

Principal Toolbox 3.7.5

This report covers the Silver Stage assessment of Principal Toolbox version 3.7.5, an application from Fortes Solutions BV, that I conducted between the 3rd and 26th May 2006.

Principal Toolbox is an application that has been developed to help project managers apply the PRINCE2 methodology in a uniform and disciplined way. It is available as a hosted service or as an intranet application. In addition to the main application, there is a series of optional add-ons available, each of which extends the system functionality in a particular direction. The available add-ons are:

Hours Registration - for the weekly collection of timesheet information.

Costs Registration - for the weekly collection of costs.

Advanced Customisation and Workflow - to define standard workflow and approval cycles and add customised fields to views and reports.

Microsoft Project Integration - facilitates synchronisation between Microsoft Project and Principal Toolbox.

Integration Dashboard - provides the interface between Principal Toolbox and financial systems such as SAP and Peoplesoft as well as external timesheet systems.

Resource Capacity Planning - for controlling staff allocation over all projects and operational tasks.

Benefits Management - to relate projects to business goals and monitor their contribution.

Managing Successful Programmes - adds programme management functionality to the system.

PRINCE2 FAQs - general PRINCE2 help.

Project Plaza - a Web page for the publication of project information and news.

This assessment was carried out using a system with all of the add-ons installed and covers the complete system, including all of the add-ons.

Principal Toolbox uses a role-based security system and users are therefore required to log on with a username and password. They are then directed to their personal dashboard, their home page. This lists their programs and projects with RAG traffic lights indicating progress. On the left-hand side of the screen is a list of the PRINCE2 and project products that they own and a list of products awaiting review by them. On the right-hand side are lists of activities, issues, risks, quality reviews, changes and timesheets awaiting completion. In any list the user can click on an entry to go straight to its page.

The application is organised around a configurable tree system and the user is able to determine the number of levels in each branch of the tree and what those levels are. At the highest level, the entire enterprise portfolio is displayed, listing all of the programmes therein. A click on the name of a programme expands the display to show the projects within that programme. At this level, it's possible to edit a programme's details and groups of programmes and projects with varying numbers of levels can be nested within branches. The lists can be customised and filtered and custom fields can be inserted into projects, which can also be used as a basis for sorting and filtering.

Each programme and each project has its own dashboard, a centralised area containing summarised information and from where detailed information may be accessed.

To assist in the creation of new projects, a set of pre-defined project templates is provided. An organisation can promote its own best practices by creating a corporate project template in which they are embedded. Templates are provided for each PRINCE2 product and these can be edited and new templates added. It is also possible to use automated templates, which take information held elsewhere in the system and use it to complete as much of the PRINCE2 product as possible, before it is exported to Microsoft Word for manual editing and completion. Highlight Reports can, for example, be prepared in this way.

Within a system of product breakdown and work packages, all PRINCE2 products are made available, although the client is not forced to use any of them. However, it is possible for clients to make the use of any particular product mandatory, and to tailor its approval process to suit their own requirements.

The system's Gantt chart can be edited using drag and drop and the user can elect to plan a project using the Principal Toolbox facilities or to use the facility to import a previously planned project from Microsoft Project.

A set of pre-defined reports is supplied with the system, which can be edited. New reports can be defined and saved for future re-use. The output of all reports can be copied to the clipboard for export to any other application.

Documents can be added to the system at any level and a folder system can be created at each level. Both files and URLs can also be stored. Documents are stored within Principal Toolbox's database and, if a third-party document management system is used, a link to that can be incorporated.

Logs are provided for recording issues, risks, quality reviews, changes, lessons learned, minutes of meetings and daily actions. Issues and risks can be assigned to owners and their status can be monitored. Whenever a logged item is altered, an email notification of the change can be sent. Old programmes and projects can be archived.

Fortes Solutions has indicated that, in their opinion, the design and use of these products fall within the field of guidance offered by the OGC Business Change Guidance documents covering Portfolio Management, Programme Management, Project Management, Benefits Management and Risk Management. I can confidently state that using the Principal Toolbox system in the way that it has been designed to operate, will assist compliance with the appropriate guidelines. Fortes Solutions also states that their product offers dedicated PRINCE2 support. I am satisfied that using Principal Toolbox would encourage and facilitate PRINCE2 compliance at every stage and confirm that Fortes Solutions has sought to ensure that their product is fully PRINCE2 compliant.

The printed publicity material submitted with this application consisted of:

- 1) A page of 'Customer References'.

- 2) A copy of the 'Product Factsheet'.
- 3) A 'Principal Toolbox Features' brochure.

I have studied each of these documents. On the Product Factsheet I found the statement 'More success is guaranteed'. Because Fortes Solutions cannot guarantee something over which it has no control, I am of the opinion that this statement contains the potential to mislead a prospective purchaser of the tool. I raised this point with Fortes Solutions who agreed to remove the offending statement from the next reprint of the Factsheet, due within two weeks, satisfactorily resolving the issue.

On the same Product Factsheet I also found the statement 'PRINCE2 Project Management has never been so easy'. Because of the all-encompassing and generalised nature of this statement, I was unable to substantiate it. However, I am of the opinion that this is essentially advertising 'puff' and, as such, is unlikely to mislead any potential purchaser of the product.

I did not find any other claims or statements that could be construed as misleading and consider that these documents fairly represent the capabilities of the products.

I also carefully studied the Fortes Solutions Web site at www.principaltoolbox.com - a copy of which was provided to me on CD. I found that the Product Factsheet was available to download as a PDF file and that this also contained the statements detailed above. Fortes Solutions has agreed to remove the offending statement from this version of the Product Factsheet.

I also found a few references to operations and activities being 'easy'. This is, of course, a subjective opinion and as such is unable to be substantiated. However I regard these statements as more advertising 'puff' that are unlikely to misled anyone. I found no other statements that I was unable to substantiate.

Consequently, I recommend that, provided the agreed amendments to both versions of the Product Factsheet are made, Principal Toolbox be given the Silver Award and suggest that this assessment should now proceed to the Gold Stage. I suggest that Fortes Solutions is invited to supply details of two clients who have been using this application during the course of their business for a sufficient period to become well versed in the way that it works. My intention is to interview the people who use this software and discover whether their opinion is that it works as it should.

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