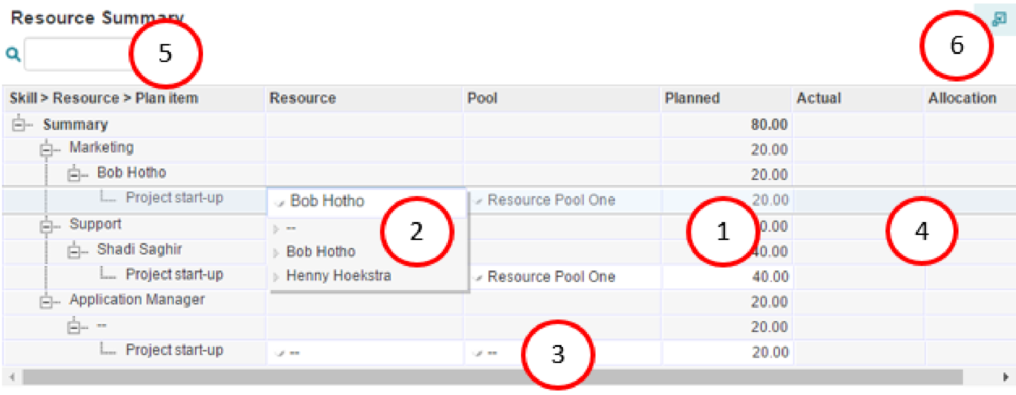
Step 4. Next, in a row, click on the field in the **Planned Hours** column and enter the amounts.

Step 5. When your finished, click **OK**,the dialogue box disappears.

Step 6. Repeat this for all appropriate plan-items. When your done, click **Save** to save all changes and leave the edit mode.

6.2.4.5 Working with the Resource summary

If you have planned hours on resources or skills in the Gantt, the **Resource Summary** will give you an overview of all planned hours. The **Resource Summary** also shows allocated and actual hours, if applicable. It can also be used to link resources or skills to the correct resource pool - this is necessary in order to be able to request and allocate resources. See Working with the Resource Grid 123 and Working with Resource Management 144.



The Resource Summary

What you can do in the Resource Summary

Step 1. View or change the planned hours on a plan-item.

Step 2. View or change the planned resource on a plan-item.

Step 3. Apply the correct resource pool for planned hours on skills, and for resources that are a member of more than one resource pool.

Note: this is necessary in order to be able to request and allocate resources

Step 4. These columns show the allocated and actual hours if applicable and depending on the configuration.

Step 5. Use the search box to filter on a specific resource or skill.

Step 6. Click to enlarge the Resource Summary to a full screen view.

6.2.4.6 Plan Costs with the Gantt chart

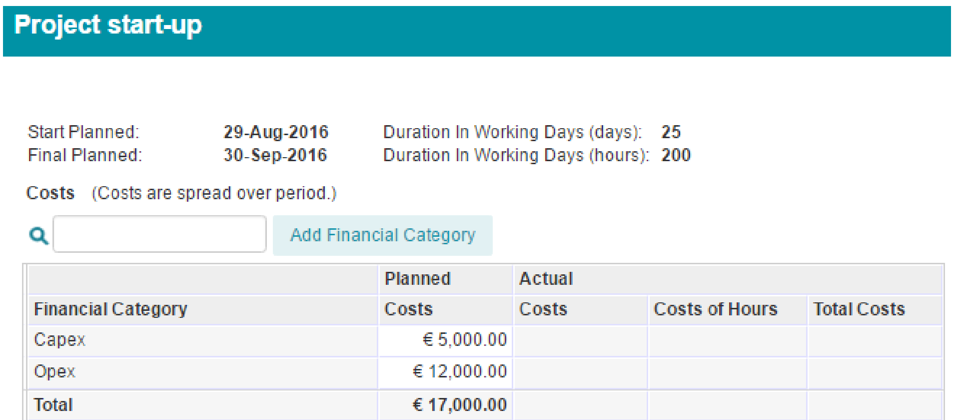
This topic describes all aspects of planning Costs with the Gantt. Whether you can actually do this depends on your configuration. See other topics for Plan a Project with the Gantt 109, or Planning Resources and Skills with the Gantt 115.

Plan Costs with the Gantt

Step 1. Navigate to your project, **tab Planning**, **sub-tab Costs**, and click .

Step 2. In the appropriate plan-item row, double click the field in the **column Total Planned Costs**, a dialogue box appears.

Step 3. Click **Add Financial Category**. In the pop-up select the desired categories and click **Add**. The costs can now be planned.



Financial Category	Planned Costs	Actual Costs	Costs of Hours	Total Costs
Capex	€ 5,000.00			
Opex	€ 12,000.00			
Total	€ 17,000.00			

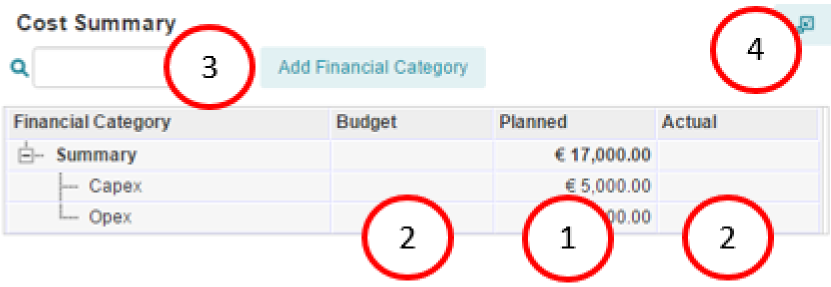
Dialogue plan Costs

Step 4. Next, in a row, click on the field in the **Planned Costs** column and enter the amounts.

Step 5. When your finished, click **OK**,the dialogue box disappears.
Step 6. Repeat this for all appropriate plan-items. When your done, click **Save** to save all changes and leave the edit mode.

6.2.4.7 Working with the Cost Summary

If you have planned costs with the Gantt, the **Cost Summary** will give you an overview of all planned costs. The **Cost Summary** also shows the budget and actual costs, if applicable. See also Manage Costs on your Project 125.



The Cost Summary

<u>What you can do in the Cost Summary</u>

1. View the total planned costs per financial category.
2. View the total budget and actual costs per financial category (if applicable).
3. Use the search box to filter on a specific financial category.
4. Click to enlarge the Cost Summary to a full screen view.

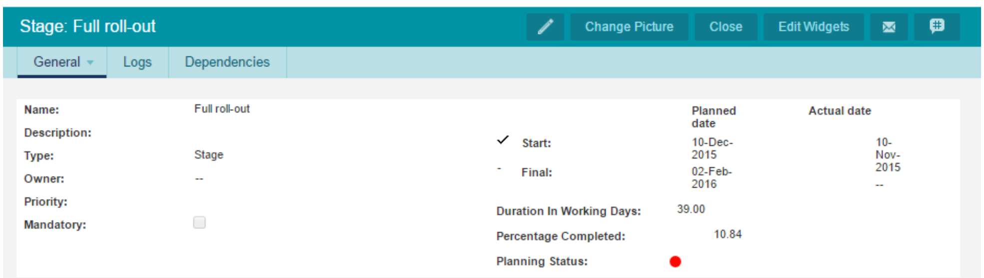
6.2.5 Working with plan-items

Every Project starts with a pre-defined set of plan items. These plan-items are set up in the Project Model. Once a project has been created in the Principal Toolbox, the Project Manager can add and change plan-items, add documents, request approval, add log-items and add dependencies. The next topics cover these functions.

6.2.5.1 View or edit plan-item data

As a Project Manager or a Product Owner it is possible to view or edit plan-item data. This can be done in two ways.

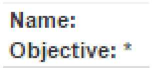
1. Click on the name of the plan-item, and in the pop-up click . Edit the data of the Plan-item.



A plan item details page

2. Add the columns needed in the Gantt by clicking View and select Column. See

also [Working with views] 23. Click and fill in the data of the plan item. Note that the screen width is adjustable by clicking on the edge between the Gantt and the plan item columns.



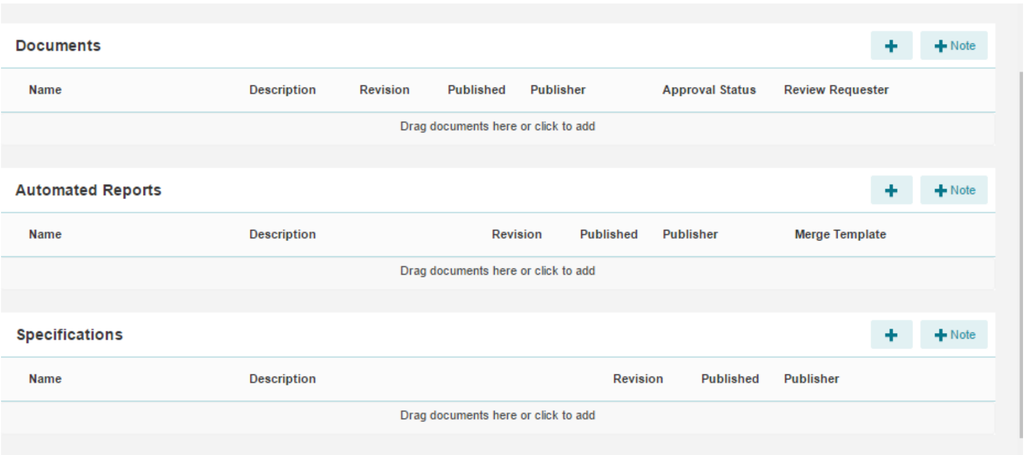
Required fields (e.g. on the **tab Properties** or on a log-item-page) are marked with a *. Pages with required fields on them can only be saved when those fields have been entered.

Note: The behavior of planning fields in the plan-item data can depend on other fields. The fields 'Start Actual', 'Final Actual' and 'Percentage Complete' can be set manually. However, when a value is entered at 'Percentage Complete' the system will set 'Start Actual' to today if no value had been entered. When the value entered is 100% the system will set 'Final Actual' to today.

When the check boxes for Start ('Start status') or Final ('Final status') are checked, respectively the fields 'Start Actual' or 'Final Actual' are set to today.
If no date was entered at 'Start Actual', checking 'Final Status' will set 'Start Actual' to today and check the box of 'Start status' as well.

6.2.5.2 Working with documents on plan items

As a Project Manager or a Product Owner it is possible to add different type of documents.
To do this click on a Plan-item to open the detail page. On the bottom of the page you find three sections to add documents. See screenshot below



Document section for Plan-item

- **Documents** Section

In the area **Documents** you can add documents to the **Plan-item**. It is also possible to start a document approval. See for more information [Request document approval] 64.

- **Automated Reports** Section

In the area **Automated Reports** you can add reports to the **Plan-item.** See [Working with Automated reports] 47

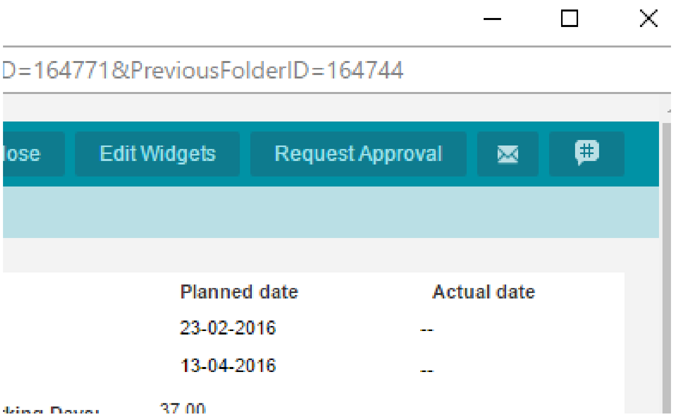
- **Specifications** Section

In the area **Specifications** you can add documents regarding the specifications of your plan-item.

6.2.5.3 Request plan-item approval

Note: This function is available depending on the configuration of the project model.

As a Project Manager or a Product Owner it is possible to request approval on a **Plan-item**. When this is configured you will find the button **Request Approval** in the top right of the plan-item details page (navigate to the details page by clicking on the name of the plan-item).



Plan-item with approval

How to request plan-item approval:

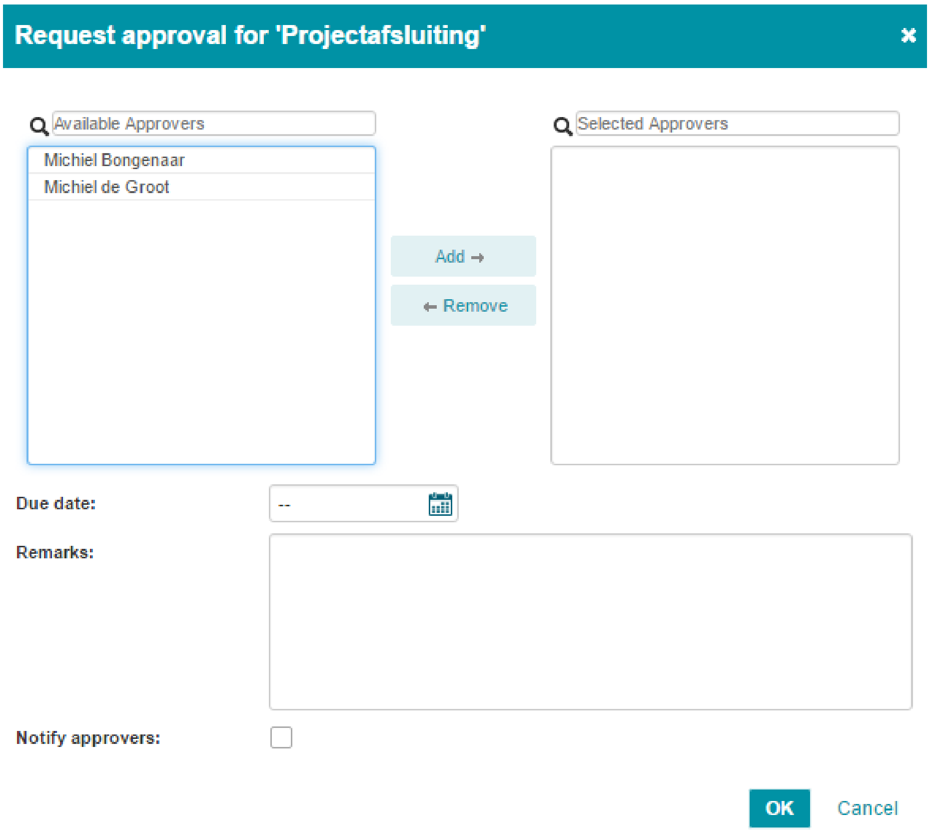
Step 1. In the plan-item details page, click on **Request Approval**, a pop-up appears

Step 2. Select the Approvers

Step 3. Enter a Due Date

Step 4. Optionally add a remark and/or check the option **Notify Approvers**

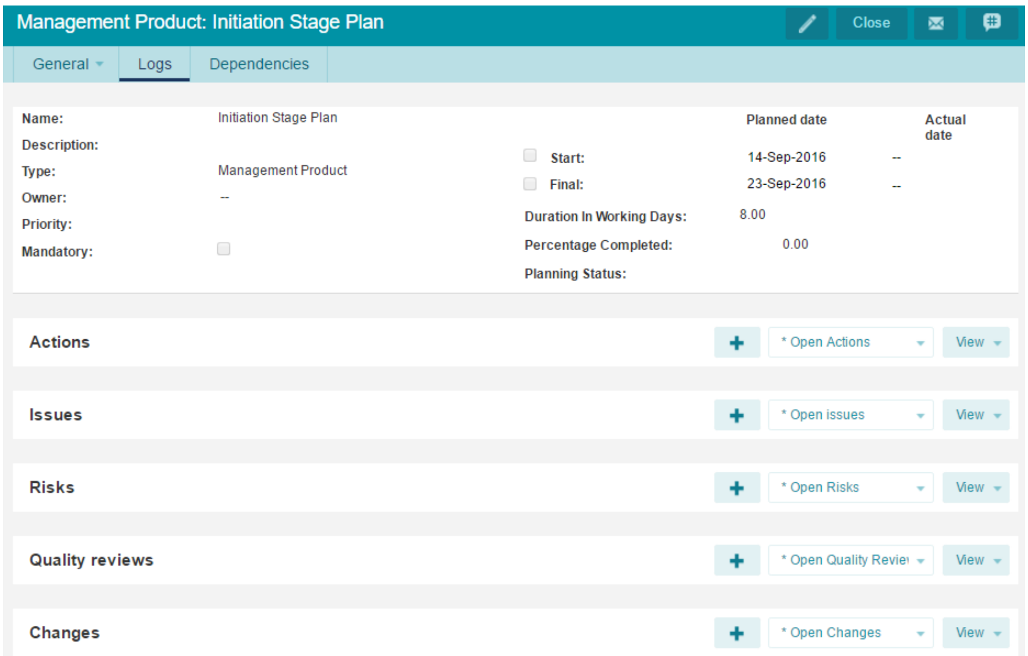
Step 5. Click **OK**.



Pop-up for requesting plan-item approval

6.2.5.4 Working with log-items on plan-items

The Project Manager and the owner of a plan-item can add log items to a plan-item. This can be done on the plan-item **tab Logs**. For more information on working with this tab, see Working with Logs 52 and Working with Views 23.



Plan-item tab Logs

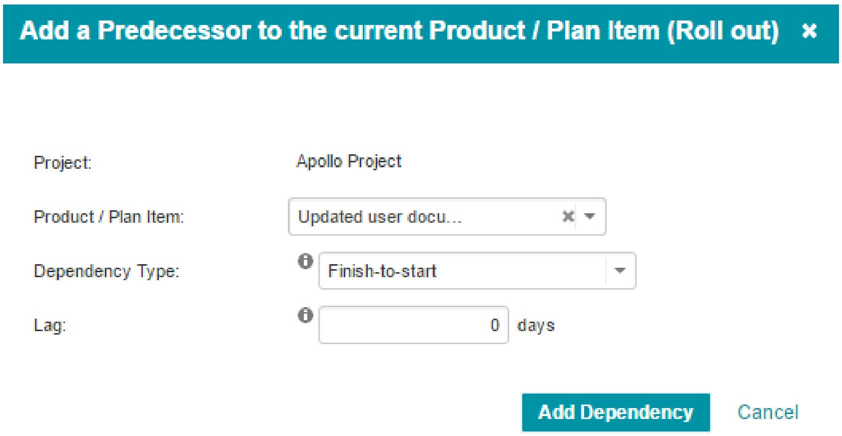
6.2.5.5 Working with dependencies on plan-items

As a Project Manager or a Product Owner it is possible to add **Dependencies** on a **Plan-item.**
There are two ways to do this

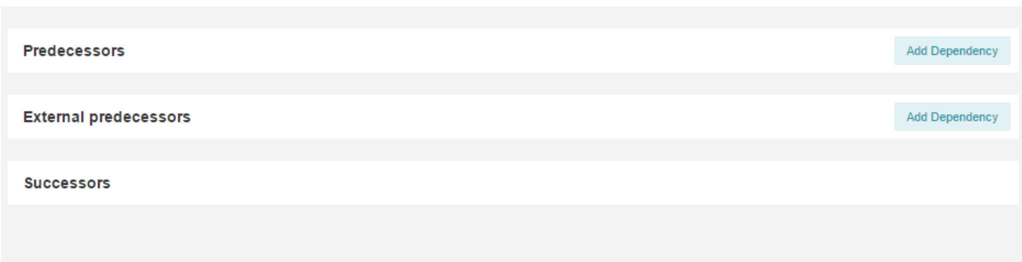
<u>Add **Dependency** in detail page of the **Plan-item**</u>

1. Go to the tab **Dependencies**
2. Click **Add Dependency**
3. Select the **Predecessor** and the **Dependency Type** and optional a **Lag.**
4. Click **Add Dependency**
5. You can also add external dependencies in the lower section.

Note: You can only add external dependencies to Projects in which you have the role Project Manager or Project Support.
Note: If you want add external dependencies, this is the only way to do it.



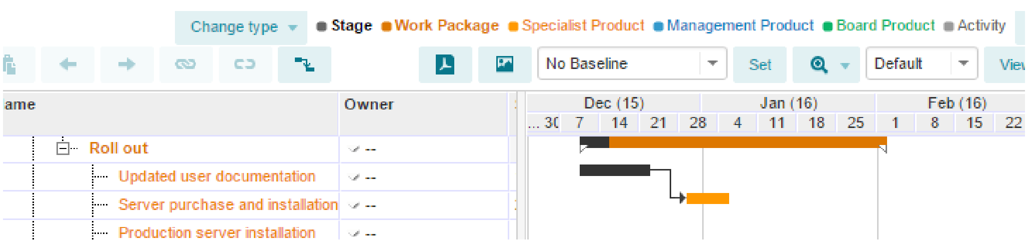
Example dependency



Detail screen to add dependency

<u>Add **Dependency** in the Gantt</u>

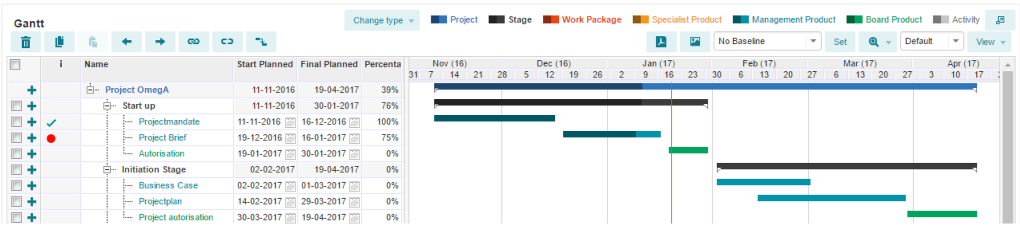
1. Click the bar of a Plan-item in the Gantt Chart and drag it to another bar of a plan Item
2. Right click the arrow to adjust the dependency



Example Dependency in the Gantt

6.2.6 Manage the Project planning

In the **tab Planning** you can manage the planning of your project. The **tab Planning** contains three **subtabs: Gantt, Costs** and **Resources**. This topic explains how to work with the Gantt. For the other subtabs see Manage the Resources on your project 123 and Manage Costs on your Project 125



Example of a Gantt chart

Working with the Project Gantt

Step 1. Go to the **Planning tab**, **subtab Gantt** and click to edit the planning.
Tip: click to enlarge the Gantt to full screen.

Step 2. Click to add plan-items. Enter a name on the appearing row. Plan-items directly appear in the product breakdown (on the right side of the Gantt).

Step 3. You can move a plan-item by dragging it. The green or blue arrows indicate where it will drop.

Step 4. You can edit the type of a plan-item. Select a row (flag or click it) and click **Change Type**. Chose from the options and change the plan-item into a product, work package, stage or activity.

Step 5. You can enter and maintain a time planning by:
- adding dates in the columns **Start planned** and **Final planned**, or by using the calendar
- using click-and-drag in the Gantt chart.

Step 6. You can add dependencies by clicking a bar and dragging to another bar (see also Working with dependencies on plan-items 121).
Note: Dependencies to other projects can be entered on the plan-item details page, **tab Dependencies**.

Step 7. Click **Save**.

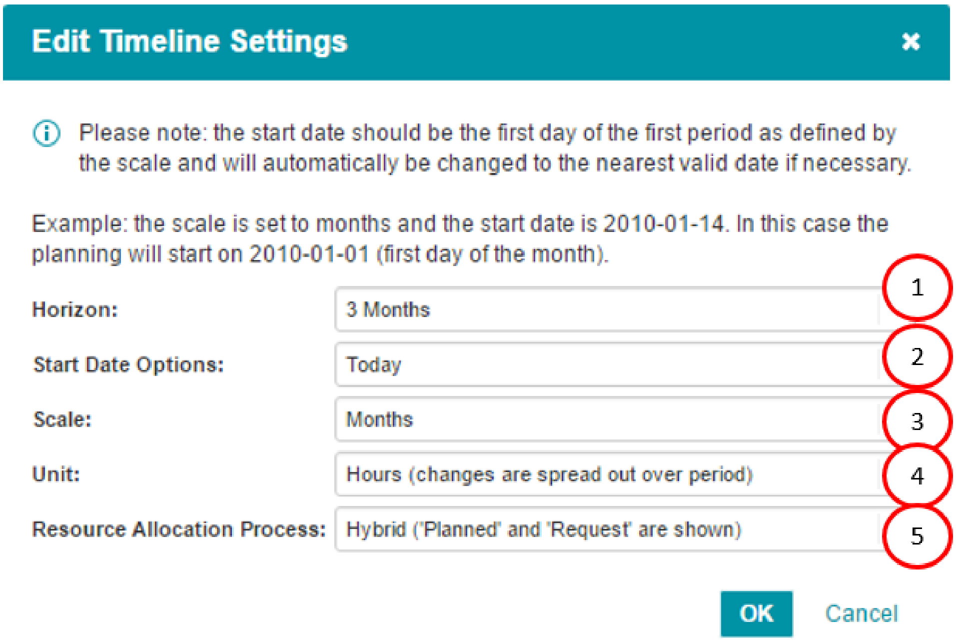
Some extra hints and tips when working with the Gantt:
- Click to enlarge the Gantt to full screen.
- Use the column **Percentage Completed** to enter the progress; the percentage completed is displayed by black bars.
- Click on View, then **Columns** to select which columns to show, so you can see and/or edit them directly.
- Add Owners to a plan-item: plan-item owners can edit plan-item details on their **Homepage** and the plan-item details page (e.g the percentage complete).

6.2.7 Manage the Resources on your project

As a Project Manager you can plan hours, request resources for your project and set a deviate hour rate for your project. To see how to set hour rates for your projects check Set Project specific hour rates 107

6.2.7.1 Configure the Resource Grid

It is possible to edit different settings for the ***Resource Grid.*** *To do this click the button* ***Edit Timeline Settings***

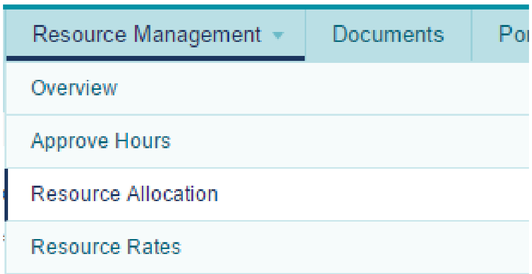


Dialogue box Timeline Settings

1. You can set the **Horizon** for different periods (3,6,12 or 24 months)
2. You can set the **Start Date** of the Resource Grid (today or selected date)
3. You can set the **Scale** (weeks, months or quarters)
4. You can set the **Unit** (hours, days per week or working days per week)
5. You can set the **Resource Allocation Process**
   a. **Project Request Driven -** This configuration is normally used when the project manager is requesting hours without information from the planned hours in the Gantt. So the project manager is requesting hours direct in the Resource Grid. Only the column **Request** is showing.
   b. **Project Demand Driven -** This configuration is normally used when the planned hours in the Gantt are used for requesting resources. Only the column **Planned** is showing.
   c. **Both -** This configuration is normally used when the Project Manager is using the Planned hours for deciding how many hours should be requested. Both the columns **Requested** and **Planned** are showing.

6.2.7.2 Working with the Resource Grid

As a Project manager you can request hours for your project. This can be done in the **Resource Grid**

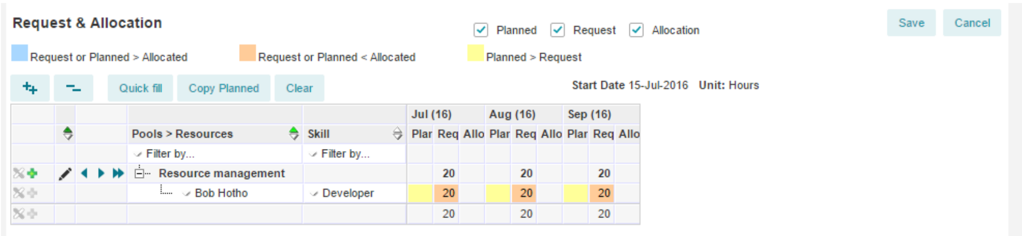


Tab Resource Management

Step 1. Navigate to the tab **Resource Management**
Step 2. Navigate to the sub-tab **Resource Allocation**

Step 3. Click the  button

Step 4. Click the  button to add a row
Step 5. Select the resource and/or the skill and fill in the request per week/month/ quarter
Step 6. Click the save button



Example Resource Allocation

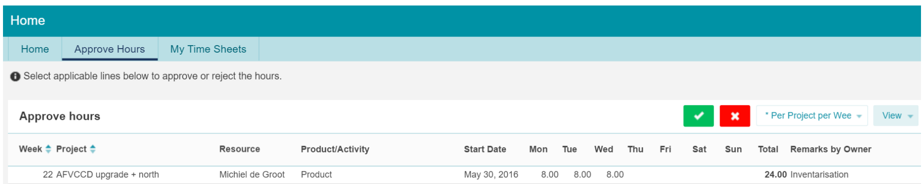
Note: To select resources you have to add resource pools see for more information Link a Resource Pool to your project 107

6.2.7.3 Approve and reject project hours

Principal Toolbox can be configured for actual hours entered on a project to be approved by the project manager. The **Home Page** of the project manager, on the **tab Approve Hours** shows a list of all hours entered on the project that have to be approved.

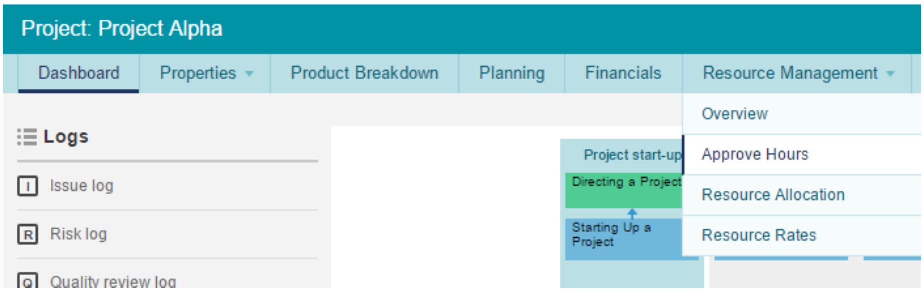
<u>Approve project hours</u>

Step 1. Navigate to your **Home Page**, **tab Approve Hours**. This tab shows a list of all hours that are entered on your project(s) and have to be approved.
Step 2. Select on or more rows and click  to approve, or  to reject hours. Optionally add a remark.



The Home Page, tab Approve Hours

Note: Hours to be approved can also be found in the projects themselves, on the **tab Resource Management**, **sub-tab Approve Hours**:



Project tab Resource Management, sub-tab Approve Hours

6.2.8 Manage Costs on your Project

There are 3 possible ways to enter costs on Projects in the Principal Toolbox

1. In the Financial Grid that is available on the **tab Report** and/or the tab **Financials** (depending on your configuration) (see: Managing Costs with the Financial Grid 125)
2. In the Gantt that is available on the **tab Planning, subtab Costs** project (see: Plan Costs with the Gantt chart 116)
3. In the **Order Log** (see: Managing Costs with the Order log 127)

Note: Where you can enter which costs depends on your configuration.

6.2.8.1 Managing Costs with the Financial Grid

Note: Where you can enter which costs depends on your configuration.

The financial administration of projects and programs forms the basis for the steering of projects, programs and portfolios on money. In the Principal Toolbox the ‘financial grid’ forms the foundation for monitoring of reservations, budgets, actuals and forecasts of projects.

The report cycle between projects, programs and portfolios is used to exchange financial information. This process is configurable in multiple ways. A common scenario is:

- Releasing budgets from the portfolio to projects or programs.
- Import the actual project costs from a financial system (possibly partially from the module time entry).
- Report of forecasts per project or program to the portfolio

Every portfolio and project has a tab Financials. This gives an overview of the financials of the projects or programs in the portfolio: the financial grid. The grid displays budgets, actuals, etc. per financial period (year, quarter or month). In a project the financial grid is available on the tab Financials.

The financial grid is divided in three periods:

- Everything prior to the current financial period
- The current financial period
- Everything following the current financial period

These types of information are standard in the Principal Toolbox:

- **Actuals**: Actual is used for realised costs. Data can be entered into this column in multiple ways:
  - Manually.
  - Imported from a financial system.
  - Based on the module Time Entry (in the Principal Toolbox you can link a rate to

resources which enables you to translate actual hours into actual costs).

- **Forecast**: Forecast is used for the expected costs of ongoing projects or programs. The Forecast is often entered by the project manager (in the portfolio report) and displayed in the portfolio.
  The project or program manager gives a forecast for the current and the following financial periods. There are three settings possible for entering the forecast for the current period:
  - Forecast for the remaining costs of this year,
  - Forecast for remaining costs per month,
  - Forecast for the total costs during the current year.

Note: Remaining costs are the expected costs from the Forecast start date to the end of the current financial period. The forecast start date is determined automatically when a report request is send from the portfolio and can be edited manually.
Note: Ideas do not have a project manager. The portfolio manager can enter forecasts on the portfolio side, enabling him to compare the total forecast with the total reserved.

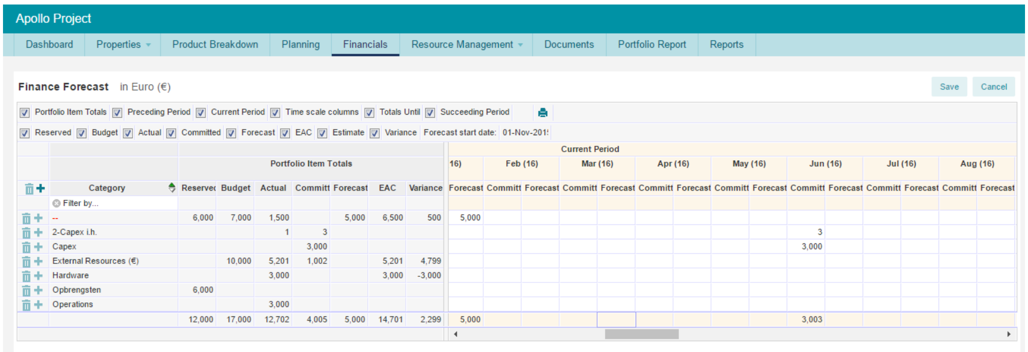
- **Committed**: A committed cost is an investment that a business entity has already made and cannot recover by any means, as well as obligations already made that the business cannot get out of. The column Committed is used to capture the commitments made for ongoing projects and programs. Commitments are mostly imported from the financial system but can also be entered manually.
- **Reserved**: The column Reserved is used for budget that has not been released yet. This column is often entered by the portfolio manager. From the reservation, the budget can be gradually released to the project or program manager. The column Reserved can also be used to enter reservations for the initiatives of the following year. During the year you can compare actuals and forecasts to the reservations.
- **Budget**: The column Budget is used for the approved project or program budget. The budget is often entered in the portfolio and is visible for the project or program manager. You can also use the column Budget to ’release’ the budget per stage.
- **Estimate**: The column Estimate displays the result of the following calculation; Estimate = Actual + Forecast for the current financial period.
- **EAC**: The column EAC shows the result of the following calculation: EAC = {sum of all costs before the forecast start date} + {sum of all forecasts after the forecast start date}.

Note: The EAC calculation neglects costs with a booking date at or after the forecast date.
Note: The Forecast start date can differ per project and is dependent on the last published report request. The content of the columns Variance and EAC is based on the Forecast start date of the project or programme itself.

You can adjust the availability and behaviour of the columns in the financial grid. You can also set the timescales of the previous, current and upcoming financial periods and adjust which financial categories can be used.

- The column **Variance** shows the remaining budget based on the following calculation: Variance = Budget – EAC.

![FORTES]



Example Financial Grid

In the financial grid you can display the project or program financials using financial categories (for example CAPEX, OPEX, hardware, software, etc.)

Click Edit (top right) and click the '+'-sign in front of the project or programme name to add financial categories to a project. With the sign they can be deleted.

6.2.8.2 Managing Costs with the Order log

Note: Where you can enter which costs depends on your configuration.

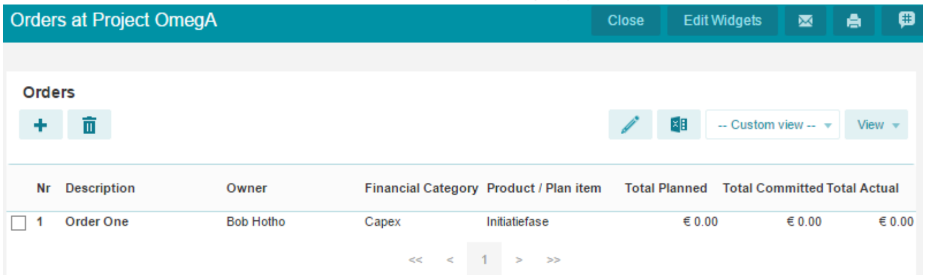
You can use the Order Administration (or Order Log) to enter orders on your project. You can use order to plan costs and enter commitments and actuals. Orders have a financial category and can be linked to plan items.

<u>Create and Manage Orders</u>

Step 1. Navigate to your project, to the **tab Dashboard**, to the **section Logs** and click **Orders**, the **Order Log** appears.

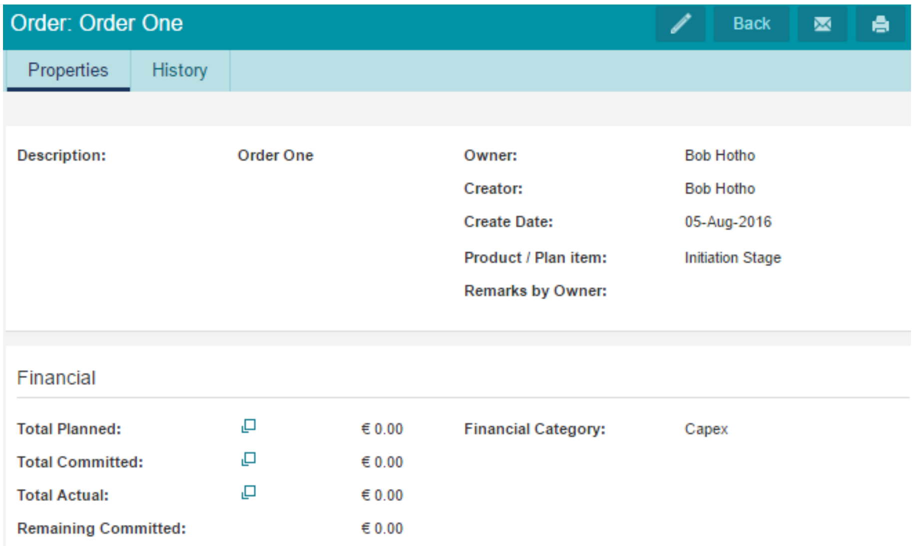
Step 2. Click to create a new order, a row appears in the Order Log.

Step 3. Enter a description, an owner, a financial category and a plan-item, click **Save**.



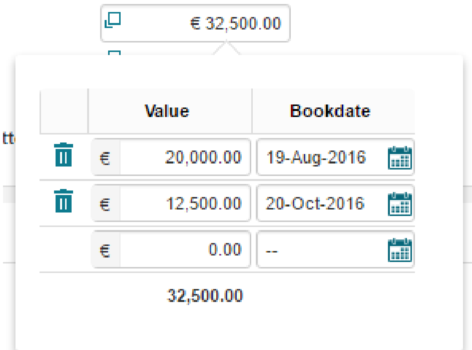
The Order Log

Step 4. To enter further details, click on the Description, a dialogue box appears:



The Order dialogue

Step 5. Click ✎ to edit the order: enter costs or edit other information. Costs are entered in a pop-up so you can enter amounts on different book dates:



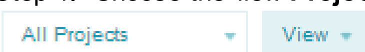
Entering Costs on an Order

Note: Make sure you enter a book date, otherwise the costs will not show in the **Financial Grid**.

6.2.9 Publish project information to the Portfolio

On the **Homepage,** the section **My Projects** shows an overview of the projects in which you have a role. The overview shows if there is a pending report request of a portfolio.

Step 1. Choose the view **Project overview** from the drop down list.



The column **Report status** shows:

 = a report request is past the due date, but hasn't been published yet.

 = the report request has been published to the portfolio by the project manager.

 = a report request has yet to be published by the project manager (but is not yet overdue).

Step 2. In the section **My Projects**, click on the project name to go to the project.
Step 3. **For a Single Sheet:** the report appears directly on the screen. Click **Edit**.
Step 4. **For a Project:** go to the tab **Portfolio Report**. Click **Edit**. Note: The tab

Portfolio Report will only be filled if there is a report request from the Portfolio.

Step 5. Enter the data and click **Save**. You can edit the data until you are done.

Step 6. Click **Publish to the Portfolio** in the top right of your screen to report the data to the portfolio. Note: The button **Publish to the Portfolio** will only be shown if there is a report request from the Portfolio.

6.2.10 Pack Project Offline

You can export a project as an HTML file. This file can be viewed with any web browser (thus without the Principal Toolbox).

Step 1. Navigate to your project, tab Dashboard and click **Pack Project Offline**, a zip file is created.

Step 2. Save the zip file to your disk.

Step 3. Open the zip file and click **index.html** to view the project information.

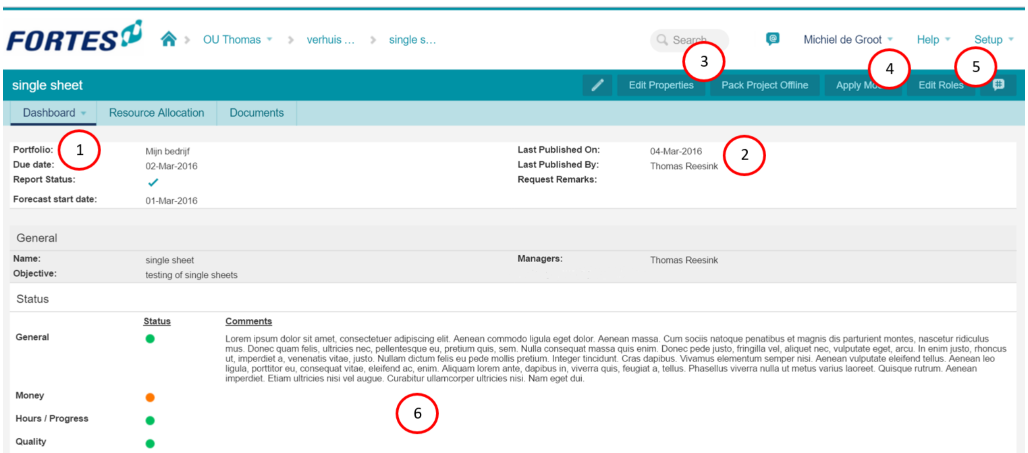
Note: These HTML files are not suitable for importing in the Principal Toolbox.

6.3 Working in a Single Sheet Project

Within single sheet projects several basic functions are available: Search 22, Messaging 68, Reporting 47, Working with widgets 31, Working with roles 56, Viewing the change history 68, Document management 62.

Single sheet projects are projects that consist of basically one page. A Single Sheet project for example has no logs and has no planning Gantt. Single sheet can for example be used to register a project and report on its status, without actually planning and controlling the project with the Principal Toolbox. The main features of a single sheet project are:

- Show, edit and report project (status) information from one page: project fields and project finances.
- Request resources for your project.
- Enter time on your project (time entry).
- Report to the portfolio.



The Single Sheet dashboard

<u>What you see on a Single Sheet project</u>

1. The top section of the dashboard shows general information.
2. The top section also shows information about the last publication date to the portfolio.

3. Click **Edit Properties** to configure your Single Sheet project, a pop-up appears. In this pop-up you can change the name and objective of the project. Whether you can actually do this is dependent on your configuration.
4. If you decide that you want to plan and control your project as a 'regular' project (with logs and planning Gantt), click **Apply Model**, a dialogue box appears. Select the model you wish to apply and click **OK**.
   Note: this button is not available when a report request is pending from the portfolio - the button **Publish to portfolio** will then be shown. A model can only be applied after this has been done!
5. Click **Edit Roles** to add team members to your project.
6. This section is defined by sending a report request from the portfolio to the single sheet project.

Note: in the screenshot above the tabs Resource Allocation and Documents are visible, these only show if allowed by system settings. Please contact you system administrator for more information.

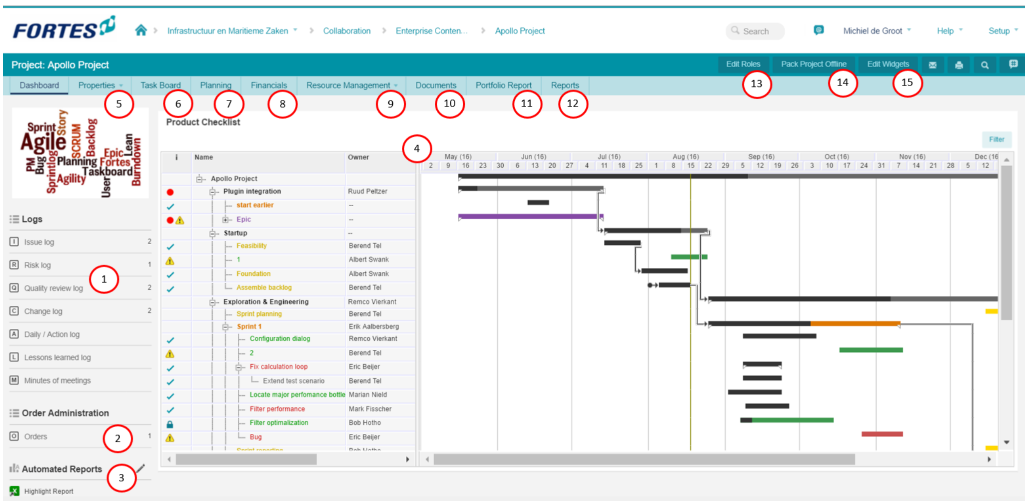
6.4 Working in an Agile Project

Within an agile project several basic functions are available: Search 22, Messaging 68, Reporting 47, Working with widgets 31, Working with views 23, Working with roles 56, Viewing the change history 68, Document management 62.

The main features of working in a agile project are:

- Plan, manage and report on your agile project on all relevant aspects based on Agile principles
- Apply project specific configuration, i.e. set project specific role permissions.
- Publish project information to the portfolio.

Note: the way your agile project process is supported strongly depends on the configuration. Please contact your system administrator for more information.



The agile project dashboard

<u>What you see on the Project Dashboard</u>

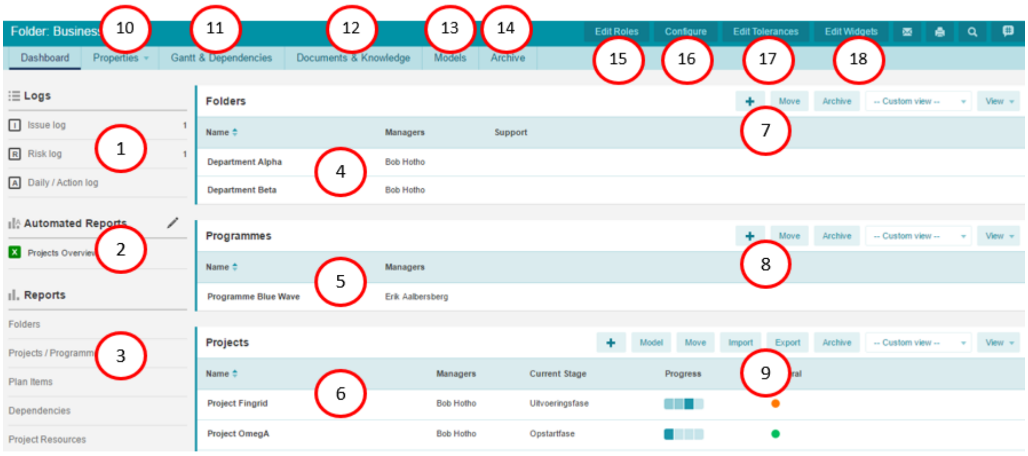
1. The **section Logs**, where you can create and manage log-items (available logs depend on your configuration). See Working with Logs 52.
2. The **Order log**, where you can create and manage orders (option available depending on your configuration). See Working with the Order log 127.

3. The **section Automated Reports**, where you can run or create Automated Reports (option available depending on your role). See Working with Automated Reports 47.
4. The **Product Checklist** gives a quick view of the project planning. The project manager can limit what is shown here by applying an filter (click on **Filter**).
5. On the **tab Properties** you can view and edit project information. See Edit the Properties of a Project 108.
6. On the **tab Taskboard** you can manage the progress of deliverables with the task board and the burn down widget. See Working with the Task Board and working with the burn down widget.
7. On the **tab Planning** you can view and edit the project planning in time, costs and resources. See Planning and Agile project. Also, you can view and manage the backlog of the project, see working with the backlog.
8. On the **tab Financials** you can view and edit the financial grid, showing all project financials plotted over time (depending on your configuration). See Managing Costs with the Financial Grid 125.
9. On the **tab Resource Management** you can request hours, approve hours and set project specific hour rates. See Manage the Resources on your project 123
10. On the **tab Documents** you can view and add documents. See Document Management 62.
11. On the **tab Portfolio Report** you can publish information to the portfolio. See Publish to the Portfolio 128.
12. On the **tab Reports** you can report on any information of the project. See Reporting 47.
13. Click **Edit Roles** to view or edit the roles on your project. See Working with Roles 56
.
14. Click **Pack Project Offline** to export your project as an HTML-file. See Pack Project Offline 129.
15. Click **Edit Widgets** to add widgets in the top section of this dashboard. See Working with widgets 31.

6.5 Working in a Folder

Folders exist in the Project Management module. Folder can be used to group projects and programmes. The main features of folders are:

- Report on all projects and programmes in the folder
- Create sub folders
- Start projects or programmes without a portfolio reference (depends on the configuration and your role)



The Folder Dashboard

<u>What you see on the Folder Dashboard</u>

1. The **section Logs**, where you can create and manage log-items. See Working with Logs 52.
2. The **section Automated Reports**, where you can run or create Automated Reports (option available depending on your role). See Working with Automated Reports 47.
3. The **section Reports**, where you can report on any information in projects (option available depending on your role). See Reporting 47.
4. The **section Folders**, where you can view, create or navigate to sub folders.
5. The **section Programmes**, where you can view, create (depending on your configuration) or navigate to programmes.
6. The **section Projects**, where you can view, create (depending on your configuration) or navigate to projects.
7. Click these buttons to create, move or archive a sub folder (options depend on your role).
8. Click these buttons to create, move or archive a programme (options depend on your role).
9. Click these buttons to create, move, archive, import or export a project, or to create a Project Model from an existing project (options depend on your role).
10. On the **tab Properties** you can view and edit folder information.
11. On the **tab Gantt & Dependencies** you can view and edit the folder Gantt. See Working with the Folder Gantt 139
12. On the **tab Documents & Knowledge** you can view and add documents. See Document Management 62.
13. On the **tab Models** you can view the models that are stored in this folder.
14. On the **tab Archive** you can view the archive and restore or delete archived items. See Working with the Archive 67.
15. Click **Edit Roles** to view or edit the roles on this folder. See Working with Roles 56.
16. Click **Configure** to view or edit the folder properties. See Edit the properties of a Folder 135.
17. Click **Edit Tolerances** to view or edit the tolerances set for the projects in this folder. See Working with Tolerances 137.
18. Click **Edit Widgets** to add widgets in the top section of this dashboard. See Working with widgets 31.

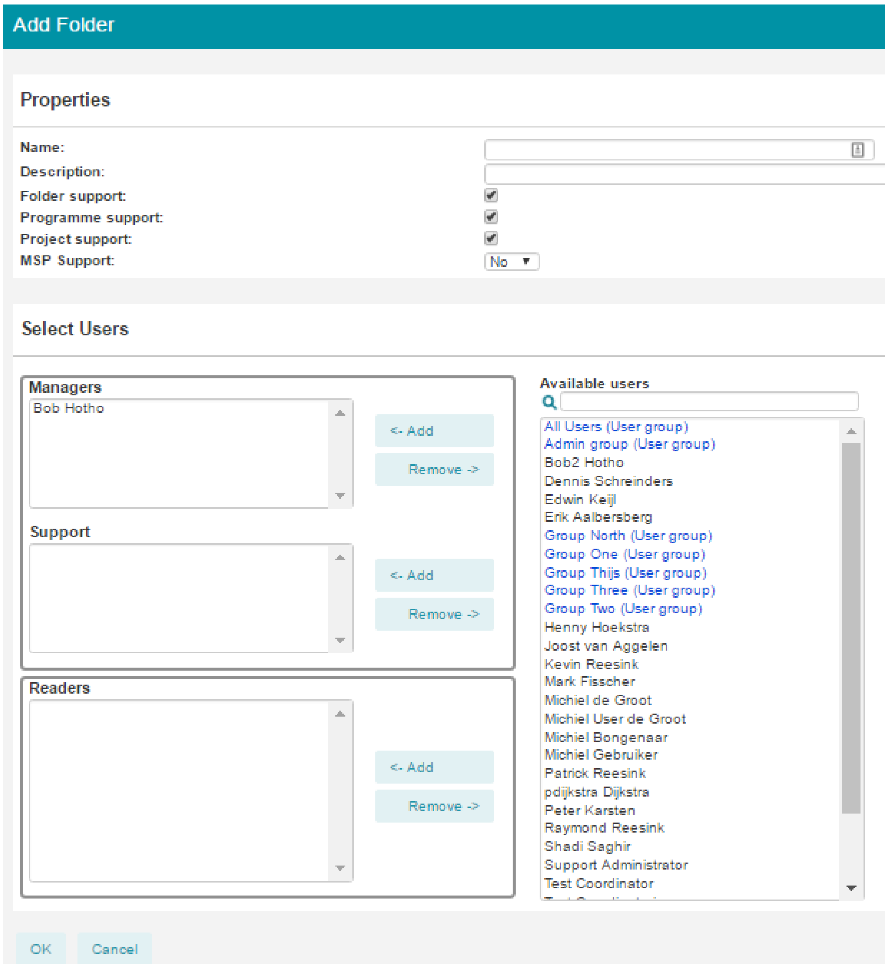
The next topics cover all relevant use cases when working with folders.

6.5.1 Create a Folder

Create a folder

Step 1. Navigate to the **Project Management Dashboard** or to an existing folder.

Step 2. In the **section Folders**, click +, a dialogue box appears:



Dialogue box Add a folder

Step 3. Fill in the dialogue box:

- Enter the folder name and description.
- Use the check boxes to determine the folder properties:
  - Folder support: check to show the section folders (and allow subfolders)
  - Programme support: check to show the section Programmes
  - Project support: check to show the section Projects
  - MSP support: check to show the section MSP

    Note: the 'MSP Support' function is an old function in the PTB. If you do not work with this module you can leave it as 'no'.
- Add users to the folder roles (see Working with Roles 56)

Step 4. Click **OK**, the folder is now created.

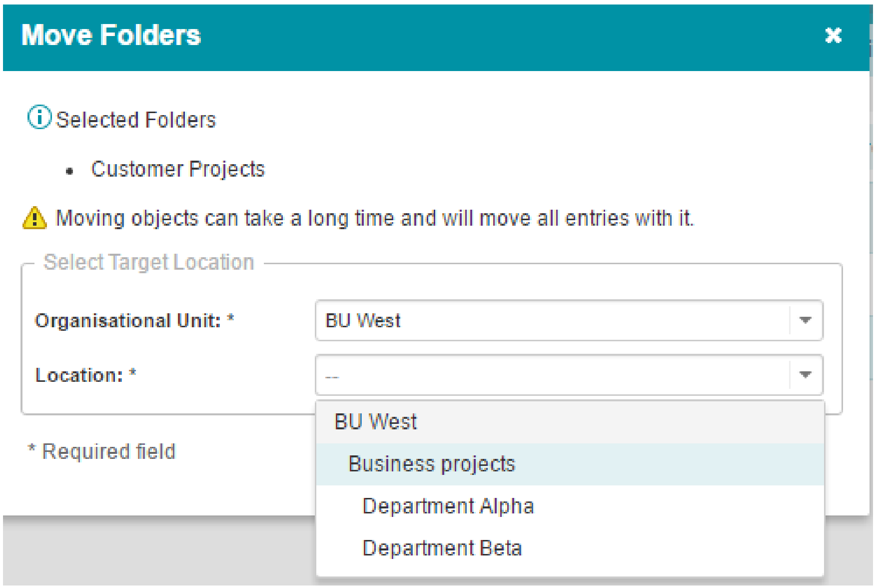
6.5.2 Move a Folder

It is possible to move a folder with all its content to another location (depending on your role).

Move a folder

Step 1. Navigate to **Project Management** to the **section Folders** and select the row of the folder you want to move.

Step 2. Click **Move**, a dialogue box appears:



Dialogue box Move Folders

Step 3. Select the appropriate Organisational Unit and the appropriate Folder and click **OK**. The folder and all its content is now moved.

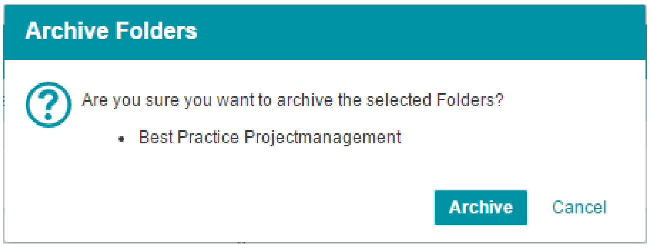
6.5.3 Archive a Folder

You can move a folder and all its contents to the archive.

<u>Archive a folder</u>

Step 1. Navigate to **Project Management** to the **section Folders** and select the row of the folder you want to archive.

Step 2. Click **Archive**, a pop-up appears:



Pop-up Archive Folders

Step 3. Click **Archive**, the folder and all its content is moved to the **tab Archive**.

6.5.4 Working with Logs in a Folder

Every folder has three logs: an **Issue Log**, a **Risk Log** and a **Daily/Action Log**. These logs can be used to manage issues, risks and actions on folder level. Projects and programmes can escalate issues and risks to folder level.

For more information see [Working with Logs](52).

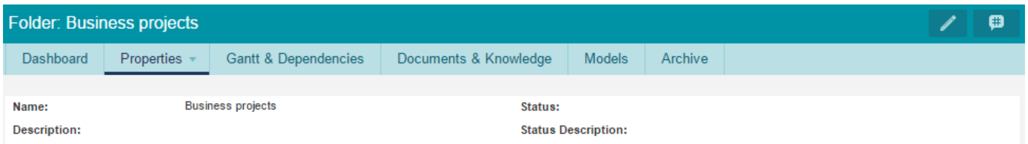
6.5.5 Edit the properties of a Folder

You can edit the properties of a folder, e.g. change the name, or change the configuration.

Edit the properties of a folder

Step 1. Navigate to the folder, to the **tab Properties**, click .

Step 2. Edit the information and click **Save**.

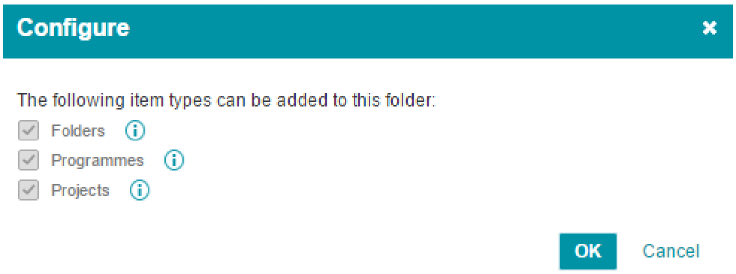


Folder tab Properties

Configure a folder

Step 1. Navigate to the folder, **tab Dashboard**, click **Configure**, a pop-up appears.

Step 2. Edit the configuration setting and click **OK**.



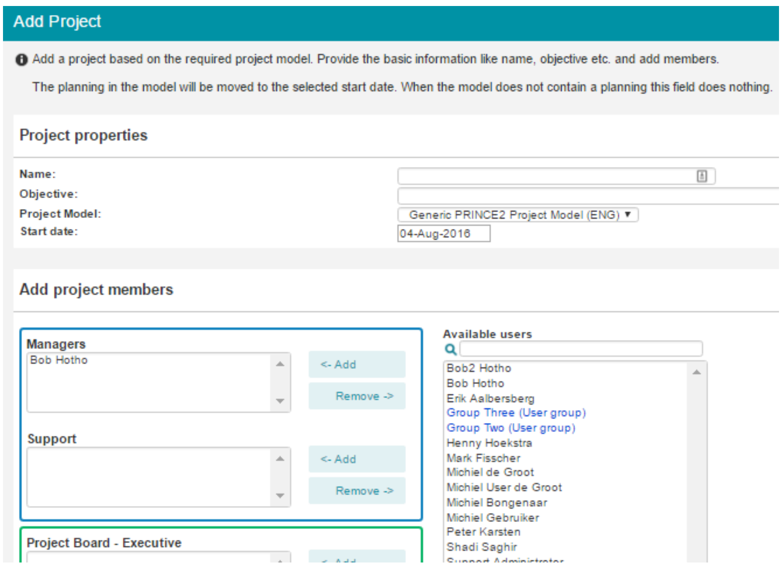
Pop up configure a folder

6.5.6 Start, Move, or Archive a Project

It is possible to move a project to another folder or to the archive. Depending on your configuration it is also possible to start a project in a folder; projects started in a folder will have no reference to a portfolio.

Start a project from a folder

Step 1. Navigate to the folder, to the **section Projects**, click , a dialogue box appears:



Dialogue start project from a folder

Step 2. Enter the details:

- Name: the name of the project
- Objective: the objective of the project
- Project Model: select the Project Model to be used for the project.
- Start Date: moves the planning in the Project Model (if available) to this date.
- Add project members: add users to the project roles.

Note: See Creating or moving models 81 to see the details of which models are available at selection and how to change this if necessary.

Step 3. Click **OK**, the project is created and appears in the folder.

Move a project from folder to folder

See Moving Items 56.

Archive a project

See Working with the Archive 67.

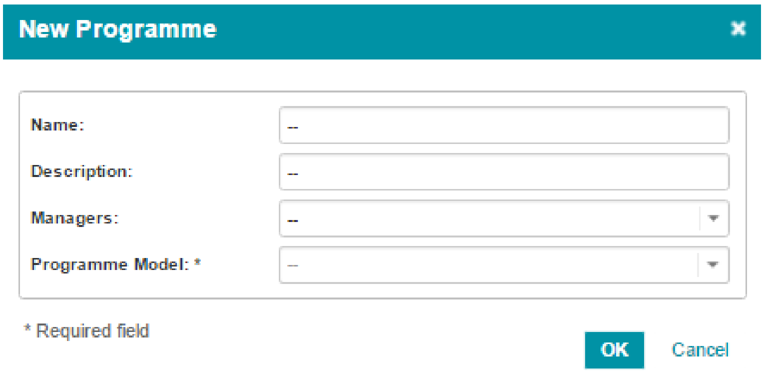
Note: Projects have to be archived in a folder separately from archiving in the portfolio. This is because archiving in a folder or portfolio is usually done form a different perspective.

6.5.7 Start, Move or Archive a Programme

It is possible to move a programme to another folder or to the archive. Depending on your configuration it is also possible to start a programme in a folder; programmes started in a folder will have no reference to a portfolio.

Start a programme from a folder

Step 1. Navigate to the folder, to the **section Programmes**, click +, a dialogue box appears:



Dialogue start programme from a folder

Step 2. Enter the details:

- Name: the name of the programme
- Description: a description of the programme
- Managers: the programme manager
- Programme Model: select the Programme Model to be used for the programme.

Step 3. Click **OK**, the programme is created and appears in the folder.

Move a programme from folder to folder

See [Moving Items] 56.

Archive a programme

See [Working with the Archive] 67.

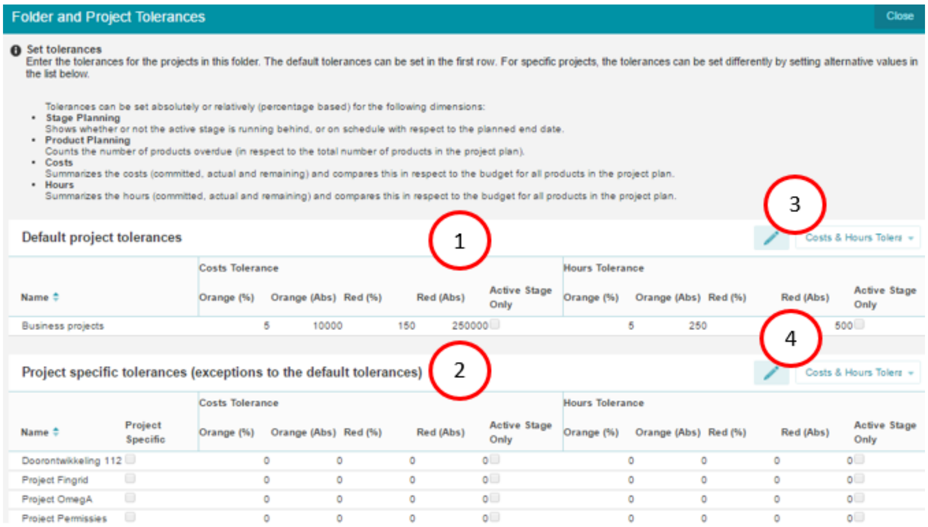
Note: Programmes have to be archived in a folder separately from archiving in the portfolio. This is because archiving in a folder or portfolio is usually done form a different perspective.

6.5.8 Working with tolerances

In a folder you can define tolerances for time, costs and hours. These tolerances will automatically set the project status fields Planning Status, Costs Status and Hours Status. You can define default tolerances for all projects in the folder, and you can define project specific tolerances if you want to deviate from the default.

Set default tolerances for projects in a folder

Step 1. Navigate to a folder, **tab Dashboard** and click **Edit Tolerances**, a dialogue box appears:



Dialogue box Edit Tolerances

What you see in the dialogue Edit Tolerances

1. The **section Default project tolerances**, where you can set the default tolerances.
2. The **section Project specific tolerances**, where you can set the project specific tolerances.
3. Choose/Edit Cost & Hour Tolerances or Planning Tolerances (default).
4. Choose/Edit Cost & Hour Tolerances or Planning Tolerances (project specific).

Step 2. In the **section Default project tolerances**, select a tolerance view and click .

Step 3. Enter the tolerances and click **Save**.

Set project specific tolerances, deviating form the folder defaults

Step 1. Navigate to a folder, **tab Dashboard** and click **Edit Tolerances**, a dialogue box appears (see above)

Step 2. In the **section Project specific tolerances**, select a tolerance view and click

.

Step 3. Enter the project specific tolerances and click **Save**.

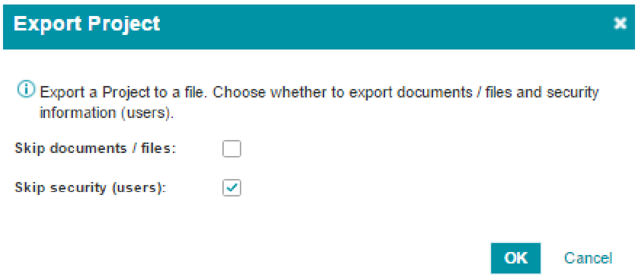
6.5.9 Import or Export a Project

You can export and import a project (depending on your role). This function can be used to transfer a project to another installation of Principal Toolbox.

<u>Export a Project</u>

Step 1. Navigate to a folder, to the **section Projects** and select the row of the project to export.

Step 2. Click on **Export**, a pop up appears:



Dialogue export a project

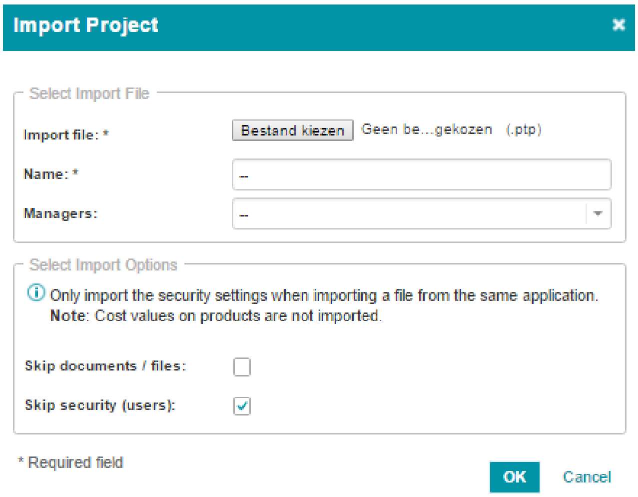
Step 3. Use the check boxes to include documents and users in the export or not, and click **OK**.

Step 4. Save the export file to your disk.

<u>Import a Project</u>

Step 1. Navigate to a folder, to the **section Projects** and select the row of the project to import.

Step 2. Click on **Import**, a pop up appears:



Dialogue import a project

Step 3. Enter the details:

- Choose file: select the project file to import. Please note that this has to be a .ptp file. This means that only Principal Toolbox projects that have been exported from other locations/toolboxes can be selected.
- Name: enter a name for the project.
- Managers: select the project manager.
- Use the check boxes to include documents and users in the import or not.

Step 4. Click **OK**, the project appears in the folder.

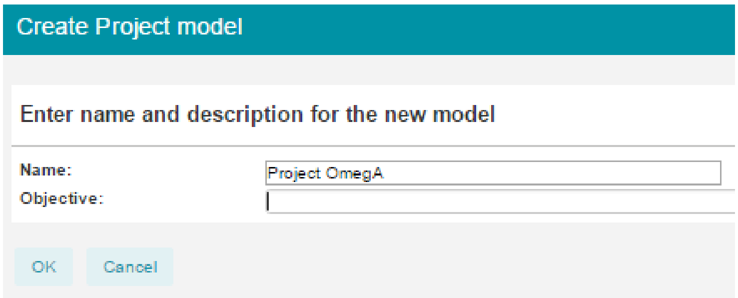
6.5.10 Create a Project Model from a Project

You can use an existing project as the basis for a Project Model. Project Models can also be created in other ways, but sometimes it is useful to use an existing project as the basis. For more information on Project Models see [Working with Models] 80.

Create a Project Model from a project

Step 1. Navigate to a folder, to the **section Projects** and select the row of the appropriate project.

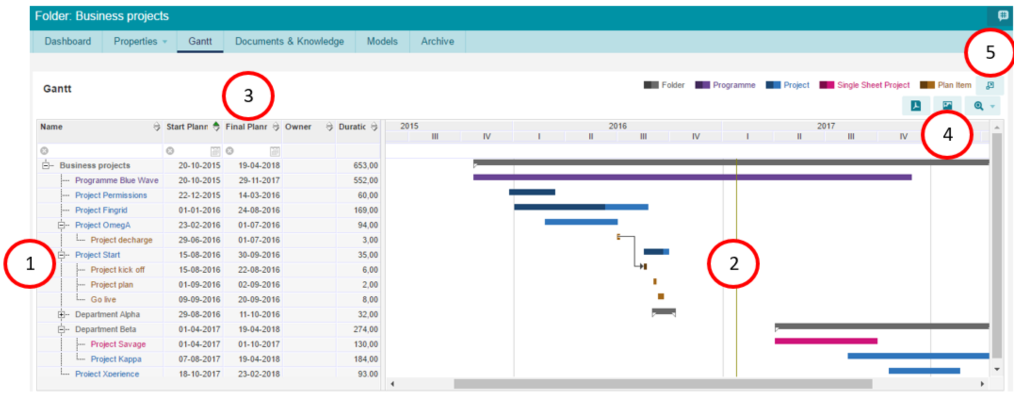
Step 2. Click on **Model**, a pop up appears:



Step 3. Enter the objective and click **OK**, the project model appears on the **tab Models**.

6.5.11 Working with the Folder Gantt

The Folder Gantt displays the planning of the projects in the folder; it can also show plan-items. The legend indicates which items have which colour. This topic describes the functions of the Folder Gantt.



The Folder Gantt

The main functions of the Folder Gantt are:

1. Click on ➕ to fold or unfold subfolders and/or projects. Plan-items are shown in the folder Gantt either when their priority is set to 'high', or when hey have a dependency to another project.
2. The Gantt bar only shows dependencies between plan-items of different projects. Note: dependencies between plan-items can be set in the project Gantt and are set independently from dependencies between portfolio-items.
3. The columns that are shown are fixed and cannot be changed. There are several options to work with columns:
   - use drag and drop the change column widths and to change the order of columns.
   - click and drag the divider left of the Gantt bars to slide the Gantt bars 'over' the columns.

- drag a column to the right of the divider to always keep it in view.
- use the filter field at the top of the columns to filter rows.

4. Click to print the Gantt as a PDF.
   Click to create an image of the Gantt.
   Click to zoom in/zoom out; alternatively left-click/right-click the date header above the Gantt bars.
5. Click to enlarge the Gantt to full screen.

Working with Programme Management

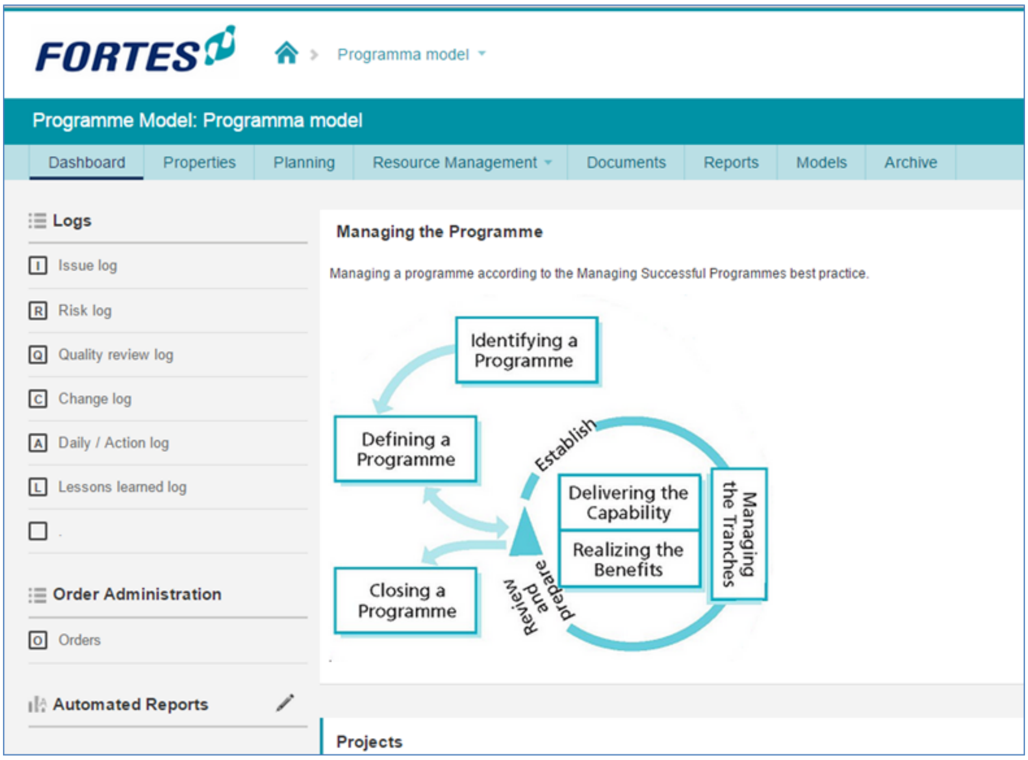
7 Working with Programme Management

Within the Programme Management module several basic functions are available: Navigation 21, Search 22, Reporting 47, Working with views 23, Working with widgets 31, Document management 62, Messaging 68, Working with roles 56, Working with the archive 67, Creating items 53, Viewing the change history 68.

The Programme Management module allows you to manage programmes: doing the programme right! The module supports programme teams 'from programme start to programme finish'.

The main features of the Programme Management module are:

- Plan, manage and report on the programme in time, resources, money, risks, quality, issues, scope and more
- Define the programme plan, including the projects and project deliverables
- Start and monitor projects within your programme
- Publish programme information to the portfolio



Working with Resource Management

8 Working with Resource Management

In the Resource Management module several basic functions are available: Navigation 21, Search 22, Reporting 47, Working with views 23, Working with widgets 31, Messaging 68.

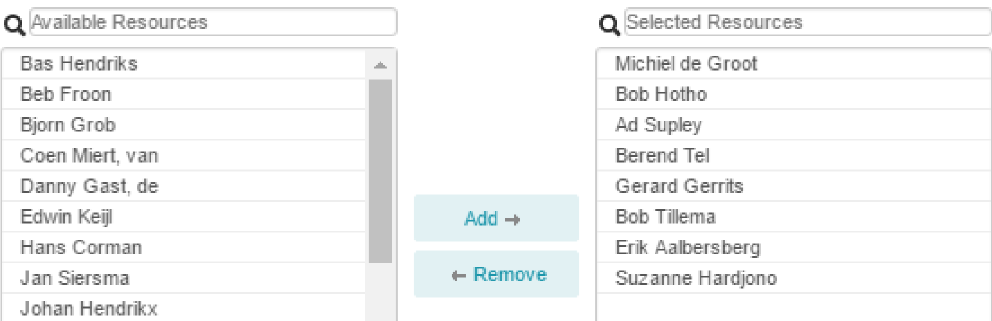
Resource Management supports the resource management process: planning, requesting and allocating resources to project, programmes and to non-project-activities.

The main features of the Resource Management module are:
- Register the availability of resources.
- Short term and long term analysis of planned skills and/or resources versus availability.
- Find solutions when resources are over requested.
- Allocate resources to projects and programmes.
- Allocate resources to non-project-activities.

The next topics cover all relevant use cases when working with Resource Management.

8.1 Manage the members of your Resource Pool

Configure Resource Management
Navigate to tab **Resource Management**, click **Edit Resources**, a pop-up appears. Add users, click **OK.**



Note: Skills are defined and assigned by your administrator.

8.2 Working with the Resource-Utilisation widget

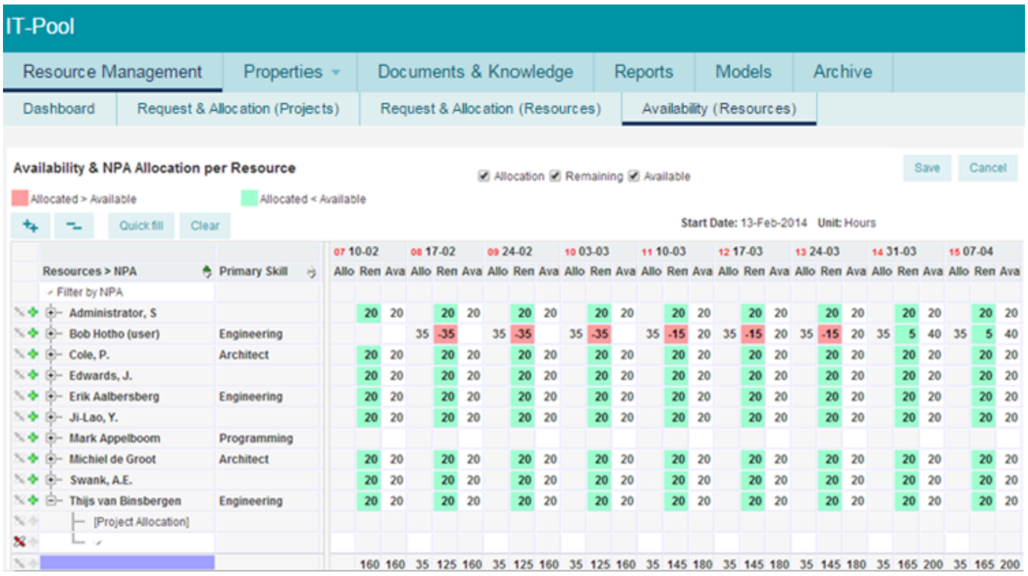
Working with the RU-widget is described under Working with widgets, Resource Utilisation widget.

8.3 Working with the Allocation Grid

The next topics describe how to work with the resource allocation grid. You can use the grid to manage the availability of your resources and to allocate them to projects or non-project-activities (such as leave).

8.3.1 Manage the availability of your resources

You can enter and manage the availability of your resources in the **tab Resource Management**, **subtab Availability (Resources)**.



Subtab Availability (Resources)

<u>Enter and manage the availability of resources</u>

Step 1. Navigate to the **tab Resource Management**, **subtab Availability**, and click to edit the availability.

Step 2. Enter the available hours per period per resource in the columns **Availability** (Ava):

- you can use the select boxes above the grid to only show the columns Available
- you can enter hours in individual cells
- you can use click-and-drag to select a range of fields; use shift-click-and-drag to select multiple ranges; on selections you can:
  - Quick fill all fields in the selection with the same value: press **q**, or click the button **Quick fill**, or right-click the selection and select **Quick Fill**
  - Clear all entries in all fields in the selection: press **x**, or click the button **Clear**, or right-click the selection and select **Clear**.
    Note: Click **Help**, then **Shortcuts** for an overview of shortcuts.

Step 3. Click **Save** to save the changes.

<u>Enter and manage allocation on non-project activities</u> (e.g. holidays)

Step 1. Navigate to the **tab Resource Management**, **subtab Availability**, and click to enter the edit mode.

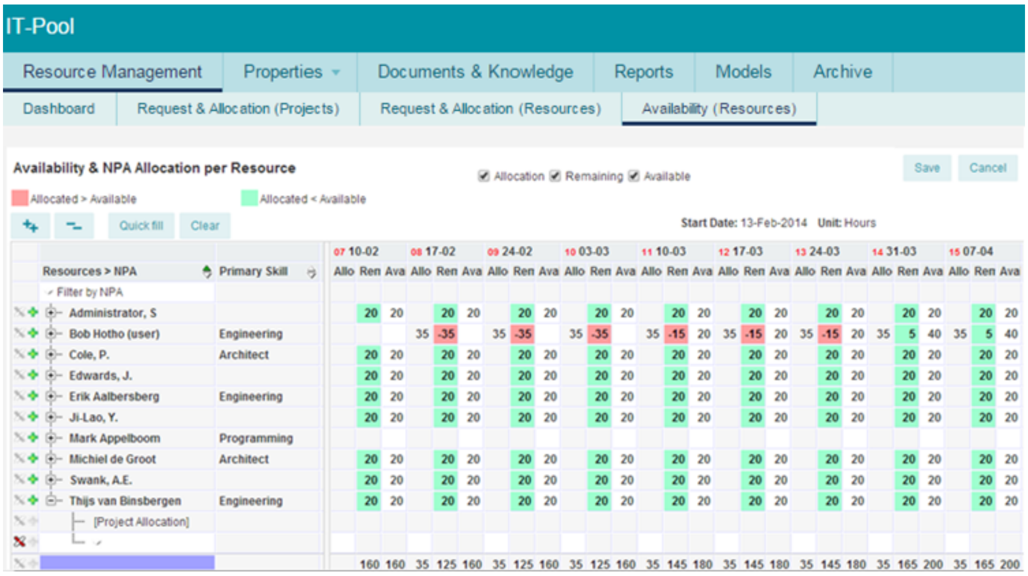
Step 2. Click on the icon in front of a resource, a new row appears.

Step 3. In the new row, in the first column, select the appropriate activity

Step 4. Enter hours as described above, and click **Save** to save the changes.

8.3.2 Allocate resources to non-project-activities

You can allocate your resources to non project activities (such a leave) in the **tab Resource Management**, **subtab Availability (Resources)**.



Subtab Availability (Resources)

Enter and manage allocation on non-project activities (e.g. holidays)

Step 1. Navigate to the **tab Resource Management**, **subtab Availability**, and click to enter the edit mode.

Step 2. Click on the icon in front of a resource, a new row appears.

Step 3. In the new row, in the first column, select the appropriate activity

Step 4. Enter hours per period per resource in the columns **Allocation** (Allo):

- you can use the select boxes above the grid to only show the columns Allocation
- you can enter hours in individual cells
- you can use click-and-drag to select a range of fields; use shift-click-and-drag to select multiple ranges; on selections you can:
  - Quick fill all fields in the selection with the same value: press **q**, or click the button **Quick fill**, or right-click the selection and select **Quick Fill**
  - Clear all entries in all fields in the selection: press **x**, or click the button **Clear**, or right-click the selection and select **Clear**.

    Note: Click **Help**, then **Shortcuts** for an overview of shortcuts.

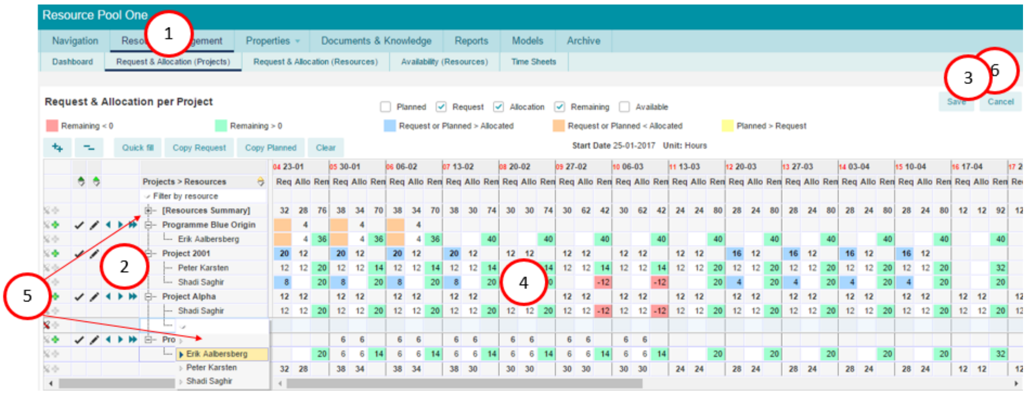
Step 5. Click **Save** to save the changes.

8.3.3 Allocate resources to Projects or Programs (Project View)

You can allocate resources on projects. Be aware that availability of your resources should be up to date. Also project managers should first request hours on skills and/or resources.

The **subtab Request & Allocation (Projects)** and the **subtab Request & Allocation (Resources)** show the same information, but structured differently:

- The **subtab Request & Allocation (Projects)** lists all requests per project
- The **subtab Request & Allocation (Resources)** lists all requests per resource



Subtab Request & Allocation (Projects)

<u>Allocate resources to projects</u>

Step 1. Navigate to the tab **Resource & Allocation (Projects)**. The grid shows an overview of planned/requested/allocated/remaining hours per project per resource per period.

Step 2. Click the icon in front of a project to unfold the resource details per project, or click in the top left corner to unfold all rows.

Step 3. Click to switch to edit mode, in order to enter and manage allocation of hours.

Step 4. In the edit mode you can <u>allocate hours per period per resource</u> in the columns **Allocation** (Allo):

- you can use the select boxes above the grid to hide or show columns in the grid
- you can <u>enter hours in individual cells</u>
- you can use click-and-drag to <u>select a range of fields</u>; use shift-click-and-drag to select multiple ranges; on selections you can:
  - Quick fill all fields in the selection <u>with the same value</u>: press **q**, or click the button **Quick fill**, or right-click the selection and select **Quick Fill**
  - Quick fill all fields in the selection <u>with the same value as the 'requested hours'</u>: press **r**, or click the button **Copy Request**, or right-click the selection and select **Copy Request**.
  - Quick fill all fields in the selection <u>with the same value as the 'planned hours'</u>: press **p**, or click the button **Copy Planned**, or right-click the selection and select **Copy Planned**.
    Note: this option is available depending on your configuration.
  - <u>Clear all entries</u> in all fields in the selection: press **x**, or click the button **Clear**, or right-click the selection and select **Clear**.
    Note: Click **Help**, then **Shortcuts** for an overview of shortcuts.
  - <u>Move all allocated hours</u> one or four weeks to the left or right: use the icons in front of the rows.
  - Check the legend above the grid to understand them meaning of the colour highlights.

Step 5. Some notes on working with (the colour indications in) the grid:

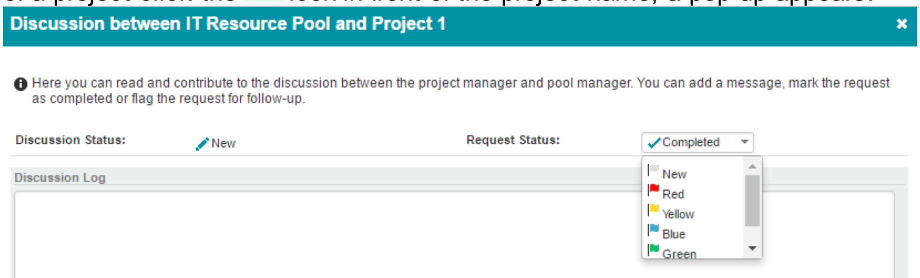
- Red coloured cells indicate <u>overallocation of a resource</u>. Unfold the top row **[Resources Summary]** to check the availability of other resources. To allocate another resource to solve the overallocation, click the icon in front of the project, a new row appears: select the appropriate resource and allocate hours.
- Blue coloured cells indicate <u>underallocation on a project</u>. This generally concerns requests that are not allocated yet.
- Orange coloured cells indicate <u>overallocation on a project</u>.
- Green coloured cells indicate <u>remaining availability of a resource</u>.
- Use the filter at the top of the project or skill column to quickly change from

an overall view to e.g. a resource specific view.

Step 6. After finishing the allocation, click **Save**.

<u>Use the message service to contact a project manager</u>

Step 1. The grid contains a message service to support a dialogue between project manager and resource manager. To start a dialogue with the project manager of a project click the icon in front of the project name, a pop-up appears.



Pop-up message service

Step 2. In the pop-up you can start a dialogue by entering a message. Optionally flag the discussion; this flag is shown in front of the project name. Click **OK** to send the message.

Legend of the icons used by the message service:

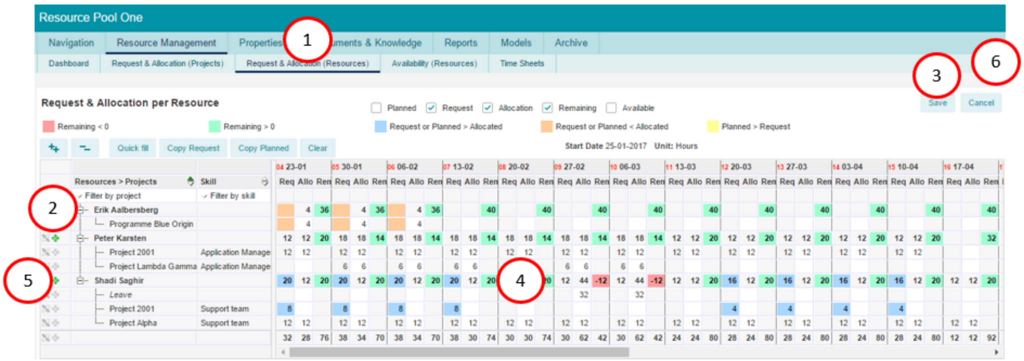
- new discussion
- urgency level (flags in the colours Red, Yellow, Blue and Green)
- finished
- start a discussion
- message sent to the project manager
- message received from the project manager

8.3.4 Allocate resources to Projects or Programs (Resource View)

You can allocate resources on projects. Be aware that availability of your resources should be up to date. Also project managers should first request hours on skills and/or resources.

The **subtab Request & Allocation (Projects)** and the **subtab Request & Allocation (Resources)** show the same information, but structured differently:

- The **subtab Request & Allocation (Projects)** lists all requests per project
- The **subtab Request & Allocation (Resources)** lists all requests per resource



Subtab Request & Allocation (Resources)

<u>Allocate resources to projects</u>

Step 1. Navigate to the tab **Resource & Allocation (Resources)**. The grid shows an overview of planned/requested/allocated/remaining hours per resource per project per period.

Step 2. Click the icon in front of a resource to unfold the project details per resource, or click in the top left corner to unfold all rows.

Step 3. Click to switch to edit mode, in order to enter and manage allocation of hours.

Step 4. In the edit mode you can <u>allocate hours per period per resource</u> in the columns **Allocation** (Allo):

- you can use the select boxes above the grid to hide or show columns in the grid
- you can <u>enter hours in individual cells</u>
- you can use click-and-drag to <u>select a range of fields</u>; use shift-click-and-drag to select multiple ranges; on selections you can:
  - Quick fill all fields in the selection <u>with the same value</u>: press **q**, or click the button **Quick fill**, or right-click the selection and select **Quick Fill**
  - Quick fill all fields in the selection <u>with the same value as the 'requested hours'</u>: press **r**, or click the button **Copy Request**, or right-click the selection and select **Copy Request**.
  - Quick fill all fields in the selection <u>with the same value as the 'planned hours'</u>: press **p**, or click the button **Copy Planned**, or right-click the selection and select **Copy Planned**.
    Note: this option is available depending on your configuration.
  - <u>Clear all entries</u> in all fields in the selection: press **x**, or click the button **Clear**, or right-click the selection and select **Clear**.
    Note: Click **Help**, then **Shortcuts** for an overview of shortcuts.
  - Check the legend above the grid to understand them meaning of the colour highlights.

Step 5. Some notes on working with (the colour indications in) the grid:

- Red coloured cells indicate <u>overallocation of a resource</u>. Look for green cells to find resources with remaining availability; if useful use the filter above the column **Skill** to find appropriate candidates. To allocate another resource to solve the overallocation, click the icon in front of the resource, a new row appears: select the appropriate project and allocate hours.
- Blue coloured cells indicate <u>underallocation on a resource</u>. This generally concerns requests for this resource that are not allocated yet.
- Orange coloured cells indicate <u>overallocation of a resource on a project</u>.
- Green coloured cells indicate <u>remaining availability of a resource</u>.
- Use the filter at the top of the project or skill column to quickly change from an overall view to e.g. a resource specific view.

Step 6. After finishing the allocation, click **Save**.

Working with Time Entry

9 Working with Time Entry

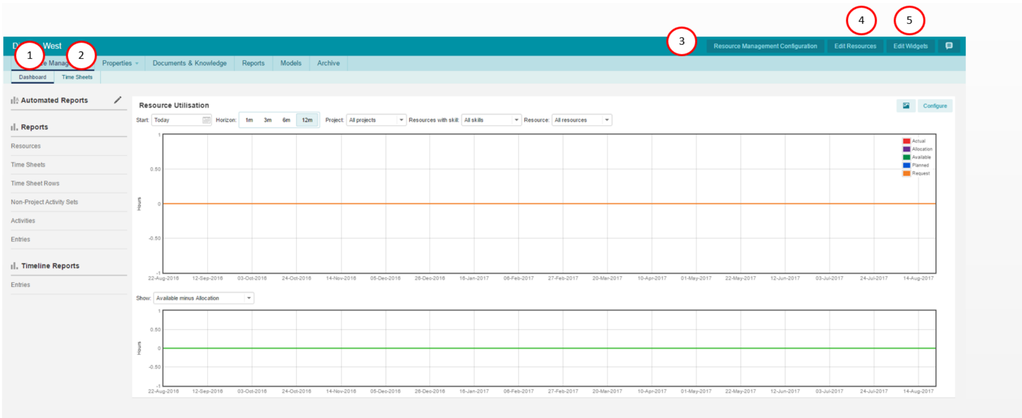
In the Time Entry module several basic functions are available: Navigation 21, Search 22, Reporting 47, Working with views 23, Working with widgets 31, Messaging 68.

Time Entry supports the time entry process: defining, sending, approving and re-opening time sheets.

The main features of the Time Entry module are:

- Defining the time sheet (admin only).
- Determine the approval process: Project Manager and/or Line Manager approval or automatic approval (admin only).
- Monitor time sheets (i.e. new, waiting for approval, approved)
- Approve or reject a time sheet
- Reopen a time sheet

Note: for submitting time sheets see Edit and submit a time sheet 14 and Working with the Principal Toolbox App.



1. Subtab **Dashboard**: here you can edit widgets and configure your dashboard
2. Subtab **Time Sheets**: here you can, as a resource manager, manage your Time Sheets (create, delete and approve/reject Time Sheets)
3. **Resource Management Configuration:** here you can select Time Sheet configuration and select the Non-Project Activities
4. **Edit Resources:** here you can select the resources for your Resource Pool
5. **Edit Widgets:** Here you can edit your widgets for this page

9.1 Manage the members of your Resource Pool

Managing the members of your resource pool for Time Entry is exactly the same as managing them for Resource Management. See Manage the members of your Resource Pool 144.

9.2 Approve or Reject a time sheet

Principal Toolbox can be configured for actual hours entered on a non-project to be approved by the line manager. The **Home Page** of the line manager, on the **tab Home**, **section Time sheets to be approved by me** shows a list of all Time Sheets that have to be approved.

Time sheets to be approved by me

Week	Start Date	Owner	Remarks	Time Entry Group
21	May 23, 2016	Michiel de Groot		Time Registration

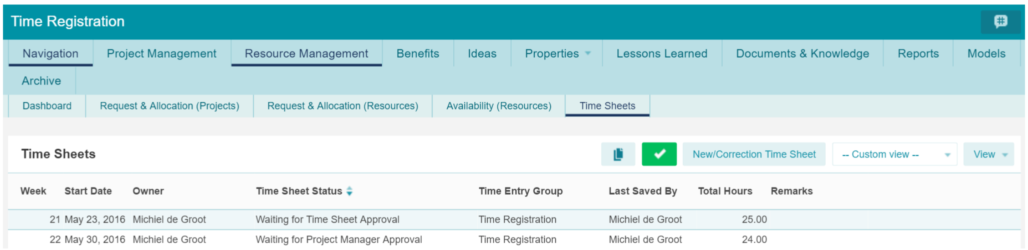
The Home Page, section Time sheets to be approved by me

<u>Approve a Time Sheet</u>

Step 1. Navigate to your **Home Page**, **tab Home**, **section Time sheets to be approved by me**. This section shows a list Time Sheets that have to be approved. Navigate to a Time Sheet by clicking on the start date.

Step 2. Review the content of the Time Sheet and click to approve, or to reject the Time Sheet. Optionally add a remark.

Note: Time Sheets to be approved can also be found on the **tab Resource Management**, **sub-tab Time Sheets**. Here it is also possible to select multiple rows and approve or reject them.



Tab Resource Management, sub-tab Time Sheets

9.3 Edit and submit a time sheet

This topic is described in the Home Page section under Edit and submit a time sheet 14
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Working with Ideas

10 Working with Ideas

Within the Idea module several basic functions are available: Navigation 21, Search 22, Working with views 23, Working with widgets 31, Document management 62.

The Idea module allows you to gather and register ideas in the earliest phase of the project life cycle. In Principal Toolbox you can use and register these ideas independent from portfolios.

The main features of the Idea module are:

- Create and register ideas
- From an idea, start one or more initiatives in one or more portfolios.
- View and report on all ideas.

The next topics cover all relevant use cases when working with ideas.

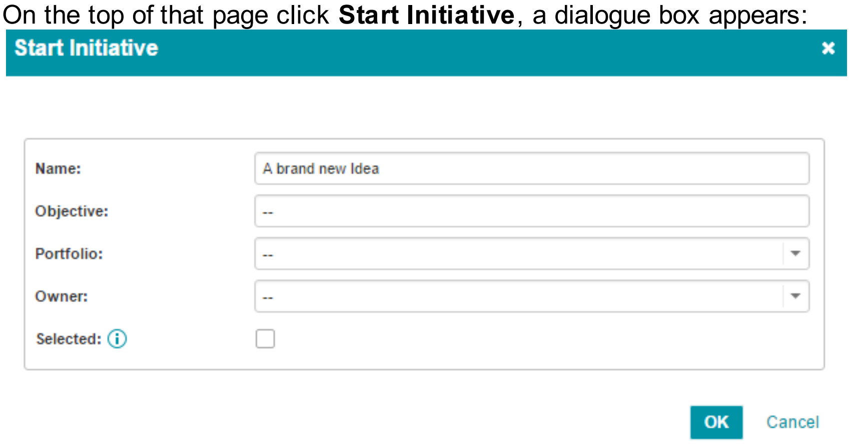
10.1 Starting an Initiative from an Idea

It is possible to start one or more initiatives from an idea. Starting an initiative from an idea does not affect the idea itself.

Starting an initiative from an idea

Step 1. Navigate to the **Idea module**, click on the name of an idea to open the details page.

Step 2. On the top of that page click **Start Initiative**, a dialogue box appears:



Step 3. Enter the details:

- Name: the name of the initiative.
- Objective: the objective of the initiative.
- Portfolio: select the portfolio in which to create the initiative.
- Owner: this user gets access to the initiative, without getting access to the entire portfolio.
- Selected: check box to make the initiative appear in the active portfolio (see Using scenario planning on a portfolio 95).

Step 4. Click **OK**, the initiative is created and appears in the selected portfolio.

Working with Benefits

11 Working with Benefits

Within the Benefits module several basic functions are available: Navigation 21, Search 22, Working with views 23, Working with widgets 31, Document management 62, Messaging 68, Working with the archive 67, Creating items 53, Viewing the change history 68.

The Benefits module allows you to create and monitor benefits and goals. It supports getting the benefits from projects and programmes.

The main features of the Benefits module are:

- Create and define Benefits and Goals.
- Monitor and manage Benefits and Goals.
- View and report on project and programme contributions to Benefits.

The next topics cover all relevant use cases when working with Benefits.