The PRINCE2® Add-on for P2ware Project Manager

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The PRINCE2® Add-on for P2ware Project Manager

The PRINCE2[®] Add-on for P2ware Project Manager is a set of tools to help application of the PRINCE2 method to managing projects with the P2ware Project Manager 7 software. It contains:

- PRINCE2 Guide
- Quick access PRINCE2 Glossary
- PRINCE2 Process Plans templates
- PRINCE2 Project Plan templates
- PRINCE2 Management Product templates published by AXELOS Limited
- PRINCE2 Role Description templates developed by P2ware Limited,

Who and how should use the PRINCE2® Add-on?

The PRINCE2[®] Add-on can be used by PRINCE2 novices as well as by project management experts, however a way of using it is dependent on the user's experience and knowledge of the PRINCE2 method.

The **PRINCE2 Guide** with **Quick access Glossary** should be used to give the user easy access to important parts of the PRINCE2 Manual to remind or to learn the most important elements of the PRINCE2 method.

PRINCE2 Process Plans cover activities within the PRINCE2 processes with check lists of actions recommended by the method. They should be imported to a selected PRINCE2 Project Plan template, as required, and used to plan and control managerial activities and actions of the user while managing PRINCE2 projects.

They can also be used by those with the Project Assurance role for checking if the project is managed according to PRINCE2.

The **PRINCE2 Project Plan** template should be used by the project manager to plan and manage PRINCE2 projects using the P2ware Project Manager software.

PRINCE2 Management Product templates published by AXELOS Limited and **PRINCE2 Role Description templates** developed by P2ware Limited, can be tailored to the project environment and saved as a part of the project documentation.

How it is distributed?

The PRINCE2[®] Add-on for P2ware Project Manager (shortly 'PRINCE2[®] Add-on') is distributed as a plugin for P2ware Project Manager software as a file named: **PRINCE2[®] Add-on for P2ware Project Manager.p2plugin**

How to install the plugin?

Before installing the plugin, the P2ware Project Manager 7 (shortly PM7) software should be installed in the computer.

To install the plugin, click on the plugin file name or open the P2ware Project Manager and use the Plugin Manager.

To get access to the Plugin Manager click the button in the top left corner. It should be visible in the window on the left side of the P2ware Project Manager 'start screen' as shown in Figure 1.

To activate the plugin, click on its name.

The PRINCE2 Guide as other elements of the plugin have a form of the PM7 plan templates, however it should be used as 'only to read'.

It is sufficient to place the cursor on an icon to read on the relevant element.

To activate required element, click on its icon.

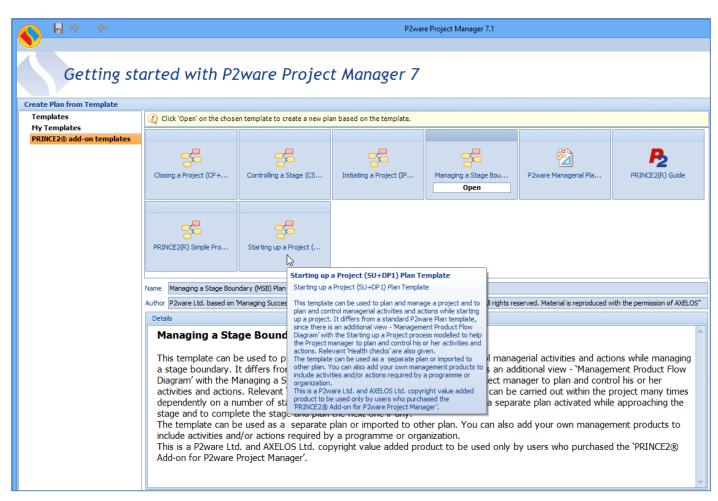


Figure 1 Activation of the 'PRINCE2® Add-on'.

PRINCE2 Guide

The purpose of the PRINCE2 Guide is to ensure the user an easy access to the most important parts of the PRINCE2 Manual when required, just by one or two clicks.

The Guide has a form of a diagram showing elements of the PRINCE2 methods (Figure 2).

The upper part of the diagram shows groups of elements of the PRINCE2 method:

- Principles
- Themes
- Processes
- Management product outlines
- Role descriptions
- Health checks

The lower part shows a flow of management products and results of management activities within the PRINCE2 management processes and relevant responsibilities).

It is sufficient to select a *Perspective* with the name of a group and locate the cursor on an element of interest to see its relevant information in the *Tooltip* window (Figures 3 to 10). For some elements more information in a structured form is also available in the *Properties* window.

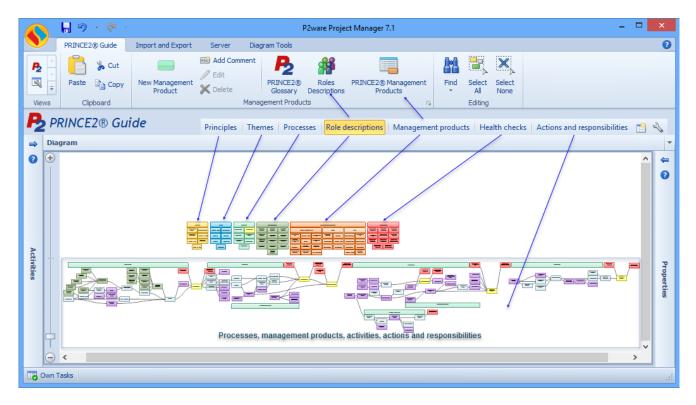


Figure 2 PRINCE2® Guide view - All PRINCE2 elements together with very quick and easy access.

Principles Themes Processes Role de										
PRINCIPLES THEMES										
		Continued business justification	Learn from expe	ience	Business (Case theme	Organ	ization then	ne	
Theme Purpose:	Name: Organization theme Theme Purpose: The purpose of the Organization theme is to define and establish the project's structure of accountability and responsibilities (the who?).									
Theme Relevant Res Corporate or program • Appoint the Executi • Provide information Executive	Appoint the Project Manager (if not done by corporate or programme management).									
 Confirm the appointments to the project management team and the structure of the project management team. Approve the Communication Management Strategy. Senior User(s) Provide user resources. Define and verify user requirements and expectations. 										
Senior Supplier(s) • Provide supplier resources. Project Manager • Prepare the Communication Management Strategy. • Review and update the Communication Management Strategy.										
Design, review and update the project management team structure. Prepare role descriptions. Team Manager Manage project team members.										
Project Assurance • Advise on selection • Advise on stakehold	 Advise on project team members and stakeholder engagement. Project Assurance Advise on selection of project team members. Advise on stakeholder engagement. Ensure that the Communication Management Strategy is appropriate and that planned communication activities actually take place. 									
Project Support	ive support for the proj								1	
	Health check			Authorize initi Health che			Risk Re	gister		

Figure 3 Information on the Organization theme.

Diagra	m										
÷											
	PRIM	ICIPLES	тн	EMES	PROC	ESSES		ROLE DESCRIPTIONS			MAN
	Continued business justification	Learn from experience	Business Case theme	Organization theme	Starting up a Project	Directing a Project	Project Board role description	Executive role description	Senior User role description	Baseline management products	
	Defined roles and responsibilities	Manage by exception	Quality theme	Plans theme	Process purp		he Starting up a Project	process is to ensure t	hat the prerequisites for Initiati	ng a Project are in place by answering the question:	gy
	Manage by stages	Tailor to suit the project environment	Risk theme	Change theme	The purpose of the Starting up a Project process is as much about preventing poorly conceived projects from ever being initiated as it is about approving the initiation of viable projects. As such, Starting up a Project is a lighter process compared to the more detailed and thorough Initiating a Project process. The aim is to do the						
	Focus or	products	Progre	ess theme	Process object There is a b	sary in order to decid tive: The objective o usiness justification fo	e whether it is worthwhil f the Starting up a Projec r initiating the project (d	le to even initiate the ct process is to ensure locumented in an outli	project. e that:		
1					 Sufficient in The various Individuals a The work research of the second seco	formation is available ways the project can appointed who will quired for project initi	be delivered are evaluate undertake the work requ ation is planned (docume	e scope of the project ed and a project appr uired in project initiati ented in a Stage Plan)	ion and/or will take significant p)	roject management roles in the project s, acceptance criteria and constraints.	6
					trigger for the management o for proposal' in at least the pro The Project Bo	project the project ma rganization. The term a supplier environmen spective Executive of t ard must be provided	ndate, which is provided project mandate applies nt. The project mandate he Project Board. The m with sufficient information	by the responsible au to whatever informat should provide the ter andate is refined to d n to make the decision	thority which is commissioning tion is used to trigger the project rms of reference for the project evelop the Project Brief. n to initiate the project. The Pro	available at the time of start-up. PRINCE2 calls the the project - typically the corporate or programme t, be it a feasibility study or the receipt of a 'request and should contain sufficient information to identify uject Brief is prepared for this purpose.	oject - project ack
g up aith	a Project heck	Autho	ng a Project - fize initiation ath check	Risk Register	Project Brief ar Manager shoul The preparatio and consultatio during the Star	d will appoint some, il d validate what is prov n of the outline Busine ns between the Project ting up a Project proce	not all, members of the ided by the programme a ss Case and the assembl t Manager, the Project B ass, the more time will be	Project Board, thus e and, if necessary, reo ling of the Project Brie loard members and of e saved during project	liminating much of the work re- ommend modifications. of (which are parallel and iterati ther stakeholders. The more tin	urged in this programme uses should provide the quired in this process. In such cases, the Project we activities require regular and frequent interaction ne spent on getting the requirements clearly captured coeptions and replanning. The contents of the Project	ig a Staj ry Healt eck
L			Strategy ality Management	Communication Management Strategy	Project the Project Man Appoint the Capture pre	ager. The activities a Executive and the Pro	re to: ject Manager	oject process are like	ly to be shared between corpor	ate or programme management, the Executive and	
						outline Business Case					

Figure 4 Information on the Starting up a Project process.

More information on some of the elements can be seen in the *Properties* window, as shown in Figure 5.

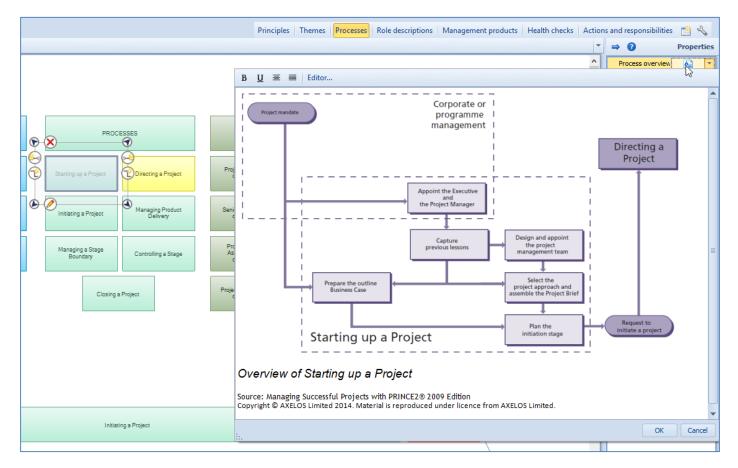


Figure 5 Overview of the Starting up a Project process.

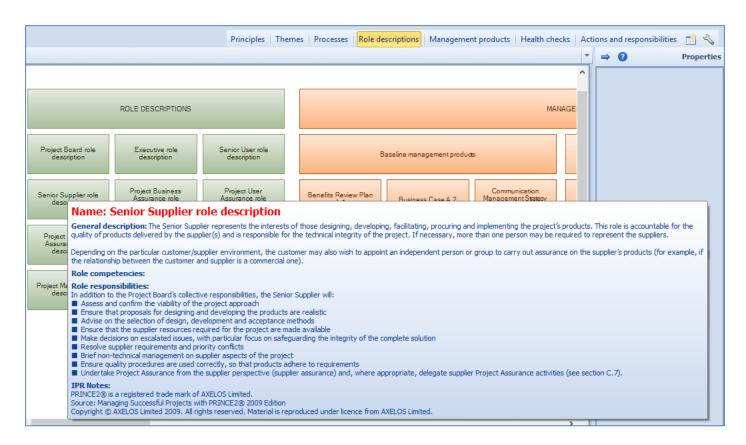


Figure 6 A role description.

B I Editor ROLE DESCR Senior Supplier(s) Project Board role description Executive description Executive description Project Business Case Responsible for the supplier Business Case(s) (if they exist) – see section 19.6.1.1. Senior Supplier role description Project Business Case Responsible for the supplier resources Quality Approve the Project Product Description (if appropriate). Approve the Quality Management Strategy. Project Supplier Assurance role description Project Assurance role description Project Assurance role description Project Assurance role description Finsure that Project Plans and Stage Plans remain consistent from the supplier perspective. Project Manager role Team Manage Risk Ensure that risks relating to the supplier aspects are identified, assessed and controlled (such as the creation of the project for dust product)			▼ ● ? Propertie ^ Themes relevant responsib ▲ *
Business Case Responsible for the supplier Business Case(s) (if they exist) – see section 19.6.1.1. Project Board role description Exacutive description Organization Provide supplier resources Organization Provide supplier resources Quality Approve the Project Product Description (if appropriate). Approve the Quality Management Strategy. Project Supplier role description Project Assurance role description Project Assurance role description Project Assurance role description Ensure that Project Plans and Stage Plans remain consistent from the supplier perspective. Project Supplier Project Assurance role description Ensure that Project Plans and Stage Plans. Risk Ensure that risks relating to the supplier aspects are identified, assessed and controlled			Editor
Project Board role description Executive description Project Board role description Executive description Project Supplier role description Project Bus Assurance role description Project Supplier role description Project Assura description Project Supplier role description Project Assura description Project Supplier role description Project Assura description Project Supplier Assurance role description Project Assura description Project Assuration Ensure that Project Plans and Stage Plans remain consistent from the supplier perspective. Commit supplier resources to Stage Plans. Risk	ROLE DES	RI	Senior Supplier(s)
Senior Supplier role description Project Bus Assurance description • Approve the Project Product Description (if appropriate). • Approve the Quality Management Strategy. • Approve the Quality Management Strategy. • Project Supplier Assurance role description • Project Assura description • Project Assura description • Project Assura description • Project Assura description • Risk • Ensure that Project Plans and Stage Plans. • Ensure that risks relating to the supplier aspects are identified, assessed and controlled		ve	Confirm that the products required can be delivered within the expected costs and are
 Senior Supplier role description Project Bus Assurance description Approve the Quality Management Strategy. Approve the quality methods, techniques and tools adopted in product development. Project Supplier Assurance role description Project Assura description Project Assura description Project Assura description Ensure that Project Plans and Stage Plans remain consistent from the supplier perspective. Commit supplier resources to Stage Plans. Risk Ensure that risks relating to the supplier aspects are identified, assessed and controlled 	© 🗶 🦾 🕤	Organization	Provide supplier resources
Assurance role description Project Assurate description Plans • Ensure that Project Plans and Stage Plans remain consistent from the supplier perspective. • Commit supplier resources to Stage Plans. • Ensure that risks relating to the supplier aspects are identified, assessed and controlled	Senior Supplier role description	usi ce ptix	 Approve the Quality Management Strategy. Approve the quality methods, techniques and tools adopted in product development. Provide resources to undertake supplier quality activities.
	Assurance role Project Ass		perspective.
description description description		ag	 Ensure that risks relating to the supplier aspects are identified, assessed and controlled (such as the creation of the project's products).
Change • Respond to requests for advice from the Project Manager.		Change	Make decisions on escalated issues, with particular focus on safeguarding the integrity of
Program managem Progress • Ensure that progress towards the outcome remains consistent from the supplier perspective.	progra	mr Progress	

Figure 7 A role's themes relevant responsibilities

To see the role's theme relevant responsibilities, select the role and click the icon in the *Properties*, as shown in Figure 7.

	Princip	les Themes Processes	Role descriptions Manag	gement products Health c	hecks Actions and respor	nsibilities 📑 🔦
Benefits Review Plan A.1	Business Case A.2	Communication Management Strategy A.4	Configuration Item Records A.5	Daily Log A.7	Checkpoint Report A.3	End Prc
Configuration Management Strategy A.6	Plan A.16	Product Description A.17	Issue Register A.12	Lessons Log A.14	End Stage Report A.9	Exception
Project Brief A. 19	Project Initiation Documentation A.20	Project Product Description A.21	Quality Register A.23	Risk Register A.25	Highlight Report A.11	Issue F
Background Project tobjective Desired outcome Project scope an Constraints and: Project collerance The user(s) and: Interfaces Outline Business C Project product De Project product De Project approach environment into whit Project mandate Project mandate Programme manage Discussions with t# Discussing with t# Discussions with t# Discussing with t# Dis	es (covering time, cost, quality s d exclusions assumptions es any other known interested p asse (see section A.2) - Reaso escription (see section A.21) - To define the ectoice of solution the solution must fit ent team structure - A chart sf For the project management ny associated documents or e supplied at the start of the p gement – if the project is part orporate management regard of the project Board and users if f he operations and maintenance e (potential) suppliers regardir intation: ke a number of formats, inclue entation slides	ns why the project is needed. Including the customer's quali on that will be used within the nowing who will be involved will team and any other key resour roducts. roject of a programme, the Project B ng corporate strategy and an the project mandate is incompl e organization (if applicable) ng specialist development lifect	rmance goals) and the business option selected ty expectations, user acceptance project to deliver the business of th the project rrces identified at this time rief is likely to be supplied by the policies and standards that app ete or if no project mandate is p	e criteria, and operations and r option selected from the Busin e programme, and therefore it oly	maintenance acceptance criteri ess Case, taking into considera	a tion the operational

Figure 8 An example of a management product outline

In figure 8 is shown a management product outline for the Project Brief, which can be seen in the *Tooltips* window just by placing the cursor on the product of interest.

By selecting a product and clicking the icon visible in the *Properties* window a relevant product's template published by AXELOS Limited can be seen, as shown in the figure 9. The management product templates are also available for editing, as well as role description templates.

	Prin	ciples Themes	Processes Role	e descriptions	lanagement pro	ducts Health	checks Acti	ions and respo	nsibilities	<u> </u>
						•	⇒ 🕐		Р	roperties
		·				<u>^</u>	AXELOS Ter	mplate		
	Benefits Review Plan		B <u>U</u> ≣≣	Editor						3
	A.1	Business Ca		DDI			:			A
				PRI	NCE2	°- Pro	Ject B	rier		
	Configuration									
	Configuration Management Strategy A.6	Plan A.1								≡
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	Quality Management Strategy A.22	Risk Manage Strategy A	Client:							-
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Figure 9 A management product template published by AXELOS Limited.

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The Health checks presented in the PRINCE2 Manual in Appendix E can be seen in the Health checks group as well as in the lower part of the PRINCE2[®] Guide diagram (Figure 10).

	Principles Themes Processes Role descriptions Management products Hea	Ith checks Actions and responsibilities 🛗 🔧
Controlling a Stage Health check Name: Directing a Project - Give ad hoc direction Health check	Managing a Stage Boundary Health check	Directing a Authorize t Exception F
Ad hoc direction given Excep Stage Plan for next stage Stage Plan for next Stage P	nonded to reports? Specifically, has it: light Report in order to understand the status of the project and satisfied itself, through a ding to plan? tion Reports – adjusted tolerances or approved responses to the exception as appropriate Reports within the board's delegated limits of authority or sought advice from corporate o onded to external influences? Specifically, has it: is kept informed of external events that may affect it? remains focused on the corporate or programme objectives set, and remains justified in th Manager is notified of any changes in the corporate or programme environment that may ormed corporate or programme management (and other interested parties) of the project	dialogue with the Project Manager, that the pr programme management? pusiness terms? impact on the project and that appropriate

Figure 10 An example of the health check.

All process activity descriptions in the PRINCE2 Manual contain a list of actions recommended by PRINCE2 and roles responsible for the actions. Within the Starting up a Project process description there are more than 120 actions listed at a few places. It is difficult even for an experienced Project manager to remember the all.

While using the PRINCE2[®] Guide, actions and responsibilities relevant to an activity can be seen immediately just by placing the cursor on the activity visible in the lower part of the guide diagram (Figure 11).

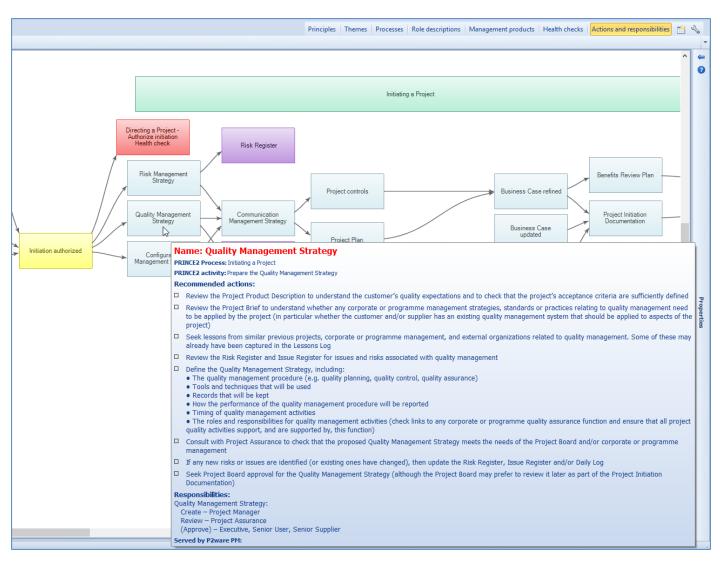


Figure 11 Actions recommended by PRINCE2 and role responsibilities.

With just one click the user can open the Quick access Glossary of the PRINCE2 terms (Figure 12).

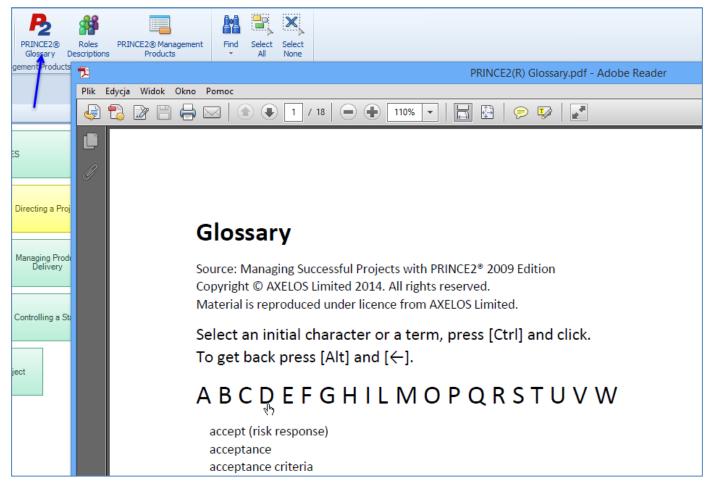


Figure 12 The Quick access Glossary.

The PRINCE2[®] Add-on for P2ware Project Manager contains also role description templates, developed by P2ware based on the PRINCE2 Manual, and management product templates published by AXELOS Limited. They and the Quick access Glossary are available in the PRINCE2[®] Guide as well as in all plan templates.

There are no templates for logs and registers since they should be maintained by P2ware Project Manager 7.

-2		
RINCE2® Glossary	Roles PRINCE2® Management Find Select Select Descriptions Products All None	
nent Product	s 5 Editing	
	*	
	Role description templates	
Widok		
t Manager	▹ Plugins	
	Nazwa	
	Role description Change Authority	
	Role description Configuration Librarian	
	Role description Corporate or Programme Management	
	Role description Executive	
	Role description Project Board	
	Role description Project Business Assurance	
	Role description Project Manager	
	Role description Project Supplier Assurance	
	Role description Project Support Office	
	Role description Project Support	
	Role description Project User Assurance	
	Role description Senior Supplier	
	Role description Senior User	
	Role description Team Manager	

Figure 13 A list of role description templates available.

PRINCE2® Roles PRINCE2® Management Find Select Select Glossary Descriptions Products All None	
gement Products 🛛 🕞 Editing	
PRINCE2 Management products (AXELOS templates)	
E2ProjectManager7plugin Resources PRINCE2 Management products (AXELOS templates)	0
Nazwa	
🖬 Benefits Review Plan	
Business Case	
Checkpoint Report	
Communication Management Strategy	
Configuration Item Record	
Configuration Management Strategy	
🖬 Daily Log	
End Project Report	
🖬 End Stage Report	
Exception Report	
Highlight Report	
🖬 Issue Report	
🖬 Lessons Report	
🖬 Plan	
Product Description	
Product Status Account	
Project Brief	
Project Initiation Documentation	
Project Product Description	
Quality Management Strategy	
Risk Management Strategy	
Work Package	

Figure 14 A list of management product templates available.

How to use PRINCE2 Process Plans and PRINCE2 Project Plan templates?

P2ware Project Manager 7 is a computer tool supporting nearly all project management aspects, starting with planning up to the project end report.

While managing a project the Project managers is responsible for specialist products to be delivered and for managerial products and relevant activities.

It is possible to add most important management products to the project plan, but mixing specialist and management product in one plan may decrease concentration on some of them.

With the PRINCE2[®] Add-on for P2ware Project Manager an additional view is added to the plan, called the Management Product Flow Diagram. In this diagram all management products can be shown in a sequence they have to be created or presented to the Project board or to other stakeholders.

If justified also other management products can be added e.g. internal documents not considered by PRINCE2.

By using very unique feature of the PM7 software to each product a check list with PRINCE2 recommended actions can be attached. The user can also define and attach his or her own list of actions e.g. actions required by internal regulations.

Just by placing the cursor on an element of the diagram relevant list is shown (Figure 15).

When one or more actions is completed, the user can select the product and mark on the action checklist the actions completed (Figure 16).

To see completed and uncompleted actions it is sufficient to place the cursor on a product of interest, as shown in Figure 17.

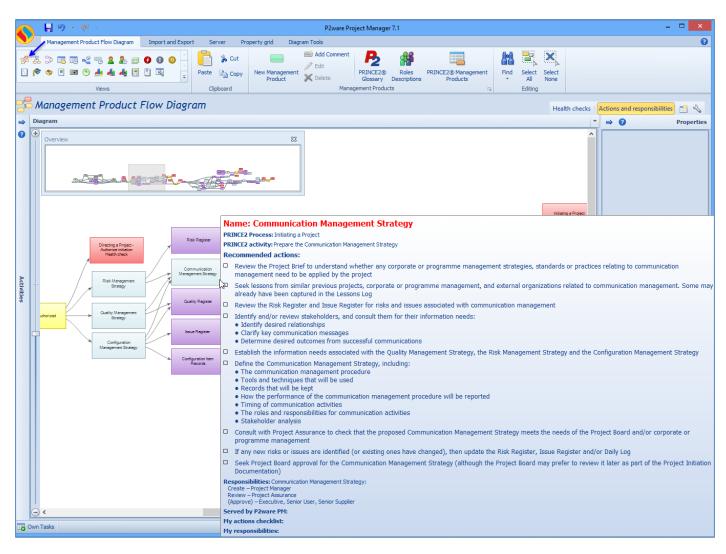


Figure 15 An example of the action checklist.

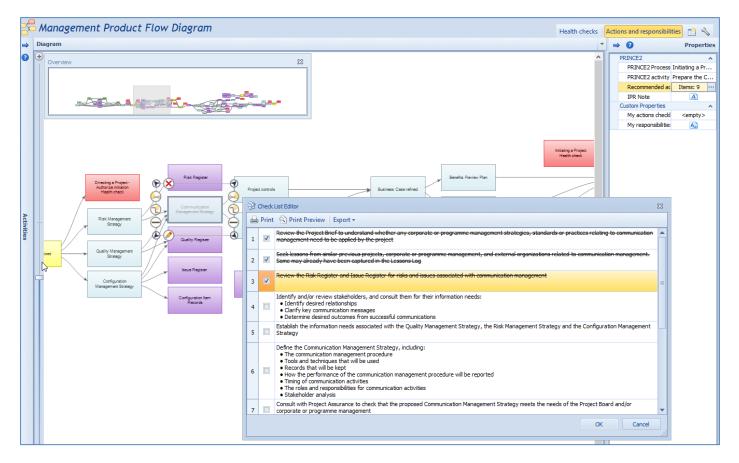


Figure 16 Marking completed actions.

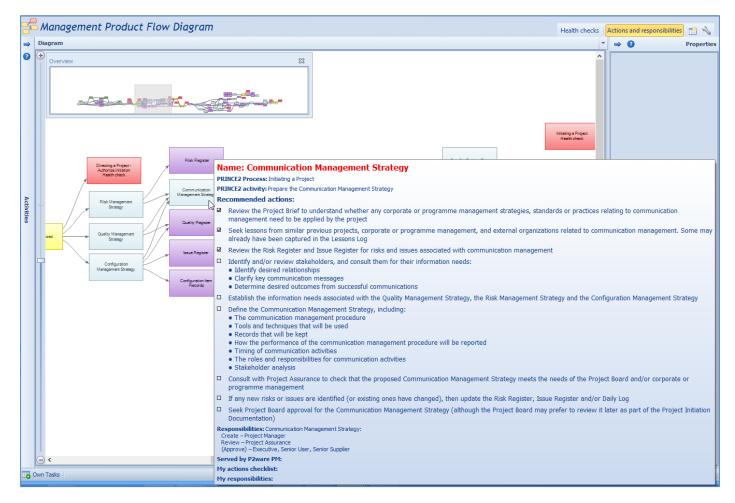


Figure 17 Controlling completed actions.

The following plan templates are included in the PRINCE2[®] Add-on for P2ware Project Manager:

- Starting up a Project (SU+DP1) Plan Template
- Initiating a Project (IP+DP2+DP3) Plan Template
- Managing a Stage Boundary (MSB) Plan Template
- Closing a Project (CP+DP5) Plan Template
- Controlling a Stage (CS+MPD+MSB+DP4) Plan Template
- PRINCE2(R) Simple Project Plan Template
- P2ware Managerial Plan Template

There are many ways of using the PRINCE2 Process Plan templates:

- They can be imported to a new plan one by one as the project progresses.
- They can be used as separate plans just for controlling managerial actions of the user.
- New plan templates can be created by tailoring the PRINCE2 products, recommended actions and health checks.