CA Clarity™ PPM

Accelerator for PRINCE2™ Product Guide - On Premise

Service Pack 02.0.02

CA Technologies Product References

Third-Party Acknowledgements

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Chapter 1: Release Notes: PRINCE2 Accelerator

This section contains the following topics:

PRINCE2 Accelerator Features and Enhancements (see page 7)
PRINCE2 Accelerator Certified and Supported Versions (see page 7)
PRINCE2 Accelerator Documentation (see page 8)
PRINCE2 Acclerator Third-Party Acknowledgements (see page 8)

PRINCE2 Accelerator 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 subpages.
- A 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 that are based on the PRINCE2 template. A link to the PMO Dashboard allows the PRINCE2 user to switch to the PMO Project Dashboard without having to change the dashboard layout.
- An executive dashboard that provides views of PRINCE2 projects including portlets for issues, project status, and PRINCE2 stage reporting.
- A set of dashboards for PRINCE2 controls that provide executive level access and views. These dashboards include aggregated 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.

PRINCE2 Accelerator Certified and Supported Versions

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

PRINCE2 Accelerator 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.

PRINCE2 Acclerator Third-Party Acknowledgements

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

Chapter 2: The PRINCE2 Accelerator

This section contains the following topics:

Overview: PRINCE2 Accelerator (see page 9)
The PRINCE2 Methodology (see page 10)

Overview: PRINCE2 Accelerator

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).

For add-in installation instructions, search *Installation*.

For more information about the PRINCE2 methodology, visit http://www.ogc.gov.uk/methods_prince_2.asp. To download additional PRINCE2 document templates, 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.

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 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. The PRINCE2 methodology helps you achieve these goals:

- 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.

How the PRINCE2 Document Review and Approval Process Works

A series of reports acts as a control mechanism throughout the project lifecycle. As each report is completed, the Project Board review and approval process reviews the various reports.

When you create reports involved in the management of a typical PRINCE2 project, you perform these tasks:

1. Describe the product to deliver (see page 16)
2. Formally initiate the project (see page 18)
3. Create project stage plans (see page 20)
4. Create checkpoint report (see page 22)
5. Create a highlight report (see page 23)
6. Create an exception report (see page 23)
7. Create an end stage report (see page 24)
8. Create a lesson learned report (see page 24)

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 3: Create a PRINCE2 Project

This section contains the following topics:

Associate a Project with a PRINCE2 Template (see page 15)
Define Prince2 Properties for a Project (see page 15)
Create Product Descriptions (see page 16)
Create Project Initiation Documents (see page 18)
Create Stage Plan (see page 20)
Create Checkpoint Report (see page 22)
Create Highlight Report (see page 23)
Create Exception Report (see page 23)
Create End Stage Report (see page 24)
Create Lessons Learned Report (see page 24)
Track a Project Task as a Product (see page 25)

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.

Follow these steps:

1. Open the Portfolio Management menu, and click Projects.
2. Click New from Template.
3. Click the Prince2 Project Template and click Next.
4. Complete the required fields on the page, and save the 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.
2. Open the Properties menu, and click PRINCE2™.

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.
2. Open the Properties menu and click Product Description.
3. Click New.
4. Complete the requested information. The following fields require explanation:

   Approval Status

   Displays the current approval status of this report. This field displays only after saving changes. The following indicators indicate status:

   - New (gray indicator). The default selection when the report is not yet submitted for review.
   - Submit For Review (yellow indicator). Displays once the report is submitted for review.
   - Approved (green indicator). Displays if the report is approved during the review process.
   - Rejected (red indicator). 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.
6. Complete the requested information. The following fields require explanation:

   Days in Review

   Displays the number of days passed from the day the report is submitted for review with the applicable colored 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 indicator appears:

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

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.
2. Open the Properties menu, and click Project Initiation Document.
3. Click New.

4. Complete the requested information. The following fields require explanation:

   Approval Status

   Displays the current approval status of this report. This field displays only after saving changes. The following indicators indicate status:

   - New (gray indicator). The default selection when the report is not yet submitted for review.
   - Submit For Review (yellow indicator). Displays once the report is submitted for review.
   - Approved (green indicator). Displays if the report is approved during the review process.
   - Rejected (red indicator). 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 displays information, of which the following requires explanation:.

   Days in Review

   Displays the number of days passed from the day the report is submitted for review with the applicable colored 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 indicator appears:

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

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.
2. Open the Properties menu, and click Stage Plan.
3. Select New.

4. Complete the requested information. The following fields require explanation:

   Approval Status

   Displays the current approval status of this report. This field displays only after saving changes. The following indicators indicate status:

   - New (gray indicator). The default selection when the report is not yet submitted for review.
   - Submit For Review (yellow indicator). Displays once the report is submitted for review.
   - Approved (green indicator). Displays if the report is approved during the review process.
   - Rejected (red indicator). 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 displays information, of which the following requires explanation:.

   Days in Review

   Displays the number of days passed from the day the report is submitted for review with the applicable colored 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 indicator appears:

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

   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.
2. Open the Properties menu, and click Checkpoint Report.
3. Click New.
4. Supply the requested information and 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.

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.
2. Open the Properties menu and click Highlight Report.
3. Click New.
4. Provide the requested information and save the changes.

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.
2. Open the Properties menu, and click Exception Report.
3. Click New.
4. Provide the requested information and save the changes.
5. Save the changes.

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.
2. Open the Properties menu, and click End Stage Report.
3. Select New.
4. Provide the requested information and save the changes.

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.
2. From the Properties menu, and click Lessons Learned.
3. Click New.
4. Enter the requested information and save changes.

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.

Follow these steps:

1. Open your PRINCE2 project.
2. Click Tasks.
3. Click New.
4. Enter the required information, and save.
5. Select the Product check box to flag the task as a product, and save.

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.
2. Click Tasks.
3. Click the Expand Filter link.
4. In the Task Filter portlet, click the Build Power Filter link next to Power Filter.
5. From the Object drop-down, click Task.
6. From the Field drop-down, click Product.
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.

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

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.

This section contains the following topics:

Overview of Management Controls (see page 27)
View PRINCE2 Reports (see page 28)
View PRINCE2 Stage Plans (see page 30)
Review PRINCE2 Risks, Issues, and Change Requests (see page 30)
View PRINCE2 Lessons Learned Reports (see page 32)
PRINCE2 Executive Dashboard (see page 32)

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.

3. Complete the requested information. The following fields require explanation:

   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.

Review PRINCE2 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

Displays an aggregate of the risks logged for all PRINCE2 projects in the organization.

Issues Log

Displays an aggregate of the issues logged for all PRINCE2 projects in the organization.

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.

To view the list of risks:

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

The page displays the following fields:

Above Threshold

Displays the above threshold status indicator 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.

Probability

Displays the Probability indicator based on the probability field of the risk.

Impact

Displays the Impact indicator 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.
2. Click the Issues Log page.

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
2. Select the Change Requests Log page.

View PRINCE2 Lessons Learned Reports

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

To view the reports:

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

  The page displays Lessons Learned information, of which the following fields require explanation:

  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.

PRINCE2 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:

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

  The page displays information, of which the following fields require explanation:

  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 colored indicators 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 colored indicator to drill to the Risks/Issues/Changes tab for the project.

Open Risks %

Displays one of the following colored indicators 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 colored indicator to drill to the Risks/Issues/Changes page for the project.

Resolved Issues %

Displays one of the following colored indicators and percentage values:

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

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

Resolved Risks %

Displays one of the following colored indicators and percentage values:

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

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

Plan Outlook

Displays the standard colored indicator 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 colored indicator 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.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Executive Dashboard.
2. Click the Project Status portlet.

   The page displays information, of which the following fields require explanation:

   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) indicator.

   Schedule (Status)

   Displays one of the following colored indicators:

   - White = no baseline data.
   - Green = the baseline finish date is on schedule (no days late)
   - Yellow = the baseline finish date is <= 10 days late
   - Red = the baseline finish date is > 10 days late

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

   Products Completed %

   Displays one of the following colored indicators based on the percent of products completed:

   - Green = actual products completed is > 80 percent of total products (actual + remaining products).

- Yellow = actual products completed is > 40 percent but < = 80 percent of total products (actual + remaining products).
- Red = actual products completed is < 40 percent of total products (actual + remaining products).

Click a colored indicator 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.

Follow these steps:

1. Open the PRINCE2™ Management Controls menu, and click Executive Dashboard.
2. Click the Project by Stages portlet.

The projects 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

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 38) This portlet displays the status of the PRINCE2 project.
- Project Report Status. (see page 39) This portlet displays the review status of all reports submitted for the PRINCE2 project.
- Project by Stages. (see page 40) This portlet display the length of time (measured in days and percentage) for the project at various PRINCE2 stages.
- PMO Dashboard (see page 40). This portlet displays the PMO Accelerator dashboard (if PMO Accelerator is installed).

Follow these steps:

1. Open a PRINCE2 project.
2. Select PRINCE2™ Project Layout as the page layout.
3. Click PRINCE2™ Dashboard.

This section contains the following topics:

Access PRINCE2 Project Dashboard (see page 37)
Project Status (see page 38)
Project Report Status (see page 39)
Project by Stages (see page 40)
View PMO Dashboard (see page 40)

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 38) This portlet displays the status of the PRINCE2 project.
- Project Report Status. (see page 39) This portlet displays the review status of all reports submitted for the PRINCE2 project.

- Project by Stages. (see page 40) This portlet display the length of time (measured in days and percentage) for the project at various PRINCE2 stages.
- PMO Dashboard (see page 40). This portlet displays the PMO Accelerator dashboard (if PMO Accelerator is installed).

Follow these steps:

1. Open a PRINCE2 project.
2. Select PRINCE2™ Project Layout as the page layout.
3. Click PRINCE2™ Dashboard.

Project Status

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

The page displays information, of which the following fields require explanation:

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 status indicator.

Schedule

Displays one of the following colored indicators. For the indicator to display a color, first baseline the project.

- White indicator if there is no baseline data.
- Green indicator if the baseline finish date is on schedule (no days late)
- Yellow indicator if the baseline finish date is <= 10 days late
- Red indicator 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 indicators:

- White indicator if there is no data

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

Issue

Displays one of the following risk indicators:

- White indicator if there is no data
- Green indicator if all issues are low priority
- Yellow indicator if at least one issue is medium priority and there are no high priority issues
- Red indicator 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 colored indicator 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 page displays information, of which the following fields require explanation:

Latest Reports

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

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 colored indicator and the number of days the report had the latest status.

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

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