

# CA Clarity™ PPM

## Accelerator for PRINCE2™ Product Guide - On Premise

Service Pack 02.0.01



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# CA Technologies Product References

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# Chapter 1: Release Notes: PRINCE2 Accelerator

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This section contains the following topics:

[Features and Enhancements](#) (see page 7)

[Certified and Supported Versions](#) (see page 8)

[Documentation](#) (see page 8)

[Third-Party Acknowledgements](#) (see page 8)

## Features and Enhancements

The following features are included in this version:

- A PRINCE2 project template that allows PRINCE2 project managers the option to select a PRINCE2 template and includes the various PRINCE2 stages and project sub-pages.
- A set of PRINCE2 controls (project subpages) that includes a base set of eight controls that serve as a starting point for PRINCE2 project methodology adoption. The controls are based on the PRINCE2 template and are associated with a submission, review, and approval process.
- A project level dashboard that includes a base set of eight controls based on the PRINCE2 template. A link to the PMO Dashboard allows the PRINCE2 user to quickly switch to the PMO Project Dashboard without having to change the dashboard layout.
- An executive dashboard that allows the senior executives to view at-a-glance various information regarding all PRINCE2 projects within the organization. It includes portlets for issues, project status, and PRINCE2 stage reporting.
- A set of dashboards for PRINCE2 controls that allow the senior executives to quickly access and view an aggregation of reports, risks, issues, and change requests for all PRINCE2 projects in the organization.
- A set of group access rights that allow you to easily and quickly assign access rights to various users based on PRINCE2 definitions.
- A product check box that allows the PRINCE2 project manager to create a product breakdown structure and perform product based tracking.

## Certified and Supported Versions

For information about add-in version compatibility with CA Clarity PPM, see the *Change Impact and Upgrade Guide*.

## Documentation

This guide contains product overview, installation instructions, and download instructions. It includes descriptions of the PRINCE2 template, dashboards, and portlets.

The most recent version of the guide and release notes are available from the Documentation page on CA Support. Visit this web site periodically for the latest editions of the documentation.

## Third-Party Acknowledgements

PRINCE2™ is a trademark of the Office of Government Commerce (OGC).

# Chapter 2: PRINCE2 Accelerator

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This section contains the following topics:

[Why Use the PRINCE2 Methodology?](#) (see page 9)

[PRINCE2 Accelerator Overview](#) (see page 11)

[How the Document Review and Approval Process Works](#) (see page 12)

[Install the Add-in](#) (see page 13)

## 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](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 17)
2. [Formally initiate the project](#) (see page 19)
3. [Create project stage plans](#) (see page 22)
4. [Create checkpoint report](#) (see page 25)
5. [Create a highlight report](#) (see page 27)
6. [Create an exception report](#) (see page 30)
7. [Create an end stage report](#) (see page 32)
8. [Create a lesson learned report](#) (see page 35)

**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.

## Install the Add-in

For complete instructions on how to install an add-in, see the *Installation Guide*.



# Chapter 3: Create a PRINCE2 Project

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This section contains the following topics:

[Associate a Project with a PRINCE2 Template](#) (see page 15)

[Define Prince2 Properties for a Project](#) (see page 16)

[Create Product Descriptions](#) (see page 17)

[Create Project Initiation Documents](#) (see page 19)

[Create Stage Plan](#) (see page 22)

[Create Checkpoint Report](#) (see page 25)

[Create Highlight Report](#) (see page 27)

[Create Exception Report](#) (see page 30)

[Create End Stage Report](#) (see page 32)

[Create Lessons Learned Report](#) (see page 35)

[Track a Project Task as a Product](#) (see page 37)

## 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.

For more information, see the *Project Management User Guide*.

### 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  $\geq 5$  and  $< 10$  days
- A red stoplight appears if Days in Review is  $\geq 10$  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  $\geq 5$  and  $< 10$  days
- A red stoplight appears if Days in Review is  $\geq 10$  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 Trapping
- 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 days

**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.

For more information, see the *Project Management User Guide*.

**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

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This section contains the following topics:

[Overview of Management Controls](#) (see page 41)

[View PRINCE2 Reports](#) (see page 41)

[View PRINCE2 Stage Plans](#) (see page 44)

[Review Risks, Issues, and Change Requests](#) (see page 45)

[View Lessons Learned Reports](#) (see page 48)

[Executive Dashboard](#) (see page 49)

## 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.

For more information, see the *Administration Guide*.

**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 stoplight 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.

For more information, see the *Project Management User Guide*.

**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  $\leq 10$  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  $\leq 80$  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.

For more information, see the *Basics User Guide*.

**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

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This section contains the following topics:

[Access PRINCE2 Project Dashboard](#) (see page 55)

[Project Status](#) (see page 55)

[Project Report Status](#) (see page 57)

[Project by Stages](#) (see page 58)

[View PMO Dashboard](#) (see page 58)

## 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 55) This portlet displays the status of the PRINCE2 project.
- [Project Report Status](#). (see page 57) This portlet displays the review status of all reports submitted for the PRINCE2 project.
- [Project by Stages](#). (see page 58) This portlet displays the length of time (measured in days and percentage) for the project at various PRINCE2 stages.
- [PMO Dashboard](#) (see page 58). 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.  
For more information, see the *Project Management User Guide*.
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  $\leq 10$  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.