

CA Clarity™ PPM

Accelerator for PRINCE2™ Product Guide v2.0.00



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Chapter 1: PRINCE2 Accelerator

This section contains the following topics:

[Why Use the PRINCE2 Methodology?](#) (see page 7)

[PRINCE2 Accelerator Overview](#) (see page 9)

[How the Document Review and Approval Process Works](#) (see page 10)

Why Use the PRINCE2 Methodology?

PRINCE2 is a project management methodology consisting of various processes and controls that you can apply through the lifecycle of a project. You can use PRINCE2 to identify the roles involved in a project and the tasks to assign to the roles and when. The set of processes and controls used by the PRINCE2 methodology help you structure your project and identify the type of information needed throughout the project lifecycle.

The PRINCE2 methodology also helps you divide the project into manageable stages, allowing you to plan ahead more realistically, and call on your resources at the time they are most required. By incorporating the PRINCE2 methodology in the management of your projects, you can get the following:

- A valid business case for your project that is thoroughly reviewed.
- A defined organization structure for the project management team.
- The involvement of management and stakeholders at the right time during the project lifecycle.
- A controlled and organized project structure with regular reviews of progress against original plan and the business case.
- The flexibility to apply the controls and processes at a level appropriate to the project. PRINCE2 can be applied to any project.
- A common language for all participants in the project. The various roles and responsibilities involved in a project are fully described and are adaptable to suit the complexity of the project and skills of the organization.

How to Use the PRINCE2 Methodology

A variety of ways exist for an organization to implement and manage their projects using the P2 methodology. For example, consider a financial institution that handles everything to do with banking. They are headquartered in the U.K. but have several offices in different countries. They have a project management office that includes a PRINCE2 certified project manager and project support staff. They are currently in the process of adopting PRINCE2 methodology. The PRINCE2 project manager requires to create various reports (controls) throughout the various stages of the project. The goal is to have the reports reviewed and approved in a timely manner and any requests for changes to the reports sent back immediately to the project manager.

The following are some sample workflows involving different PRINCE2 players that can be associated with the above scenario:

Flow 1: PRINCE2 Project Manager Creates a Report

1. Project manager creates a PRINCE2 report in CA Clarity PPM and submits for review.
2. Project manager initiates the document review and approval process manually.
3. Project Board members receive a notification to review the report.
4. Various Project Board members review and approve the report.
5. Any changes needed are communicated back to the project manager.
6. Project manager views report status from the PRINCE2 Dashboard, Project Report Status portlet.
7. If report is rejected, project manager makes changes and resubmits the report.

Flow 2: Project Board Member Reviews a Report

1. Project Board member receives a notification asking them to review a specific report.
2. Project Board member navigates to the Action Items portlet in the CA Clarity PPM Organizer.
3. Project Board member selects the appropriate action item and drills down to the actual report.
4. Project Board member reviews the actual report contents and either approves or rejects report.
5. The approval status of the report changes and is reflected in Reports list view portlet, report properties page, and Project Report Status portlet.

Flow 3: PRINCE2 Senior Executive/Senior User Drills Down to a Project from the Executive Dashboard

1. In CA Clarity PPM, senior executive navigates to the Executive Dashboard.
2. Senior executive selects the Project Status page.
3. Senior executive sees a project that is running behind schedule and falling behind the desired run rate for products completed.
4. Senior executive selects the specific project to drill down for more details.
5. At the project level, senior executive navigates to the task list and selects the product breakdown structure filter.
6. Senior executive drills down to the product details and notices that no one is allocated to a particular product.
7. Senior executive makes an informed decision on an appropriate response once a checkpoint report is routed for review and approval for this specific project.

PRINCE2 Accelerator Overview

CA Clarity PPM Accelerator for PRINCE2 (PRINCE2 Accelerator) is an add-in that consists of a set of dashboards, portlets, subpages, and processes that allow you to reflect your interpretation and implementation of the PRINCE2 project management methodology. This add-in provides a subset of all the forms from the official PRINCE2 content provided by the Office of Government Commerce (OGC).

Go to http://www.ogc.gov.uk/methods_prince_2.asp for more information about the PRINCE2 methodology.

Note: To download additional PRINCE2 document templates for free, go to <http://www.prince2.com/prince2-downloads.asp>.

The PRINCE2 Accelerator includes the PRINCE2 Project Template. Associate the projects with this template to access the following project subpages exclusive to PRINCE2:

- PRINCE2™
- Product Description
- Project Initiation Document
- Stage Plan
- Checkpoint Report
- Highlight Report
- Exception Report
- End Stage Report

■ Lessons Learned Report

The PRINCE2 project management methodology is a product-based planning approach. With the PRINCE2 Accelerator, you can track the progress of project tasks as individual products. The add-in lets you label the CA Clarity PPM project tasks as products and manage them as you would manage products in a PRINCE2 methodology.

The add-in provides a starting point to implement the PRINCE2 methodology into your existing project management system. Also, helps customize to the unique requirements of your organization. The content and pages that come with PRINCE2 Accelerator are configurable using Studio. You can add attributes and forms, or let the CA Technology Services (CATS) engagement manager assist you.

You can roll up PRINCE2 projects into other programs and portfolios like you can other CA Clarity PPM projects. They are displayed in various portfolio and program dashboards and dashboard layouts, and in CA Clarity PPM reports.

How the Document Review and Approval Process Works

A series of reports act as controls throughout the project lifecycle. As each report is completed, the Project Board review and approval process is started to review the various reports. The document review and approval process assumes that a PRINCE2 project has already been created and the reports are ready to be submitted.

The following tasks are involved in the creation of the reports involved in the management of a typical PRINCE2 project:

1. [Describe the product to deliver](#) (see page 23)
2. [Formally initiate the project](#) (see page 25)
3. [Create project stage plans](#) (see page 28)
4. [Create checkpoint report](#) (see page 31)
5. [Create a highlight report](#) (see page 33)
6. [Create an exception report](#) (see page 36)
7. [Create an end stage report](#) (see page 38)
8. [Create a lesson learned report](#) (see page 41)

Note: As the PRINCE2 project manager completes and submits each report, the Project Board review and approval process is started automatically to review the report. The attributes on the report properties page become locked and can be edited again only if the report is rejected. The Project Board members (associated with the Senior Supplier access group) play a key role in reviewing the reports.

Project Board Review and Approval Process Workflow

The review and approval process involves the following for each completed PRINCE2 report:

1. The PRINCE2 project manager submits the report for review and approval to the Project Board members.
2. The Project Board review process is initiated.
3. The Project Board members receive a notification to conduct a review of the report. The Project Board members view their pending review items on the Action Items portlet from the overview page.
4. As Project Board members review the report, comments and requests for clarifications are entered in the Notes page for that action item, or exchanged externally from CA Clarity PPM.
5. The Project Board members either approve or reject the report from the Action Item Details page.
 - If one member rejects the report, the status is immediately updated to show "Rejected" on the report properties page. The review process ends at this point. The project manager must make any desired changes and resubmit the report for review.
 - If all members review and approve the report, the status of the report changes to "Approved". The process ends at this point.
6. The PRINCE2 project manager receives a notification about the change in the report status (whether approved or rejected).
7. After all board members have reviewed the report, the process ends.

Chapter 2: Installation

This section contains the following topics:

[How to Install Add-Ins](#) (see page 13)

How to Install Add-Ins

This section describes the steps required to install add-ins from a .jar file so that the content is available to users. Complete the steps on your CA Clarity application server. Before installing an add-in, verify that the relevant CA Clarity PPM version is installed.

Important! If you upgrade from a previous version of the add-in, verify the compatibility chart in the add-in release notes to see if an upgrade for the add-in is required, or is optional.

The following process details how to install add-ins on your CA Clarity PPM server:

1. [Download the .iso image file](#) (see page 13).
2. [Extract the .jar file](#) (see page 14).
3. [Stop the services](#) (see page 15).
4. [Install the add-in](#) (see page 16).
5. [Start the services](#) (see page 16).
6. [Apply the add-in](#) (see page 18).

Perform the step if the add-in is installed, or CA Clarity PPM view is modified by installing the add-in.

Download the .iso Image File

All add-ins are .iso image files. The .iso image file includes a .jar file. The .jar file contains the files to install the add-in. The installer updates the existing CA Clarity PPM installation with the newly downloaded files.

To download the .iso image file, go to support.ca.com and download the .iso image to your computer, or an accessible network location.

Mount .iso Image Files Using Unix

On UNIX platforms, use the .iso image file directly through the DVD emulation provided with some of the operating environment DVD device drivers. For Linux systems, you can use the .iso image by mounting it on the .iso file system driver.

To mount the .iso image file using Unix, open a command prompt and issue a command similar to the following:

```
mount -t .iso9660 -o ro,loop,dev filename.iso /mnt/CACd
```

The command mounts the .iso image file (filename.iso) at the /mnt/CACd mount point. Hence, the DVD contents are accessible through the /mnt/CACd directory.

Write .iso Image Files to DVDs

The .iso image files are DVD images containing exact binary copies of the original DVDs. Depending on the operating environment, you can use the files to create product DVDs, or you can use them in their original format.

A DVD writer and mastering software are required to recreate product DVDs. Most DVD authoring applications accept a preformatted .iso image file and write the contents of the ISO image to a DVD. This step generates an exact copy of the product DVD.

See the documentation on your DVD writer for more information about how to write .iso image files to DVDs.

Note: Neither Windows nor WinZip recognizes the .iso file format. To access the installation files in Windows, create a DVD with the .iso image file using a DVD Writer. Or, use a third-party software program like IsoBuster or Undisker as an .iso image file extractor. If you prefer not to create a DVD, use an .iso extractor program to extract .iso image files to a local file system.

Extract the .jar File

Once you access the .iso image file, extract the .jar file to a temporary directory location on the CA Clarity application server to complete the installation process.

The .jar file includes the following files:

install.sh

The UNIX installation script.

install.bat

The Windows installation script.

install.xml

The Ant installation script.

package

The directory of updated files.

tools

The directory of supporting files.

Follow these steps:

1. Open a command prompt, and issue the following command:
`jar -xvf <filename>`

The command extracts the contents of the .jar file to the same location where the .jar file resides.

2. For a UNIX environment, issue the following command:
`chmod +x install.sh`

This grants execution privileges for the install script.

Stop the Services

Before applying the add-ins, stop the CA Clarity Application (app) and CA Clarity Background (bg) services. Restart them from Clarity System Administration after having applied the add-in to CA Clarity PPM.

The following sections explain how to stop the services in different server configurations.

Important! If deployed on the server, do not stop the Clarity System Administration (nsa), the Database (db), the Beacon, and the Reports (reports) services.

Stop Services Using Apache Tomcat

Do the following to stop the CA Clarity Application (app) service and CA Clarity Background (bg) services that use Apache Tomcat as your CA Clarity application server.

Follow these steps:

1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app) and the CA Clarity Background (bg) service check boxes.
4. Click Stop.

Stop Services Using Oracle WebLogic/IBM WebSphere

Do the following to stop the application and background services in a configuration that uses the Oracle WebLogic, or IBM WebSphere as your CA Clarity application server.

Follow these steps:

1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app), and the CA Clarity Background (bg) check boxes.
4. Click Stop.
5. Stop CA Clarity System Administration and applications using the application server administration console.

See the J2EE vendor documentation for more information.

Install the Add-In

The following procedure installs the updates to objects, reports, and the database.

Important! Back up your CA Clarity PPM installation before installing this add-in so that you can restore the application to the prior version, if necessary. When you install an add-in, you can overwrite your customized views for out-of-the-box CA Clarity PPM objects, such as projects. If your organization has customized views, consider installing in a test environment before installing this add-in into your production environment. Once you have installed the add-in, you cannot uninstall it.

Follow these steps:

1. Open a Command Prompt window at the directory location where you extracted the .jar files, and issue the following command:
`install`
2. Press Enter.
The installation process begins.
3. Follow the on-screen directions to complete the add-in installation.

Start the Services

Stop the CA Clarity Application (app) and CA Clarity Background (bg) services before applying the add-in. Restart them after applying the add-in. Use CA Clarity System Administration to stop the application.

The following sections explain how to start the services in different server configurations.

Start Services Using Apache Tomcat (Single Server)

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses the Apache Tomcat as your CA Clarity application server. Also, all the services require to run on a single server.

Follow these steps:

1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app) and the CA Clarity Background (bg) service check boxes.
4. Click Start.

Start Services Using Apache Tomcat (Multiple Servers)

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses Apache Tomcat as your CA Clarity application server. All the services require distributing across multiple servers.

Follow these steps:

1. Log in to CA Clarity System Administration.
2. Open Home and click All Services.
3. Turn off any remote app and bg services.
4. Open the Distribution menu, and click Distribute All.
5. Select remote servers and click Distribute. Wait until the distribution is complete.
6. Open Home, and click All Services.
7. Select the CA Clarity Application (app) and CA Clarity Background (bg) service check boxes, and click Start.

Start Services Using Oracle WebLogic/IBM WebSphere

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses Oracle WebLogic, or IBM WebSphere as your CA Clarity application server.

Follow these steps:

1. Log in to CA Clarity System Administration.

2. Open the Installation menu, and click Install and Upgrade.

The install and upgrade database page appears.

3. Click Package Application Ear.

4. Click Create Package.

The application creates a package and the niku.ear.

5. Deploy the (niku.ear) package using the J2EE application server administration console.

Apply the Add-In

You can review changes to installed add-in items and review new add-in items using the details page for an add-in. The details page is available from the add-in page in Studio. If you have configured views when you install the add-in, the configurations remain and are not overwritten. You can decide which views to apply. If you are upgrading to the current add-in version, use the page to select new or modified items and apply them. Applying a view overwrites the configuration of the view.

Note: When you apply content from the add-in page, the access rights of your CA Clarity PPM system administrator user (admin) are used to install the content. Before using the add-in page to install content, grant or verify that the admin user has the appropriate Edit access rights for the type of content you are applying. For example, if you are applying project-based portlets, verify that the admin user has the Project - Edit Management – All access right.

This page lists all of the items that are included with the add-in. The following columns display on the page:

Status

Indicates if the add-in item is applied or not in CA Clarity PPM.

Values:

- Not Installed. New items that are new to the add-in version or that you did not apply from a previous add-in version.
- Upgrade Ready. Modified items that you applied from a previous add-in version and then configured. An update to the item is included in the current add-in version.

Important! Consider the configurations you have made to items before applying them. Applying modified items overwrites your configurations.

- Installed. Items that are installed.

Type

Indicates the item type.

Values: Object, Lookup, Tab, Query, Portlet, Page, Custom View, Group, Menu, Project, Process, Role, and Report/Job

ID

Displays the add-in item code, which is the identifier of the applied add-in item.

Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-ins.

The add-ins page appears.

3. Click the name of the add-in to apply items.

The details page for the add-in appears.

4. Review the items in the list and select for applying.

Note: By default, when you upgrade to the current add-in version, the items that are new or modified are selected.

5. (Upgrade Only) For all active process instances with the "Upgrade Ready" status, cancel and delete the process instance.

Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.

6. Click Apply.

Note: If a selected item has dependencies on other items, the dependencies are also updated.

A list of updated items displays on the confirmation or install page.

7. Click Yes.

If a user has previously changed an item listed on the confirmation or install page, publish the item before displaying the update to the users.

See the *Studio Developer's Guide* for more information.

Chapter 3: Create PRINCE2 Project

This section contains the following topics:

[Associate a Project with a PRINCE2 Template](#) (see page 21)

[Define Prince2 Properties for a Project](#) (see page 22)

[Create Product Descriptions](#) (see page 23)

[Create Project Initiation Documents](#) (see page 25)

[Create Stage Plan](#) (see page 28)

[Create Checkpoint Report](#) (see page 31)

[Create Highlight Report](#) (see page 33)

[Create Exception Report](#) (see page 36)

[Create End Stage Report](#) (see page 38)

[Create Lessons Learned Report](#) (see page 41)

[Track a Project Task as a Product](#) (see page 43)

Associate a Project with a PRINCE2 Template

You require associating a project with the PRINCE2 template to flag it as a PRINCE2 project. The template adds PRINCE2 specific subpages to the project.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open the Portfolio Management menu, and click Projects.
The list page appears.
2. Click New from Template.
The select project template page appears.
3. Click the Prince2 Project Template and click Next.
The create page appears.
4. Complete the required fields on the page.
5. Save the project.
The projects page appears listing the new project.

Define Prince2 Properties for a Project

After creating a PRINCE2 project, you must define the PRINCE2-specific properties such as the project stages, the board members, and senior users for that project. You require PRINCE2 Project Manager or PRINCE2 Administrator access rights to define PRINCE2 project properties.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click PRINCE2™.
The project properties page appears.
3. Define the following PRINCE2 fields:

PRINCE2 Stage

Defines the PRINCE2 stage that currently applies to the project. See the OGC PRINCE2 reference workbook for descriptions. Select one of the following stages from the drop-down:

- Starting Up a Project (SU)
- Initiating a Project (IP)
- Controlling a Stage (CS)
- Managing Stage Boundaries (SB)
- Closing a Project (CP)

Project Board Members

Identifies the Project Board members who have the authority to review, reject, or approve a document, report, or plan submitted as part of the PRINCE2 process. Click the Browse icon to select project board members. To remove a resource, select the Delete icon.

Senior Executives/Senior Users

Identifies the senior executives and senior users for this project. Select the Browse icon to select senior executive resources for this specific project. To remove a resource, select the Delete icon. As a default, the processes are not configured with action items assigned to these senior executives or senior users. However, you can customize your PRINCE2 implementation to do so.

Create Product Descriptions

You can create a product description for the PRINCE2 project that you are planning to develop. This serves as a control document written as part of the project planning process. Creating a product description allows you to define the following:

- Project deliverable
- Standards to be used in the project creation
- Quality criteria to be applied
- Initial checklist for checking the quality of the finished product

Follow these steps:

1. Open the PRINCE2 project.
The project properties page appears.
2. Open the Properties menu and click Product Description.
The product description page appears.
3. Click New.
The create page appears.
4. Define the following fields and save the changes.

Title

Defines the unique name of the product description report.

ID

Displays the PRINCE2 ID automatically generated for the product description.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.

- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Purpose
- Composition
- Derivation
- Format and Presentation
- Allocated To
- Quality Check Requirements
- Quality Criteria
- Quality Method
- Quality Tolerance

5. Save the changes.

The list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Title

Displays the product description title. Click a product description title to drill to the product description page. If the product description is currently in review, the fields are read-only.

PRINCE2 Stage

Displays the current PRINCE2 stage for this project.

Approval Status

Displays the current approval status of this product description report.

Report Date

Displays the date this product description was created.

Submitted Date

Displays the date this product description was submitted for review.

Approval Date

Displays the date this product description was approved. If not yet approved, this field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Purpose

Displays the purpose of the product description report.

Create Project Initiation Documents

The project initiation document brings together the key information to start the project on a sound basis. The document is used to convey the information to all persons interested in the project. The main purpose of this document is to gather the information for the project to answer the What, Why, How, Where and How Much questions.

Once the Project Board members approve the document, the project initiation document provides the baseline for the project and becomes read-only. The document is then used as a reference whenever a major decision is made about the project. At the conclusion of the project, the document is used to measure if the project is managed successfully and delivered an acceptable outcome.

Project initiation documents include the following sections:

- Business Needs
- Constraints, Assumptions & Exclusions
- Scope and Initial Plan

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click Project Initiation Document.
The project initiation document properties page appears.
3. Click New.
The create page appears.
4. Define the following fields and save the changes:

Title

Defines the unique name for the project initiation document.

ID

Displays the PRINCE2 ID automatically generated for the document.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Background
- Project Objectives
- Business Case
- Business Reason
- Business Reason Details
- Attachments
- Constraints
- Assumptions
- Exclusions
- Dependencies
- Alternatives Considered
- Project Scope
- Other Deliverables (Products)
- Initial Risk Log
- Project Organization Structure
- Project Organization Structure Attachments
- Project Quality Plans
- Acceptance Criteria
- Initial Project Plan
- Project Controls
- Exception Process
- Contingency Plans

5. Save the changes.

The project properties list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Title

Displays the project initiation document title. Click the title to drill to the project initiation properties page. If the project initiation document is currently in review, the fields are read-only.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Approval Status

The current approval status of the report.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Submitted Date

Displays the date this project initiation document is submitted for review.

Approval Date

Displays the date this project initiation document is approved. If not yet approved, this field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is ≥ 5 and < 10 days
- A red stoplight appears if Days in Review is ≥ 10 day

Business Reason

Displays the business reason for the project initiation document report.

Create Stage Plan

The stage plan is used as the basis for project management control throughout the length of the project—from initiation to conclusion.

The stage plan helps you do the following:

- Identify all the products that each project stage must produce
- State how and when a stage objectives are to be achieved
- Show the deliverables, activities, and resources required
- Identify the stage control, reporting points, and frequencies
- Provide a baseline against which stage progress can be measured
- Record the stage tolerances, specify quality controls, and identify the resources needed for them

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click Stage Plan.
The stage plan properties page appears.
3. Select New.
The create page appears.
4. Complete the following fields and save the changes:

Plan

Defines the name of the stage plan.

ID

Displays the PRINCE2 ID. The ID automatically generated for the stage plan.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 workbook for descriptions of the following fields:

- Plan Description
- Plan Prerequisites
- Quality Plan
- External Dependencies
- Tolerances
- How will the Plan be Monitored and Controlled?
- Reporting
- Planning Assumptions
- Graphical Plan
- Product Description for Major Products

5. Save the changes.

The stage plan properties list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Plan

Displays the stage plan name. Click a plan name to drill to the stage plan properties. If the stage plan is currently being reviewed, the attributes on this page appear as read-only.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project.

Approval Status

Displays the current approval status of this stage plan.

Report Date

Displays the date of creating the stage plan.

Submitted Date

Displays the date of submitting the stage plan for review.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Approval Date

Displays the date of approving the stage plan. If not yet approved, this field is empty.

Plan Description

Displays the plan description for the stage plan report.

Plan Prerequisites

Displays the plan prerequisites for the stage plan report.

Create Checkpoint Report

Create a checkpoint report to review the work status of each team member at a frequency (weekly, bi-weekly, and so on) defined in the stage plan. The checkpoint report can be derived from previous checkpoint reports and stage plans with verbal reports from team members. An objective of the report is to check all aspects of the project team work against the plan to ensure that there are no unlikely risks or issues that can arise.

Make sure the report covers every item (task or product) planned for the period even if no work has started yet. It must also cover the work of every team member working to an agreed schedule. Refer back to the last checkpoint report to make sure that you have addressed any outstanding or unresolved issues.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click Checkpoint Report.
The checkpoint report properties page appears.
3. Click New.
The create page appears.
4. Edit the following fields and save the changes:

Report

Define the name of the checkpoint report.

ID

Displays the PRINCE2 ID automatically generated for the report.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

Refer to the PRINCE2 Workbook for descriptions of the following fields:

- Period Covered
- Follow-Ups from Previous Reports
- Products Completed
- Activities Performed
- Quality Work Carried Out
- Actual or Potential Problems/Deviations From Plan
- Work Planned for The Next Period
- Products to be Completed During Next Period

5. Save the changes when done.

The checkpoint report list page of project properties appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Report

Displays the checkpoint report name. Click a report name to drill to the checkpoint report properties page. If the report is currently in review, the fields on the page appear as read-only.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project.

Approval Status

Displays the current approval status of the report.

Report Date

Displays the date of creating the report.

Submitted Date

Displays the date of submitting the report for review.

Approval Date

Displays the date this report was approved.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Period Covered

Displays the period covered by this report.

Products Completed

Displays the products completed.

Products to be Completed During Next Period

Displays the products planned to be completed during the next period.

Create Highlight Report

Create a Highlight Report to provide Project Board members and other stakeholders with a summary of the PRINCE2 stage status at intervals defined by the project board.

The Project Board uses the report to monitor progress at both the individual stage-level and overall project level. The project manager uses it to inform and seek advice from the project board on any potential problems.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu and click Highlight Report.
The highlight report page appears.
3. Click New.
The create page appears.
4. Define the following and save the changes:

Report Name

Defines the name of the highlight report.

ID

Displays the PRINCE2 ID automatically generated for this report.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Budget Status
- Schedule Status
- Risk Status
- Period Covered
- Products Completed During the Period
- Actual or Potential Problems and Risk Update
- Products to be Completed During Next Period
- Budget and Schedule Impact of any Changes
- Tolerance Situation

5. Save the changes.

The highlight report list page displays the following fields. To get the latest status, refresh the page using the browser Refresh option.

Report

Displays the report name. Click a report name to drill to the properties page. If the report is currently being reviewed, the attributes on the page appear as read-only.

PRINCE2 Stage

Displays the current PRINCE2 Stage for the project.

Approval Status

Displays the current approval status for the report.

Report Date

Displays the date of creating the report.

Submitted Date

Displays the date of submitting the report for review.

Approval Date

Displays the date of approving the report. If not approved, the field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Budget Status

Displays the budget status for the report.

Schedule Status

Displays the schedule status for the report.

Risk Status

Displays the risk status for the specific report.

Period Covered

Displays the period covered by the report.

Products Completed During the Period

Displays the products completed for the period covered by the report.

Create Exception Report

The PRINCE2 project manager creates an Exception report when a project team, stage, or plan appears to exceed tolerance levels set by the Project Board members. The report serves to both inform the Board members of the situation and obtain direction from them.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click Exception Report.
The exception report page appears.
3. Click New.
The create page appears.
4. Define the following fields and save the changes:

Report Name

Define the name of the exception report.

ID

Displays the PRINCE2 ID automatically generated for this report.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Description of Deviation
- Cause of the Deviation
- Consequences of the Deviation
- Available Options
- Options Appraisal
- Project Manager's Recommendations

5. Save the changes.

The exception report list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Report

Displays the report name. Click a report name to drill to the properties page. If the report is currently being reviewed, the fields on this page are read-only.

PRINCE2 Stage

Displays the current PRINCE2 Stage for the project.

Approval Status

Displays the current approval status for the report.

Report Date

Displays the date of creating the report.

Submitted Date

Displays the date of submitting the report for review.

Approval Date

Displays the date of approving the report. If not approved, the field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Description of Deviation

Displays the description of deviation for the report.

Cause of the Deviation

Displays the cause of the deviation for the report.

Create End Stage Report

The PRINCE2 methodology involves dividing the project phases into discreet stages. At the end of each stage, the Project Board assesses the progress of the project to decide if they should proceed to the next stage.

The End Stage report provides progress update about a PRINCE2 project to the Project Board members using the following:

- A summary of the progress to-date
- The overall project situation
- Details based on which next steps for the project can be decided

The Project Board uses this information to approve, ask for a revision, amend the scope, or stop the project.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. Open the Properties menu, and click End Stage Report.
The end stage report page appears.
3. Select New.
The create page appears.
4. Define the following fields and save the changes:

Report Name

Displays the name of the end stage report.

ID

Displays the PRINCE2 ID automatically generated for the report.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Current Stage Plan with Actuals
- Performance against Stage Tolerances
- Plan Outlook
- Plan Outlook Details
- Business Case Review
- Risk Review
- Project Issue Situation
- Quality Statistics
- Project Manager's Report on Events that Affected
- Stage Response

5. Save the changes.

The end stage report list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Report

Displays the report name. Click a report name to drill to the properties page. If the report is currently being reviewed, the fields on the page are read-only.

PRINCE2 Stage

Displays the current PRINCE2 Stage for the project.

Approval Status

Displays the current approval status for the report.

Report Date

Displays the date of creating the report.

Submitted Date

Displays the date of submitting the report for review.

Approval Date

Displays the date of approving the report. If not approved, the field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Plan Outlook

Displays the current plan outlook for the report.

Plan Outlook Details

Displays the current plan outlook details for the report.

Create Lessons Learned Report

Create a Lessons Learned report to pass on any lessons learned from the current project that can be usefully applied to other future projects.

The data in this report can be used by groups such as quality assurance that are responsible for the quality management system, or for refining, changing, and improving the standards.

Follow these steps:

1. Open the PRINCE2 project.
The properties page appears.
2. From the Properties menu, and click Lessons Learned.
The lessons learned page appears.
3. Click New.
The create page appears.
4. Define the following fields and save the changes:

Report Name

Defines the name of the lessons learned report.

ID

Displays the PRINCE2 ID automatically generated for the report.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. This field displays only after saving the changes.

Report Date

Displays the current date, or the date of creating the report. This field displays only after saving the changes.

Approval Status

Displays the current approval status of this report. This field displays only after saving changes. One of the following stoplights displays:

- New (gray stop light). The default selection when the report is not yet submitted for review.
- Submit For Review (yellow stoplight). Displays once the report is submitted for review.
- Approved (green stoplight). Displays if the report is approved during the review process.
- Rejected (red stoplight). Displays if the report is rejected during the review process.

Submit for Review

Initiates the document review and approval process for this PRINCE2 control if selected. Submit the report after selecting the check box. This field displays only after you save changes.

See the PRINCE2 Workbook for descriptions of the following fields:

- Management and Quality Processes that Went Badly
- Management and Quality Processes that Went Well
- Management and Quality Processes that Were Lacking
- Analysis of Project Issues and Results
- Assessment of Technical Methods and Tools Used
- Descriptions of any Abnormal Events that Caused Deviations
- Recommendations for Enhancements/Modifications of Project Management
- Statistics/Notes on How Effective Quality Reviews and Other Tests were in Error Tapping
- Useful Measurements of How Much Effort was Required to Create Various Products

5. Save the changes.

The lessons learned list page appears displaying the following fields. To get the latest status, refresh the page using the browser Refresh option.

Report

Displays the report name. Click a report name to drill to the lessons learned properties page. If the report is currently being reviewed, the fields on the page are read-only.

PRINCE2 Stage

Displays the current PRINCE2 Stage for the project.

Approval Status

Displays the current approval status for the report.

Report Date

Displays the date of creating the report.

Submitted Date

Displays the date of submitting the report for review.

Approval Date

Displays the date of approving the report. If not approved, the field is empty.

Days in Review

Displays the number of days passed from the day the report is submitted for review with the applicable stoplight indicator. This field is empty if the form was rejected or approved, or if the form is not yet submitted for review. The following determines which stoplight appears:

- A green stoplight appears if Days in Review is >0 and < 5 days
- A yellow stoplight appears if Days in Review is >= 5 and < 10 days
- A red stoplight appears if Days in Review is >= 10 day

Management and Quality Processes that Went Well

Displays the current management and quality processes that went well.

Track a Project Task as a Product

PRINCE2 Accelerator allows you to track the progress of a task as a product during the project life cycle. You can also create your own filter (product breakdown structure) to track the development of the task as a product. Creating a filter allows you to see all tasks flagged as products and then see the full product breakdown structure.

Since the flagged task is also displayed in a standard work breakdown structure, you can map this task (or product) to different tasks.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open your PRINCE2 project.

The properties page appears.

2. Click Tasks.
The list page appears.
3. Click New.
The create page appears.
4. Enter the required details, and save.
The Product check box appears at the top of the General section.
5. Select the Product check box to flag the task as a product, and save.
The task list page appears with the new task listed as a product.

Create Product Filter

From your tasks list, filter only on tasks that are labeled as "products" to create a Product Breakdown Structure. To do this, create a filter to display tasks labeled as "products" only.

Follow these steps:

1. Open your PRINCE2 project.
The properties page appears.
2. Click Tasks.
The list page appears.
3. Click the Expand Filter link.
4. In the Task Filter portlet, click the Build Power Filter link next to Power Filter.
The filter page appears.
5. From the Object drop-down, click Task.
The Field drop-down appears.
6. From the Field drop-down, click Product.
The Operator and Constant fields appear.
7. For Operator, select "=", for Constant, select Yes, and click Add.
The following expression is added in the Expression box:
`task.pr2_pbs == 1`
8. Click Evaluate to evaluate the expression, and save.
This saves the expression as a power filter, and the task list page appears.
9. Click the Save Filter option. Or, click Expand Filter to display this option.
The save filter page appears.

10. Enter a desired name for the filter. Selecting the Default option renders the new filter as the default for the task list.

The Filter drop-down on the Task Filter portlet now lists the newly created filter for 'product'. Select the filter to show only the tasks flagged as 'products'.

Chapter 4: PRINCE2 Management Controls

This section contains the following topics:

[Overview of Management Controls](#) (see page 47)

[View PRINCE2 Reports](#) (see page 47)

[View PRINCE2 Stage Plans](#) (see page 50)

[Review Risks, Issues, and Change Requests](#) (see page 51)

[View Lessons Learned Reports](#) (see page 54)

[Executive Dashboard](#) (see page 55)

Overview of Management Controls

Use the PRINCE2 Management Controls to get an aggregated view of all the PRINCE2 controls and projects in an organization. The PRINCE2 Dashboard provides project level view for the selected report.

The following management controls are available:

- Reports
- Stage Plan
- Risks, Issues and Change Requests Logs
- Lessons Learned
- Executive Dashboard

Note: The Risks, Issues, and Change Requests Logs list the risks, issues, and change requests logged against PRINCE2 projects only. Risks, issues, and change requests logged against projects using other methodologies are not displayed from these management controls.

View PRINCE2 Reports

The PRINCE2 reports are categorized by the following types and are grouped by their corresponding tabs:

- Highlight Reports. The Highlight Reports tab displays all highlight reports created for all PRINCE2 projects within the organization.
- Checkpoint Reports. The Checkpoint Reports tab displays all checkpoint reports created for all PRINCE2 projects within the organization.
- Exception Reports. The Exception Reports tab displays all exception reports created for all PRINCE2 projects within the organization.

- End Stage Reports. The End Stage Reports tab displays all end stage reports created for all PRINCE2 projects within the organization.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Select Reports.

The highlight reports page appears by default listing the highlight reports for all PRINCE2 projects.

2. Select the tab for a particular report type to display that report type for all PRINCE2 projects.

The list page for the particular report type appears. By default, the contents on this page are sorted first by Project and then by Report Date. The following fields are available:

Project

Displays the name of the PRINCE2 project associated with the report. Click a project name to drill-down to the project properties page.

Report Date

Displays the date of creating the report.

Report Name

Displays the name of the report.

Approval Status

Displays the current approval status of the report.

Project Manager

Displays the project manager associated with the report.

Submitted Date

Displays the date of submitting the report for review.

Period Covered

Displays the period covered by the report.

Start Date

Displays the schedule start date from the project schedule page.

End Date

Displays the schedule end date from the project schedule page.

PRINCE2 Stage

Displays the current PRINCE2 stage of the associated project. The shaded area indicates the project stage. The color of the shaded area corresponds to the schedule Status field.

Values:

- SU. Starting up a Project
- IP. Initiating a Project
- CS. Controlling a Stage
- SB. Managing Stage Boundaries
- CP. Closing a Project

Highlight Report Details

The following fields are specific to the Highlight Reports list page:

Schedule Status

Displays the current schedule status of the specific report. If the project is not yet baselined and the schedule status is undefined, a white diamond icon appears.

- On Track (green diamond icon)
- Late (<10 days; yellow diamond icon)
- Late (>10 days; red diamond icon)

Risk Status

Displays the current risk status attribute of the specific report. If the project is not yet baselined and the risk status is undefined, a white diamond icon appears. Otherwise, one of the following appears:

- Low Risk (green diamond icon)
- Medium Risk (yellow diamond icon)
- High Risk (red diamond icon)

Checkpoint Report Details

The following fields are specific to the Checkpoint Reports list page:

Current Period: Products Completed

Displays the products completed defined in the report.

Next Period: Products to be Completed

Displays the products planned to be completed during next period defined in the report.

Exception Report Details

The following field is specific to the Exception Reports list page:

Description of Deviation

Displays the description of deviation as defined in the report.

End Stage Report Details

The following field is specific to the End Stage Reports list page:

Project Plan Outlook

Displays the plan outlook defined in the report.

View PRINCE2 Stage Plans

You can see an aggregated view of all the stage plans created for all PRINCE2 projects for an organization. To see an aggregated view of all stage plans, open the PRINCE2™ Management Controls menu, and click Stage Plan. The stage plan page appears listing the stage plans for all PRINCE2 projects:

The following fields appear on the page:

Project

Displays the name of the project associated with the stage plan. Click a project name to drill to the project properties page.

Plan Date

Displays the date of creating the stage plan.

Plan Name

Displays the name of the stage plan. Click a stage plan name to drill to the stage plan properties page.

Approval Status

Displays the current approval status of the stage plan.

Project Manager

Displays the project manager associated to the stage plan.

Plan Description

Displays the plan description defined in the stage plan.

Plan Prerequisites

Displays the plan prerequisites defined in the stage plan.

Review Risks, Issues, and Change Requests

You can view an aggregation of all the risks, issues, and change requests logged for all PRINCE2 projects within the organization. They are grouped under the following pages:

- **Risks Log.** The Risks Log displays an aggregate of the risks logged for all PRINCE2 projects in the organization.
- **Issues Log.** The Issues Log displays an aggregate of the issues logged for all PRINCE2 projects in the organization.
- **Change Requests Log.** The Change Requests Log displays an aggregate of the change requests logged for all PRINCE2 projects in the organization.

Note: The data for the logs is derived from the Risks, Issues, and Change Requests portlets of all the PRINCE2 projects.

View Risks Log

You can see an aggregated view of all risks associated with all PRINCE2 projects in the enterprise.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Risks, Issues and Change Requests Log.

The risks log page appears listing the following fields:

Above Threshold

Displays the above threshold status stoplight for the specific risk. Risk is based on two factors (Impact and Probability) and each factor can have three values low (1), medium (2), or high (3). If the product of these two factors is greater than the Risk Threshold, then the “above threshold” flag is set to “yes” or appears selected.

See the *Administration Guide* for more information.

Probability

Displays the Probability stoplight icon based on the probability field of the risk.

Impact

Displays the Impact stoplight icon based on the impact attribute of the risk object.

Risk ID

Displays the risk ID attribute of the risk object, drilling down to the specific risk properties page.

Risk

Displays the risk name for the specific risk, drilling down to the specific risk properties page.

Project

Displays the name of the project associated to the risk, drilling down to the project properties page.

Category

Displays the category as defined for the risk.

Owner

The owner assigned to this risk. Click the Email icon to send an email using your default email client to the owner of the risk.

Target Resolution Date

The target date for resolving the risk.

View Issues Log

You can review an aggregated view of all issues associated with all PRINCE2 projects in the organization.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Risks, Issues and Change Requests Log.

The risks log page appears.

2. Click the Issues Log page.

The issues log page appears listing the following attributes:

Schedule

Displays the schedule status stoplight from the PRINCE2 project.

Priority

Displays the priority defined in the issue.

Issue ID

Displays the issue ID defined in the issue. Click an issue ID to drill down to the issue properties page.

Issue (Name)

Displays the issue name defined in the issue. Click an issue name to drill down to the issue properties page.

Project

Displays the name of the project associated with the issue. Click a project name to drill to the project properties page.

Category

Displays the category defined in the issue.

Owner

Displays the resource assigned to the issue. Click the Email icon to send an email from your default email client to the owner of the issue.

Target Resolution Date

Displays the target date for resolving the issue.

View Change Requests Log

You can review an aggregated view of all change requests associated with all PRINCE2 projects in the organization.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Risks, Issues and Change Requests Log

The risks log page appears.

2. Select the Change Requests Log page.

The change request log page appears listing the following fields:

Priority

Displays the priority spotlight from the Priority field of the change request.

Change Request ID

Displays the ID of the change request. Click a change request ID to drill to the change request properties page.

Change Request (Name)

Displays the name for the change request. Click a change request name to drill to the change request properties page.

Status

Displays the status defined in the change request.

Project

Displays the name of the project associated with the change request. Click a project name to drill to the project properties page.

Category

Displays the category defined in the change request.

Owner

Displays the resource assigned to the change request. Click the Email icon to send an email from your default email client to the owner of the change request.

Expected Close Date

Displays the expected closure date for the change request.

View Lessons Learned Reports

You can review an aggregated view of all the Lessons Learned reports created for all PRINCE2 projects within the organization.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Lessons Learned.

The following fields are listed on the page:

Project

Displays the name of the project associated to the specific report. Click a project name to drill to the project properties page.

Report Date

Displays the report date attribute of the report.

Report Name

Displays the name of the report. Click a report name to drill down to the properties of the selected report.

Submitted Date

Displays the date of submitting the report.

Approval Status

Displays the current approval status of the report.

Project Manager

Displays the project manager associated with the report.

Management & Quality Processes That Went Well

Displays the management and quality processes conforming to the report.

Management & Quality Processes That Went Badly

Displays the management and quality processes that did not satisfy the report.

Executive Dashboard

Senior executive can use the Executive Dashboard for a status summary of the status of all the PRINCE2 projects within the organization.

The Executive Dashboard includes the following portlets:

Issues and Risks Tracker

Displays the latest issues and risks identified for all PRINCE2 projects within the organization.

Project Status

Displays the general status and progress information. Includes products completed of all active PRINCE2 projects within the organization.

Projects by Stages

Displays the number and percentage of projects for each PRINCE2 stage in the PRINCE2 process model for the entire organization in a graphical pie chart.

Track Project Issues and Risks

You can track all issues and risks related to all PRINCE2 projects in the organization from the Issues and Risks Tracker portlet on the Executive Dashboard.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Executive Dashboard.

The issues and risks tracker page appears.

The following fields are displayed on the page:

Project

Displays the name of the project associated with the issue. Click a project name to drill to the project properties page.

Manager

Displays the project manager associated with the project.

PRINCE2 Stage

Displays the current PRINCE2 stage of the project associated with the issue. The shaded area of the icon indicates the project stage. The color of the shaded area corresponds to the Project Outlook attribute in the latest end stage report.

Open Issues %

Displays one of the following stoplights based on the open issues count:

- Green check mark (with percentage) if total open issues < 20 percent of total resolved and open issues
- Yellow exclamation mark (with percentage) if total resolved issues > 20 percent and < = 50 percent of total resolved and open issues
- Red X (with percentage) If total open issues > 50 percent of total resolved and open issues

Click a stoplight icon to drill to the Risks/Issues/Changes tab for the project.

Open Risks %

Displays one of the following stoplights based on the open risks count:

- Green check mark (with percentage) If total open risks < 20 percent of total resolved and open risks
- Yellow exclamation mark (with percentage) If total resolved risks > 20 percent and < = 50 percent of total resolved and open risks
- Red X (with percentage) if total open risks > 50 percent of total resolved + open risks

Click a stoplight icon to drill to the Risks/Issues/Changes page for the project.

Resolved Issues %

Displays one of the following stoplights and percentage values:

- Green stoplight (with percentage value): If total resolved issues > 50 percent of total resolved and open issues
- Yellow stoplight (with percentage value): If total resolved issues > 20 percent but < = 50 percent of total resolved and open issues
- Red stoplight (with percentage value): If total open issues < 20 percent of total resolved and open issues.

Click a stoplight icon or percentage value to drill to the Risks/Issues/Changes tab for the project.

Resolved Risks %

Displays one of the following stoplights and percentage values:

- Green stoplight (with percentage value): If total resolved risks > 50 percent of total resolved and open issues
- Yellow stoplight (with percentage value): If total resolved risks > 20 percent but <= 50 percent of total resolved and open issues.
- Red stoplight (with percentage value): If total open risks < 20 percent of total resolved and open issues.

Click a stoplight icon or percentage value to drill to the Risks/Issues/Changes tab for the project.

Report Name

Displays the report name of the associated end stage report. Click a report name to drill to the most recent end stage report for the project associated with the issue.

Plan Outlook

Displays the standard stoplight derived from the Project Outlook attribute of the latest end stage report.

- Yellow exclamation mark (with mouseover to show the actual value)
- Green check mark (with mouseover to show the actual value)
- Red X (with mouseover to show the actual value)

Click a stoplight icon to drill to the most recent end stage report for the project.

Track Project Status

You can track general status and other information related to all PRINCE2 projects in the organization from the Project Status portlet on the Executive Dashboard.

Note: A project requires tasks defined as ‘products’ for projects to appear on the portlet.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Executive Dashboard.
The issue tracker page appears.
2. Click the Project Status portlet.

The project status page appears. The following fields display on the page:

Project

Displays the name of the project associated with the status. Click a project name to drill down to the properties page.

Project Manager

Displays the project manager associated with the project.

Start

Displays the project start date.

End

Displays the project finish date.

PRINCE2 Stage

Displays the current PRINCE2 stage for the project. The shaded area indicates the stage the project is in. The color of the shaded area corresponds to the color of the Schedule (Status) stoplight.

Schedule (Status)

Displays one of the following stoplights:

- White stoplight if there is no baseline data.
- Green stoplight if the baseline finish date is on schedule (no days late)
- Yellow stoplight if the baseline finish date is ≤ 10 days late
- Red stoplight if the baseline finish date is > 10 days late

You must baseline the project for the stoplight to display a color.

Products Completed %

Displays one of the following stoplights based on the percent of products completed:

- Green stoplight and percentage value if actual products completed is > 80 percent of total products (actual + remaining products).
- Yellow stoplight and percentage value if actual products completed is > 40 percent but ≤ 80 percent of total products (actual + remaining products).
- Red stoplight and percentage value if actual products completed is < 40 percent of total products (actual + remaining products).

Click a stoplight icon to drill down to the tasks list page.

Products Remaining

Displays the count of products (tasks) that remain incomplete. Click a number to drill down to the tasks list page.

Track Projects by Stages

You can get a graphical summary of the status of all the PRINCE2 projects within the organization from the Projects by Stages portlet on the Executive Dashboard.

Note: For the Projects by Stages portlet to display any data, you must have the Audit Trail feature enabled.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Executive Dashboard.
The issue tracker page appears.
2. Click the Project by Stages portlet.
The projects by stages page appears displaying a pie chart.

The pie chart uses a color scheme to represent projects in various PRINCE2 stages. Each pie slice displays the percentage value of PRINCE2 projects in a particular stage as part of the total PRINCE2 projects in the organization. Mouse over each pie slice to display the actual number of PRINCE2 projects in that stage.

Chapter 5: PRINCE2 Project Dashboard

This section contains the following topics:

[Access PRINCE2 Project Dashboard](#) (see page 61)

[Project Status](#) (see page 61)

[Project Report Status](#) (see page 63)

[Project by Stages](#) (see page 64)

[View PMO Dashboard](#) (see page 64)

Access PRINCE2 Project Dashboard

Use the PRINCE2 Project Dashboard to get project-specific status information including PRINCE2 fields and statuses.

The following portlets display on the PRINCE2 Project Dashboard:

- [Project Status](#). (see page 61) This portlet displays the status of the PRINCE2 project.
- [Project Report Status](#). (see page 63) This portlet displays the review status of all reports submitted for the PRINCE2 project.
- [Project by Stages](#). (see page 64) This portlet display the length of time (measured in days and percentage) for the project at various PRINCE2 stages.
- [PMO Dashboard](#) (see page 64). This portlet displays the PMO Accelerator dashboard (if PMO Accelerator is installed).

Follow these steps:

1. Open a PRINCE2 project.
The properties page appears.
2. Select PRINCE2™ Project Layout as the page layout.
See the *Project Management User Guide* for more information.
3. Click PRINCE2™ Dashboard.
The PRINCE2 project dashboard page appears.

Project Status

Use the Project Status portlet to view PRINCE2 metrics and status information for the selected PRINCE2 project.

The following information displays on the portlet:

Stage

Displays the current PRINCE2 project status. The shaded area indicates the PRINCE2 stage that the project is in. The color of the shaded area corresponds to the color of the project schedule stoplight.

Start Date

Displays the date of starting the project.

End Date

Displays the date of completing the project.

Schedule

Displays one of the following stoplights. For the stoplight to display a color, first baseline the project.

- White stoplight if there is no baseline data.
- Green stoplight if the baseline finish date is on schedule (no days late)
- Yellow stoplight if the baseline finish date is ≤ 10 days late
- Red stoplight if the baseline finish date is > 10 days late

Days Late

The actual days subtracted from the baseline days. If no baseline exists, this field is empty.

Risk

Displays one of the following risk stoplights:

- White stoplight if there is no data
- Green stoplight if all risks are low priority
- Yellow stoplight if at least one risk is medium priority and there are no high priority issues
- Red stoplight if at least one risk is high priority.

Issue

Displays one of the following risk stoplights:

- White stoplight if there is no data
- Green stoplight if all issues are low priority
- Yellow stoplight if at least one issue is medium priority and there are no high priority issues
- Red stoplight if at least one issue is high priority

Change Requests

Displays a check mark if at least one change request is logged against the project.

Project Outlook

Displays the standard stoplight indicating the project outlook. This data is derived from the latest end stage report.

- Green check mark indicates Excellent
- Yellow check mark indicates Fair
- Red X indicates Poor

Project Report Status

Use the Project Report Status portlet to receive a quick status update on the latest reports submitted. The portlet allows you to quickly see the reports pending review for a long time.

The portlet displays the following information:

Latest Reports

Displays the latest submitted report names. Click a report name to drill down to the latest report (properties page) submitted.

Report Type

Displays the submitted report type.

Approval Status

Displays the approval status of the latest submitted report type. The stoplight icon corresponds to the appropriate approval status (Submitted for Review, Reviewed, Approved, and Rejected).

of Days

Displays stoplight icon and the number of days the report had the latest status.

- Green stoplight. 1 – 5 Days
- Yellow stoplight. 6 – 10 Days
- Red stoplight. > 10 Days

Reviewer(s)

Assuming the report is still under review, the column displays the names of the pending reviewers. When review is completed, the reviewer name disappears from this column. Click an Email icon to send an email from your default email client to the current pending reviewers.

Project by Stages

Use the Project by Stages portlet to quickly see how many days the project is at each PRINCE2 stage in the PRINCE2 process model.

The portlet displays a bar chart with the X-axis representing specific PRINCE2 stages and the Y-axis representing the percentage (total duration of entire project). Each bar represents the number of days the project remained in a stage. The stages and number of days are displayed based on the latest stage. If you change the stage value to a different stage, the bar chart is reset and displays the currently selected stage. The number of days displayed for a stage is cumulative. It includes the days from the prior stage up to the current stage. If you skip a stage, the skipped stage is not displayed in the bar chart.

View PMO Dashboard

If you have the PMO Accelerator installed, you can use the [Click here to view PMO Dashboard](#) link that appears in the PMO Dashboard portlet to view the project dashboard page. This page displays the portlets for the PMO project storyboard page layout. The Page Layout field appears on the project properties page. When you click the link, the Project Dashboard opens in a separate browser window.

Note: If the PMO Accelerator is not installed, a message prompts you to contact the system administrator.

Access rights are required to the portlets on the Dashboard for the data to display.

See the *PMO Accelerator Product Guide* for more information.

Chapter 6: Access Groups

This section contains the following topics:

[Overview of Access Groups](#) (see page 65)

[Overview of Access Rights](#) (see page 66)

[PRINCE2 Project Manager Group Access Rights](#) (see page 66)

[PRINCE2 Project Support Staff Access Rights](#) (see page 74)

[PRINCE2 Executive/Senior User Access Rights](#) (see page 77)

[PRINCE2 Senior Supplier Group Access Rights](#) (see page 82)

[PRINCE2 Administrator Access Rights](#) (see page 87)

Overview of Access Groups

The PRINCE2 Accelerator includes certain access groups. The content included with this add-in is designed for these access groups. Each access group is associated with certain access rights which allow group members access to secured pages, portlets, and reports.

In addition to the required access rights, associate with the entity that is associated with the PRINCE2 project. Such association ensures full visibility and access to a project.

See the *Administration Guide* for more information.

The following describes the access groups:

- PRINCE2 Project Managers. This access group is concerned with the direction and performance of investments under their scope. This type of resource can be non-technical. Members of the PRINCE2 Project Manager group monitor, review, and approve portfolios of projects under them. They have create, view, and edit access to PRINCE2 projects, sub objects, and project dashboards. This group does not have access to executive dashboard or portlets and other PRINCE2 management control dashboards.
- PRINCE2 Project Support Staff. This access group is concerned with monitoring and working on individual tasks and action items. Each member enters time and updates tasks. This type of resource is entitled to view rights to some portlets. Also, the right to conduct peer reviews of the various PRINCE2 controls within their projects.
- PRINCE2 Senior Supplier. This access group includes team members but they play a more senior supervisory or senior resource role in the project. Members enter time and update tasks. They are members of the Project Board but can have additional supervisory or senior roles. As such, they both review and edit the various PRINCE2 controls (reports) for the projects that they are members of.

- PRINCE2 Executive/Senior User group. This access group has the right to approve or reject the various PRINCE2 controls. The group also has access to all the PRINCE2 projects, sub objects, project dashboards, and executive dashboards.
- PRINCE2 Administrator group. This access group has full access to the PRINCE2 subpage under the project properties page.

Overview of Access Rights

Each PRINCE2 access group is associated with certain access rights that allow group members access to secured pages, portlets, and reports. Also, the users require associating with the OBS that the PRINCE2 project is associated with for full visibility and access to the project.

See the *Administration Guide* for more information.

PRINCE2 Project Manager Group Access Rights

Members of this group are granted PRINCE2 specific access rights and CA Clarity PPM access rights.

PRINCE2 Access Rights

The following PRINCE2 specific access rights are included with this group:

Product Description – Create

Allows resource to create Product Description objects. This includes the page navigation right.

Type: Global

Product Description – Edit All

Allows resource to edit all Product Description objects. This includes the page navigation right.

Type: Global

Product Description – View All

Allows resource to view all Product Description objects. This includes the page navigation right.

Type: Global

Project Initiation Document – Create

Allows resource to create Project Initiation Document objects. This includes the page navigation right.

Type: Global

Project Initiation Document – Edit All

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

Type: Global

Project Initiation Document – View All

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

Type: Global

Exception Report – Create

Allows resource to create Exception Report objects. This includes the page navigation right.

Type: Global

Exception Report – Edit All

Allows resource to edit all Exception Report objects. This includes the page navigation right.

Type: Global

Exception Report – View All

Allows resource to view all Exception Report objects. This includes the page navigation right.

Type: Global

Lessons Learned – Create

Allows resource to create Lessons Learned objects. This includes the page navigation right.

Type: Global

Lessons Learned – Edit All

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

Type: Global

Lessons Learned – View All

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

Type: Global

Checkpoint Report – Create

Allows resource to create Checkpoint Report objects. This includes the page navigation right.

Type: Global

Checkpoint Report – Edit All

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

Type: Global

Checkpoint Report – View All

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

Type: Global

Highlight Report – Create

Allows resource to create Highlight Report objects. This includes the page navigation right.

Type: Global

Highlight Report – Edit All

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

Type: Global

Highlight Report – View All

Allows resource to view all Highlight Report objects. This includes the page navigation right.

Type: Global

Stage Plan – Create

Allows resource to create Stage Plan objects. This includes the page navigation right.

Type: Global

Stage Plan – Edit All

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

Type: Global

Stage Plan – View All

Allows resource to view all Stage Plan objects. This includes the page navigation right.

Type: Global

End Stage Report – Create

Allows resource to create End Stage Report objects. This includes the page navigation right.

Type: Global

End Stage Report – Edit All

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

Type: Global

End Stage Report – View All

Allows resource to view all End Stage Report objects. This includes the page navigation right.

Type: Global

Project - Subpage Checkpoint Report – Edit All

Allows resource to edit all project objects using secured subpage Checkpoint Report.

Type: Global

Project - Subpage Checkpoint Report – View All

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

Type: Global

Project - Subpage End Stage Report – Edit All

Allows resource to edit all project objects using secured subpage End Stage Report.

Type: Global

Project - Subpage End Stage Report – View All

Allows resource to navigate to all project objects using secured subpage End Stage Report.

Type: Global

Project - Subpage Exception Report – Edit All

Allows resource to edit all project objects using secured subpage Exception Report.

Type: Global

Project - Subpage Exception Report – View All

Allows resource to navigate to all project objects using secured subpage Exception Report.

Type: Global

Project - Subpage Highlight Report – Edit All

Allows resource to edit all project objects using secured subpage Highlight Report.

Type: Global

Project - Subpage Highlight Report – View All

Allows resource to navigate to all project objects using secured subpage Highlight Report.

Type: Global

Project - Subpage Lessons Learned – Edit All

Allows resource to edit all project objects using secured subpage Lessons Learned.

Type: Global

Project - Subpage Lessons Learned – View All

Allows resource to navigate to all project objects using secured subpage Lessons Learned

Type: Global

Project - Subpage PRINCE2™ – Edit All

Allows resource to edit all project objects using secured subpage PRINCE2™.

Type: Global

Project - Subpage PRINCE2™ View All

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

Type: Global

Project - Subpage Product Description - Edit All

Allows resource to edit all project objects using secured subpage Product Description.

Type: Global

Project - Subpage Product Description - View All

Allows resource to navigate to all project objects using secured subpage Product Description.

Type: Global

Project - Subpage Project Initiation Document - Edit All

Allows resource to edit all project objects using secured subpage Project Initiation Document.

Type: Global

Project - Subpage Project Initiation Document - View All

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

Type: Global

Project - Subpage Stage Plan - Edit All

Allows resource to edit all project objects using secured subpage Stage Plan.

Type: Global

Project - Subpage Stage Plan - View All

Allows resource to navigate to all project objects using secured subpage Stage Plan.

Type: Global

CA Clarity PPM Access Rights

The following CA Clarity PPM access rights are included with this access group:

Page - View

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

Type: Instance

Portlet - View

Allows users to view a specific portlet.

Type: Instance

Application - Create

Allows users to create Applications. Includes the Application - Navigate right.

Type: Global

Application - Navigate

Allows users to navigate to Application pages. Users need additional rights to view individual Applications.

Type: Global

Asset - Create

Allows users to create Assets. Includes the Asset - Navigate right.

Type: Global

Asset - Navigate

Allows users to navigate to Asset pages. Users need additional rights to view individual Assets.

Type: Global

Company - Create

Allows a resource to view and edit all companies and to create new companies. Resources with this access right cannot view documents unless specific access to the folders or documents is also granted.

Type: Global

Company - Document Manager - Administrate - All

Allows resources with access to all documents and forms attached to companies (if other access rights that provide view capability for companies, such as Company - View - All, are also granted). Resources with this access right can do the following:

- Create new form and document folders
- Add documents
- Add forms to folders
- Attach document templates to forms
- Delete forms
- Delete, copy and move documents
- View document properties, history, versions, permissions and workflows

Type: Global

Knowledge Store - Access

Allows resources to create, edit, and view knowledge store documents for which the resource has been given permission.

Type: Global

Knowledge Store - Administrate

Allows resources to administer knowledge store folders and documents for which the resource has been given permission.

Type: Global

Other Work - Create

Allows resources to create other work.

Type: Global

Other Work - Navigate

Allows resources access to the other work management pages.

Type: Global

Product - Create

Allows users to create products. Includes the Product - Navigate right.

Type: Global

Product - Navigate

Allows users to navigate to product pages. Users need additional rights to view individual products.

Type: Global

Project - Create

Allows you to create new projects and define the general properties.

Includes: Project - Create from Template right to create a project using a template.

Type: Global

Project - Edit Financial

Allows users to edit the general properties, team, key tasks, and financial information for a specific project. This access right also allows the user to add subprojects to the project, and to view and edit the project using a desktop scheduler, such as Open Workbench and Microsoft Project.

Type: Instance

Reports - Access

Allows users to access reports pages. Additional report rights are also required to view, edit, or run reports.

Type: Global

Reports - Run - All

Allows you to run any report. This right also allows users to schedule, edit properties, and view the output of any report. The access is dependent on being granted Reports - Access right.

Type: Global

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Type: Global

Resource - Create

Allows users to create a resource or role, and edit properties. Lets users create labor and nonlabor resources.

Requires: Resource - Navigate

Type: Global

Resource - Navigate

Allows you to access resource management pages.

Type: Global

Timesheets - Navigate

Lets you navigate to timesheet pages.

Type: Global

PRINCE2 Project Support Staff Access Rights

PRINCE2 Access Rights

The following PRINCE2 access rights are included with this group:

Product Description – View All

Allows resource to view all Product Description objects. This includes the page navigation right.

Type: Global

Project Initiation Document – View All

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

Type: Global

Exception Report – View All

Allows resource to view all Exception Report objects. This includes the page navigation right.

Type: Global

Lessons Learned – View All

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

Type: Global

Checkpoint Report – View All

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

Type: Global

Highlight Report – View All

Allows resource to view all Highlight Report objects. This includes the page navigation right.

Type: Global

Stage Plan – View All

Allows resource to view all Stage Plan objects. This includes the page navigation right.

Type: Global

End Stage Report – View All

Allows resource to view all End Stage Report objects. This includes the page navigation right.

Type: Global

Project - Subpage Checkpoint Report - View All

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

Type: Global

Project - Subpage End Stage Report - View All

Allows resource to navigate to all project objects using secured subpage End Stage Report.

Type: Global

Project - Subpage Exception Report - View All

Allows resource to navigate to all project objects using secured subpage Exception Report.

Type: Global

Project - Subpage Highlight Report - View All

Allows resource to navigate to all project objects using secured subpage Highlight Report.

Type: Global

Project - Subpage Lessons Learned - View All

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

Type: Global

Project - Subpage PRINCE2™ - View All

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

Type: Global

Project - Subpage Product Description - View All

Allows resource to navigate to all project objects using secured subpage Product Description.

Type: Global

Project - Subpage Project Initiation Document - View All

Allows resource to navigate to all project objects using secured subpage Project Initiation Document

Type: Global

Project - Subpage Stage Plan - View All

Allows resource to navigate to all project objects using secured subpage Stage Plan.

Type: Global

CA Clarity PPM Access Rights

The following CA Clarity PPM access rights are included with this access group.

Page - View

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

Type: Instance

Portlet - View

Allows users to view a specific portlet.

Type: Instance

Resource - View - All

Lets you view information, except the financial properties of all resources.

Type: Global

Timesheets - Navigate

Lets you navigate to timesheet pages.

Type: Global

PRINCE2 Executive/Senior User Access Rights

PRINCE2 Access Rights

The following PRINCE2 access rights are included with this group:

Product Description – Edit All

Allows resource to edit all Product Description objects. This includes the page navigation right.

Type: Global

Product Description – View All

Allows resource to view all Product Description objects. This includes the page navigation right.

Type: Global

Project Initiation Document – Edit All

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

Type: Global

Project Initiation Document – View All

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

Type: Global

Exception Report – Edit All

Allows resource to edit all Exception Report objects. This includes the page navigation right.

Type: Global

Exception Report – View All

Allows resource to view all Exception Report objects. This includes the page navigation right.

Type: Global

Lessons Learned – Edit All

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

Type: Global

Lessons Learned – View All

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

Type: Global

Checkpoint Report – Edit All

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

Type: Global

Checkpoint Report – View All

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

Type: Global

Highlight Report – Edit All

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

Type: Global

Highlight Report – View All

Allows resource to view all Highlight Report objects. This includes the page navigation right.

Type: Global

Stage Plan – Edit All

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

Type: Global

Stage Plan – View All

Allows resource to view all Stage Plan objects. This includes the page navigation right.

Type: Global

End Stage Report – Edit All

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

Type: Global

End Stage Report – View All

Allows resource to view all End Stage Report objects. This includes the page navigation right.

Type: Global

Project - Subpage Checkpoint Report - Edit All

Allows resource to edit all project objects using secured subpage Checkpoint Report.

Type: Global

Project - Subpage Checkpoint Report - View All

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

Type: Global

Project - Subpage End Stage Report - Edit All

Allows resource to edit all project objects using secured subpage End Stage Report.

Type: Global

Project - Subpage End Stage Report - View All

Allows resource to navigate to all project objects using secured subpage End Stage Report.

Type: Global

Project - Subpage Exception Report - Edit All

Allows resource to edit all project objects using secured subpage Exception Report.

Type: Global

Project - Subpage Exception Report - View All

Allows resource to navigate to all project objects using secured subpage Exception Report.

Type: Global

Project - Subpage Highlight Report - Edit All

Allows resource to edit all project objects using secured subpage Highlight Report.

Type: Global

Project - Subpage Highlight Report - View All

Allows resource to navigate to all project objects using secured subpage Highlight Report.

Type: Global

Project - Subpage Lessons Learned - Edit All

Allows resource to edit all project objects using secured subpage Lessons Learned.

Type: Global

Project - Subpage Lessons Learned - View All

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

Type: Global

Project - Subpage PRINCE2™ - Edit All

Allows resource to edit all project objects using secured subpage PRINCE2™.

Type: Global

Project - Subpage PRINCE2™ - View All

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

Type: Global

Project - Subpage Product Description - Edit All

Allows resource to edit all project objects using secured subpage Product Description.

Type: Global

Project - Subpage Product Description - View All

Allows resource to navigate to all project objects using secured subpage Product Description.

Type: Global

Project - Subpage Project Initiation Document - Edit All

Allows resource to edit all project objects using secured subpage Project Initiation Document.

Type: Global

Project - Subpage Project Initiation Document - View All

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

Type: Global

Project - Subpage Stage Plan - Edit All

Allows resource to edit all project objects using secured subpage Stage Plan.

Type: Global

Project - Subpage Stage Plan - View All

Allows resource to navigate to all project objects using secured subpage Stage Plan.

Type: Global

CA Clarity PPM Access Rights

The following CA Clarity PPM access rights are included with this access group:

Page - View

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

Type: Instance

Portlet - View

Allows users to view a specific portlet.

Type: Instance

Resource - View - All

Lets you view information, except the financial properties of all resources.

Type: Global

PRINCE2 Senior Supplier Group Access Rights

The PRINCE2 Senior Supplier Group members play a more senior supervisory or senior resource role in the project. Each member enters time and updates tasks. This type of resource has view access rights to some portlets and the right to conduct peer review of the various PRINCE2 controls.

PRINCE2 Access Rights

The following PRINCE2 access rights are included with this group:

Product Description – Edit All

Allows resource to edit all Product Description objects. This includes the page navigation right.

Type: **Global**

Product Description – View All

Allows resource to view all Product Description objects. This includes the page navigation right.

Type: **Global**

Project Initiation Document – Edit All

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

Type: **Global**

Project Initiation Document – View All

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

Type: **Global**

Exception Report – Edit All

Allows resource to edit all Exception Report objects. This includes the page navigation right.

Type: **Global**

Exception Report – View All

Allows resource to view all Exception Report objects. This includes the page navigation right.

Type: **Global**

Lessons Learned – Edit All

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

Type: **Global**

Lessons Learned – View All

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

Type: **Global**

Checkpoint Report – Edit All

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

Type: **Global**

Checkpoint Report – View All

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

Type: **Global**

Highlight Report – Edit All

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

Type: **Global**

Highlight Report – View All

Allows resource to view all Highlight Report objects. This includes the page navigation right.

Type: **Global**

Stage Plan – Edit All

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

Type: **Global**

Stage Plan – View All

Allows resource to view all Stage Plan objects. This includes the page navigation right.

Type: **Global**

End Stage Report – Edit All

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

Type: **Global**

End Stage Report – View All

Allows resource to view all End Stage Report objects. This includes the page navigation right.

Type: **Global**

Project - Subpage Checkpoint Report - View All

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

Type: **Global**

Project - Subpage End Stage Report - View All

Allows resource to navigate to all project objects using secured subpage End Stage Report.

Type: **Global**

Project - Subpage Exception Report - View All

Allows resource to navigate to all project objects using secured subpage Exception Report.

Type: **Global**

Project - Subpage Highlight Report - View All

Allows resource to navigate to all project objects using secured subpage Highlight Report.

Type: **Global**

Project - Subpage Lessons Learned - View All

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

Type: **Global**

Project - Subpage PRINCE2™ - View All

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

Type: **Global**

Project - Subpage Product Description - View All

Allows resource to navigate to all project objects using secured subpage Product Description.

Type: **Global**

Project - Subpage Project Initiation Document - View All

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

Type: Global

Project - Subpage Stage Plan - View All

Allows resource to navigate to all project objects using secured subpage Stage Plan.

Type: Global

CA Clarity PPM Access Rights

The following CA Clarity PPM access rights are included with this access groups:

Page - View

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

Type: Instance

Portlet - View

Allows users to view a specific portlet.

Type: Instance

Application - Create

Allows users to create Applications. Includes the Application - Navigate right.

Type: Global

Application - Navigate

Allows users to navigate to Application pages. Users need additional rights to view individual Applications.

Type: Global

Asset - Create

Allows users to create Assets. Includes the Asset - Navigate right.

Type: Global

Asset - Navigate

Allows users to navigate to Asset pages. Users need additional rights to view individual Assets.

Type: Global

Company - Create

Allows a resource to view and edit all companies and to create new companies. Resources with this access right cannot view documents unless specific access to the folders or documents is also granted.

Type: Global

Company - Document Manager - Administrate - All

Allows resources with access to all documents and forms attached to companies (if other access rights that provide view capability for companies, such as Company - View - All, are also granted). Resources with this access right can do the following:

- Create new form and document folders
- Add documents
- Add forms to folders
- Attach document templates to forms
- Delete forms
- Delete, copy and move documents
- View document properties, history, versions, permissions and workflows

Type: Global

Knowledge Store - Access

Allows resources to create, edit, and view knowledge store documents for which the resource has been given permission.

Type: Global

Knowledge Store - Administrate

Allows resources to administer knowledge store folders and documents for which the resource has been given permission.

Type: Global

Other Work - Create

Allows resources to create other work.

Type: Global

Other Work - Navigate

Allows resources access to the other work management pages.

Type: Global

Product - Create

Allows users to create products. Includes the Product - Navigate right.

Type: Global

Product - Navigate

Allows users to navigate to product pages. Users need additional rights to view individual products.

Type: Global

Reports - Access

Allows users to access reports pages. Additional report rights are also required to view, edit, or run reports.

Type: Global

Reports - Run - All

Allows you to run any report. This right also allows users to schedule, edit properties, and view the output of any report. The access is dependent on being granted Reports - Access right.

Type: Global

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Type: Global

Resource - Create

Allows users to create a resource or role, and edit properties. Lets users create labor and nonlabor resources.

Requires: Resource - Navigate

Type: Global

Resource - Navigate

Allows you to access resource management pages.

Type: Global

Timesheets - Navigate

Lets you navigate to timesheet pages.

Type: Global

PRINCE2 Administrator Access Rights

This special group allows the user full access to the PRINCE2 sub-page under project properties in addition to all other global rights on the PRINCE2 Project Manager.