CA Clarity™ PPM

Accelerator for the PMBOK® Product Guide
Service Pack 02.0.01
This Documentation, which includes embedded help systems and electronically distributed materials, (hereinafter referred to as the “Documentation”) is for your informational purposes only and is subject to change or withdrawal by CA at any time.

This Documentation may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA. This Documentation is confidential and proprietary information of CA and may not be disclosed by you or used for any purpose other than as may be permitted in (i) a separate agreement between you and CA governing your use of the CA software to which the Documentation relates; or (ii) a separate confidentiality agreement between you and CA.

Notwithstanding the foregoing, if you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all CA copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION “AS IS” WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2012 CA. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.
Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At http://ca.com/support, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at http://ca.com/docs.
# Contents

## Chapter 1: PMBOK Guide Accelerator

PMBOK Guide Accelerator Overview ................................................................. 9
Access Groups ................................................................................................. 9
Project Templates ......................................................................................... 10
Project Tasks ................................................................................................. 11
Phases ............................................................................................................ 12
Document Review and Approval Processes ...................................................... 13
  How to Work with the Document Review Process ........................................ 14
  How to Work with the Document Approval Process ..................................... 14
  How to Work with the Change Request Review Process .............................. 15
PMBOK Guide Document Components ............................................................ 15

## Chapter 2: Installing the PMBOK Guide Accelerator

How to Set up PMBOK Guide Accelerator ...................................................... 17
  Create the Documents Your Organization Uses ........................................... 18
How to Install Add-Ins .................................................................................. 19
  Download the .iso Image File ................................................................... 19
  Extract the .jar File ..................................................................................... 20
  Stop the Services ....................................................................................... 20
  Install the Add-In ...................................................................................... 21
  Start the Services ...................................................................................... 22
  Apply the Add-In ...................................................................................... 24

## Chapter 3: Projects

View List of Projects ..................................................................................... 27
How to Start PMBOK Guide Projects ............................................................. 27
  Create Projects from PMBOK Guide Project Templates .............................. 28
  Define PMBOK Guide Accelerator-Specific Project Properties .................. 29
Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects .......... 31
Revert PMBOK Guide Projects to Standard CA Clarity PPM Projects ............ 32
Dashboard ...................................................................................................... 32
  Access the Dashboard ............................................................................... 33
  Project Status Portlet ............................................................................... 33
  View PMO Dashboard .............................................................................. 35
  Project by Variance and Performance Portlet ............................................ 36
  Project Checklist Portlet .......................................................................... 37

Contents 5
Chapter 4: Documents

How to Work with PMBOK Guide Documents ................................................................. 43
  Manage Access to PMBOK Guide Documents ............................................................... 44
  Submit Documents for Review ....................................................................................... 44
  Review Documents from Action Items ........................................................................... 45
  Review and Approve Documents from Action Items ..................................................... 45
Product Description Documents ....................................................................................... 46
  Create Product Description Documents ..................................................................... 46
  View List of Product Description Documents .......................................................... 47
  Edit Product Description Documents ......................................................................... 49
Project Charter Documents .............................................................................................. 50
  Create Project Charter Documents ........................................................................... 50
  View List of Project Charter Documents .................................................................. 52
  Edit Project Charter Documents .............................................................................. 54
Project Scope Statement Documents ............................................................................... 55
  Create Project Scope Statement Documents ........................................................... 55
  View List of Project Scope Statement Documents .................................................. 56
  Edit Project Scope Statement Documents ................................................................ 57
Scope Management Plan Documents .............................................................................. 58
  Create Scope Management Plan Documents ............................................................ 58
  View List of Scope Management Plan Documents .................................................. 60
  Edit Scope Management Plan Documents ................................................................ 60
Quality Management Plan Documents ............................................................................ 61
  Create Quality Management Plan Documents .......................................................... 61
  View List of Quality Management Plan Documents ................................................ 62
  Edit Quality Management Plan Documents ................................................................ 62
Risk Identification - SWOT Analysis Documents ............................................................ 63
  Create Risk Identification - SWOT Analysis Documents ........................................ 63
  View List of Risk Identification - SWOT Analysis Documents .................................. 64
  Edit Risk Identification - SWOT Analysis Documents .............................................. 64
Project Report Documents ............................................................................................ 65
  Create Project Report Documents ............................................................................ 65
  View List of Project Report Documents ................................................................... 69
  Edit Project Report Documents ............................................................................... 70
Lessons Learned Documents .......................................................................................... 72
  Create Lessons Learned Documents ........................................................................ 72
View List of Lessons Learned Documents ................................................................. 74
Edit Lessons Learned Documents ............................................................................ 75
Project Closure Documents ...................................................................................... 76
Create Project Closure Documents ........................................................................... 76
View List of Project Closure Documents ................................................................... 78
Edit Project Closure Documents ................................................................................ 79

**Chapter 5: Management Views**

Access the Detailed Management Views .................................................................. 81
Project Charters ............................................................................................................ 81
Project Reports ............................................................................................................ 83
Risks, Issues, and Change Requests ........................................................................... 86
  - Project Risks Portlet ............................................................................................... 86
  - Project Issues Portlet .............................................................................................. 88
  - Project Change Requests Portlet ............................................................................ 90
Lessons Learned ........................................................................................................ 91
Executive Dashboard .................................................................................................. 92
  - Project Status Portlet ........................................................................................... 92
  - Project Variance and Performance Portlet ............................................................ 95
Projects by Phases Portlet .......................................................................................... 97

**Appendix A: Reports**

Project Report ........................................................................................................... 99
Project Status Snapshot .............................................................................................. 100

**Appendix B: Access Rights**

PBK Administrator Group Access Rights .................................................................. 103
  - PMBOK Guide Accelerator Access Rights ............................................................ 103
  - CA Clarity PPM Access Rights ............................................................................. 118
PBK Project Manager Group Access Rights ............................................................... 135
  - PMBOK Guide Accelerator Access Rights ............................................................ 135
  - CA Clarity PPM Access Rights ............................................................................. 145
PBK Team Member Group Access Rights .................................................................. 153
  - PMBOK Guide Accelerator Access Rights ............................................................ 153
  - CA Clarity PPM Access Rights ............................................................................. 155
PBK Executive Group Access Rights .......................................................................... 156
  - PMBOK Guide Accelerator Access Rights ............................................................ 156
  - CA Clarity PPM Access Rights ............................................................................. 160
Chapter 1: PMBOK Guide Accelerator

This section contains the following topics:

- PMBOK Guide Accelerator Overview (see page 9)
- Access Groups (see page 9)
- Project Templates (see page 10)
- Project Tasks (see page 11)
- Phases (see page 12)
- Document Review and Approval Processes (see page 13)
- PMBOK Guide Document Components (see page 15)

PMBOK Guide Accelerator Overview

The CA Clarity PPM Accelerator for the PMBOK Guide (PMBOK Guide Accelerator) is an add-in that consists of a set of dashboards, portlets, project templates, document templates, processes, and access rights. Use your organization project management knowledge and practices to help you structure your project and define the information needed throughout your project lifecycle.

This add-in provides a starting point from which you can configure CA Clarity PPM to support your PMBOK Guide best practice project management activities. Use this accelerator as is, or let your CA Clarity PPM administrator set up your system to reflect the interpretation and implementation of the PMBOK Guide project management best practices.

The PMBOK Guide is highly descriptive not prescriptive. No requirements stipulate to use certain project management practices. The PMBOK Guide provides you with guidelines that are based on industry best practices. Thus, what is valid for your organization cannot be valid for another. Use the PMBOK Guide best practices that best meet your organization needs. They are generally accepted best practices by project managers in certain global regions.

Visit the PMI website, PMI.org, for more information about A Guide to the Project Management Body of Knowledge (PMBOK Guide).

Access Groups

The PMBOK Guide Accelerator includes access groups. Each access group includes access rights that allow group members access to secured CA Clarity PPM pages, dashboards, portlets, and documents. The content included with this add-in is designed for these access groups.
The following describes the access groups:

- **PBK Project Manager.** Members of the access group are project managers concerned with the direction and performance of their investments and the projects under them. They create, monitor, review, model, and approve portfolios of projects, projects and other work goals of project managers under them. The project managers also manage the schedule, resources, tasks, risks, and issues.

- **PBK Executive.** Members of this access group monitor the progress of their projects and manage change in scope. They review and approve documents, and review project plan updates. Add this group to resources to be assigned as document reviewers or members of the change control board.

- **PBK Team Member.** Members of this access group complete their assigned tasks on schedule. They review project tasks, schedules, reports, and documents and log time spent on their tasks using Timesheets.

- **PBK Administrator.** Members of this access group are administrators that set up CA Clarity PPM and the PMBOK Guide Accelerator. The project team can then begin working with their projects.

---

**Project Templates**

The PMBOK Guide Accelerator includes project templates exclusive to this add-in. Creating new PMBOK Guide projects also requires creating them from one of the PMBOK Guide project templates, or from a project template created from a PMBOK Guide project template. This ensures that your new projects can use the PMBOK Guide Accelerator features.

The project templates are ready to use; no further set up is necessary. However, configure and duplicate them to create new project templates for each of your organization project types.

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

The following project templates are included:

**PMBOK® Guide Project Template**

When you create a project from this template, the project includes:

- The PMBOK Guide documents, which are based on templates from *The PMI® Compendium of Project Management Practices*, and related processes
- The PMBOK guide layout page
- PMBOK Guide portlets that display on the project dashboard page
PMBOK® Guide Project Planning Checklist Template

This project template includes the same features as the PMBOK® Guide Project Template. Also includes a high level list of project key tasks. The project manager can use these tasks to manage project execution or to do project planning.

Project Tasks

PMBOK Guide project key tasks are included with the project you create new from the PMBOK® Guide Project Planning Checklist Template project template, or from project templates based on the template. These tasks display in the project task list and in the project checklist portlet on the dashboard. These tasks match the project planning checklist in The PMI® Compendium of Project Management Practices.

Use the project tasks as is, or edit them to match the types used by project managers. For example, project managers can edit the project template with tasks that have time and resources associated with them. Project managers can add, remove, and reorder tasks.

See the Project Management User Guide for more information.

The following key tasks are included:

- Goals and objectives
- Scope
- Major deliverables
- WBS
- Top-down planning estimates
- Major milestones
- Master integrated schedule
- Product and services requirements
- Phase Plan
- Organization Plan
- Performance, evaluation and test plan
- Change Control Plan
- Problem Tracking Plan
- Documentation Plan
- Education Plan
Phases

- Communication Plan
- Legal and Regulatory Requirements Plan
- Risk Assessment
- Risk Management Plan
- Reliability, Availability, and Usability Plan
- Preliminary Support Plan
- Interdependencies Plan
- Resources Plan
- Project Plan
- Opportunity Costs
- Budget
- Financial Analysis
- Integrated Business and Realization Plan
- Functional Deliverables
- Top-level Architecture Specification Plan
- High-Level Functional Specifications
- Bottom-up Task Estimates by functional groups
- Detailed Functional Planning and Schedules
- Functional Schedule Critical Path Analysis
- Master Schedule Critical Path Analysis
- Functional Coach Approval and Commitment
- Master Schedule and Plan
- Planning Phase Checklist

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

Phases

Project managers use the project phase to reflect the current phase of the project. Select the project phase using the Phase field that displays on the project properties page. Your CA Clarity PPM administrator can define different sets of phases for different project types.
Document Review and Approval Processes

Actions such as submitting a document for review from PMBOK Guide documents, trigger processes that move the document through a review or approval cycle.

Use the processes as is, or let your CA Clarity PPM administrator configure them to match the review and approval cycle. Also, view a diagram of the process flow on the process flow diagram page of process definition.

See the Administration Guide for more information.

The following review-type processes are included:

- Change Request Review
- Lessons Learned Review
- Project Closure Review
- Project Report Review
- Project Scope Statement Review

The following approval-type processes are included:

- Product Description Approval
- Project Charter Approval
How to Work with the Document Review Process

Create a topic for each of the exercise and work within the topic. The document review process pertains to the lessons learned, project scope statement, project report, and project closure documents, all of which go through a similar workflow.

The following tasks are involved in the review of the documents in the management of a typical PMBOK Guide project:

1. **The project manager defines the resources who review and approve the documents that require a review.** (see page 29)
2. **The project manager creates and saves the document.** (see page 28)
3. **The project manager submits the document for review.** (see page 44) The review process is initiated.
4. **The reviewer receives an action item to review the document and completes their review.** (see page 45) Once all reviewers assigned to the project complete their review of the document, the status of the document changes to "Reviewed". The review process ends.

How to Work with the Document Approval Process

The document approval process pertains to the product description and project charter documents, both of which go through a similar workflow.

The following are the approval tasks for the documents related to the management of a typical PMBOK Guide project:

1. **The project manager defines the resources who review and approve the documents that require a review and approval.** (see page 29)
2. **The project manager creates and saves the document.** (see page 28)
3. **The project manager submits the document for approval.** (see page 44) The document is locked from further updates and the approval process is initiated.
4. The reviewer does one of the following:
   - **Approves the document.** (see page 45) The status of the action item changes to "Approved", and the document Approval Status is set to "Approved".
   - **Rejects the document.** (see page 45) The status of the action item changes to "Rejected", and the document Approval Status is set to "Rejected".

**Note:** If reviewers reject the document, the status of the action item changes to "Rejected" even if other reviewers approve the document, or leave the document status as "Open".

Once all reviewers assigned to the project complete their review of the document and approve the document, the process changes the status of the document to "Approved". The review process ends.
How to Work with the Change Request Review Process

The Change Request Review process pertains to the project plan updates included in change requests. The following tasks are involved in the review of project plan updates, which are part of the management of a typical PMBOK Guide project:

1. The project manager defines the resources who review the project plan updates included in change requests. (see page 29)
2. The project manager creates and submits the project plan update. (see page 41) The process is initiated.
3. The change control board member receives an email notification from the project manager to review the document (see page 42). The review process ends.

PMBOK Guide Document Components

PMBOK Guide documents consist of the following components. The CA Clarity PPM administrator controls the access to the components to grant the CA Clarity PPM access rights.

Reports

You can export report data to a Microsoft Excel spreadsheet so that you can perform statistical operations, such as SUM and AVERAGE. To export your results to Excel, open the report, and select Export to Excel.

See the Basics User Guide for more information.

Actions Menu and Edit Mode

You can edit some of the document data directly from the list page for that document type. For example, for project scope statement documents not yet submitted for review, edit the scope statement name, and review completed date directly from the list page.

To edit the fields on list pages, click Edit.

See the Personalizing CA Clarity PPM User Guide for more information.

Processes

You can view initiated processes, or create new ones using the Processes page. For example, create a process that notifies the managers when the status of a document changes to "Approved." You can also define a process to take an action, such as changing the project progress to "Completed."

See the Administration Guide for more information.
Audit Trail

Audit Trail keeps a historical record of all changes, additions, and deletions that occurs to specified document fields. Use the page to view a log of change, addition, or deletion records for any of the fields for auditing.

Audit Trail appears if your CA Clarity PPM administrator has set it up and if you have the appropriate access rights. The CA Clarity PPM administrator also determines the fields to audit and the information stored in the audit trail.

See the Administration Guide for more information.

See the Personalizing CA Clarity PPM User Guide for more information.
Chapter 2: Installing the PMBOK Guide Accelerator

This section contains the following topics:

- How to Set up PMBOK Guide Accelerator (see page 17)
- How to Install Add-ins (see page 19)

How to Set up PMBOK Guide Accelerator

Use the following process to set up the PMBOK Guide Accelerator. Most of the steps in this process are done in the Administration Tool, except when noted. These steps should be done by your CA Clarity PPM administrator:

See the Administration Guide for more information.

- Do the following for each administrator, project manager, team member, and executive who will be working with PMBOK Guide projects and documents:
  - Create a resource. Make sure you enter valid email addresses for all project managers and the resources identified as reviewers so that email notifications are successfully sent and received.
  - Add the appropriate PMBOK Guide Accelerator access group to the resource.
- Modify the phases included with the Standard phase type, and define any additional sets of phases to meet the organization project needs.
- Create project templates for each of the organization project types.
  See the Project Management User Guide for more information.
- Modify the tasks that are part of the template(s) to match the tasks that the project type uses. You can modify tasks to use terminology that your team uses and add any attributes for tasks of standard project types, such as effort, cost, and resources.
  See the Studio Developer’s Guide for more information.
- Create the additional PMBOK Guide documents that your organization uses. (see page 18)
- Assign the global access rights for the new PMBOK Guide documents to the appropriate PMBOK Guide Accelerator access group.
How to Set up PMBOK Guide Accelerator

- Configure the documents to meet the organization needs, and disable or delete any documents the project team does not use.
  See the Studio Developer’s Guide for more information.
- Activate the PMBOK Guide processes.

Create the Documents Your Organization Uses

The PMBOK Guide Accelerator includes a set of PMBOK Guide documents that are part of the PMBOK Guide project templates. This procedure details how to create and define the additional PMBOK Guide project documents that are used by your organization and add them to the template. When project managers use a PMBOK Guide template to create a new project, the set of documents is included with the new project.

You create a document as a subobject to the Project object using Studio. Users access the subobject from a subpage that displays as a link on the properties menu for PMBOK Guide projects.

By default, the subpages added to the project object view displays for standard CA Clarity PPM projects and PMBOK Guide projects. If you do not require the projects to display the new document link on the properties menu, add the display condition that limits the display of the subpage to only PMBOK Guide projects.

See the Studio Developer’s Guide for more information.

Follow these steps:

1. Create a new object and select Project as the master object.
   A new subobject for the document is created. A new subpage for the project's Properties view is also created.
2. Add attributes to the new object.
   The document includes fields.
3. Open the Project object, click to edit the project properties view, and open the new subpage.
   The property layout page appears with the new subpage listed.
4. Define the new subpage properties, such as modifying the label for the link that displays for users on the properties menu.
   The subpage properties page appears.
5. Add the following display condition so that the subpage displays for PMBOK Guide projects only:
   ( Project PBK Project Flag = 1 )
   The new PMBOK Guide document is created.
How to Install Add-Ins

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

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

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

1. Download the .iso image file (see page 19).
2. Extract the .jar file (see page 20).
3. Stop the services (see page 21).
4. Install the add-in (see page 22).
5. Start the services (see page 22).
6. Apply the add-in (see page 24).

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

The universes and stock reports are stored in the Business Intelligence Archive Resource (BIAR) file included with the add-in. If your company takes advantage of the new Business Objects reporting security model, import the BIAR file using the Business Objects Import Wizard. Repeat the steps you used for importing the CA Clarity PPM universe and stock report information to import the BIAR file for the add-in.

BIAR file name: CA_Clarity_PBK.BIAR

Download the .iso Image File

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

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

Mount .iso Image Files Using Unix

On UNIX platforms, use the .iso image file directly through the DVD emulation provided with some of the operating environment DVD device drivers. For Linux systems, you can use the .iso image by mounting it on the .iso file system driver.
To mount the .iso image file using Unix, open a command prompt and issue a command similar to the following:

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

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

**Write .iso Image Files to DVDs**

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

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

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

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

**Extract the .jar File**

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

The .jar file includes the following files:

- **install.sh**
  - The UNIX installation script.

- **install.bat**
  - The Windows installation script.

- **install.xml**
  - The Ant installation script.

- **package**
  - The directory of updated files.
tools

The directory of supporting files.

Follow these steps:
1. Open a command prompt, and issue the following command:
   `jar -xvf <filename>`
   The command extracts the contents of the .jar file to the same location where the .jar file resides.
2. For a UNIX environment, issue the following command:
   `chmod +x install.sh`
   This grants execution privileges for the install script.

Stop the Services

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

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

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

Stop Services Using Apache Tomcat

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

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

Stop Services Using Oracle WebLogic/IBM WebSphere

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

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

For more information, see the J2EE vendor documentation.

Install the Add-In

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

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

Follow these steps:

1. Open a Command Prompt window at the directory location where you extracted the .jar files, and issue the following command:
   ```
   install
   ```

2. Press Enter.
   The installation process begins.

3. Follow the on-screen directions to complete the add-in installation.

Start the Services

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

The following sections explain how to start the services in different server configurations.
Start Services Using Apache Tomcat (Single Server)

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

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

Start Services Using Apache Tomcat (Multiple Servers)

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

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

Start Services Using Oracle WebLogic/IBM WebSphere

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

Follow these steps:
1. Log in to CA Clarity System Administration.
2. Open the Installation menu, and click Install and Upgrade.
   The install and upgrade database page appears.
3. Click Package Application Ear.
4. Click Create Package.
   The application creates a package and the niku.ear.
5. Deploy the (niku.ear) package using the J2EE application server administration console.

Apply the Add-In

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

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

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

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

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

  **Important!** Consider the configurations that you have made to items before applying them. Applying modified items overwrites your configurations.
- Installed. Items that are installed.

**Type**
Indicates the item type.

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

**ID**
Displays the add-in item code, which is the identifier of the applied add-in item.
Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-ins.
   The add-ins page appears.
3. Click the name of the add-in to apply items.
   The details page for the add-in appears.
4. Review the items in the list and select for applying.
   **Note:** By default, when you upgrade to the current add-in version, the items that are new or modified are selected.
5. (Upgrade Only) For all active process instances with the "Upgrade Ready" status, cancel and delete the process instance.
   Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.
6. Click Apply.
   **Note:** If a selected item has dependencies on other items, the dependencies are also updated.
   A list of updated items displays on the confirmation or install page.
7. Click Yes.
   If a user has previously changed an item listed on the confirmation or install page, publish the item before displaying the update to the users.
   See the *Studio Developer’s Guide* for more information.
Chapter 3: Projects

This section contains the following topics:

View List of Projects (see page 27)
How to Start PMBOK Guide Projects (see page 27)
Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects (see page 31)
Revert PMBOK Guide Projects to Standard CA Clarity PPM Projects (see page 32)
Dashboard (see page 32)
How to Work with Project Plan Updates (see page 40)

View List of Projects

View a list of projects using the project list page, or from the detailed management views.

To view a list of projects, open the Portfolio Management menu, and click Projects.

You can roll up PMBOK Guide projects into other programs and portfolios like you can with standard CA Clarity PPM projects. The data from the projects display in various portfolio and program dashboards and dashboard layouts. The data is also included in management views and reports.

See the Project Management User Guide for more information.

How to Start PMBOK Guide Projects

Use the following process to start PMBOK Guide projects:

1. Do one of the following:
   - Create a new project from a PMBOK Guide project template (see page 28).
   - Convert an existing CA Clarity PPM project to a PMBOK Guide project (see page 31)
2. Define the PMBOK Guide project properties. (see page 29)
3. As your project progresses, create the PMBOK Guide documents. (see page 28)
4. View PMBOK Guide project data in management views. (see page 81)
5. Export the data to Microsoft Excel or run a report.

See the Basics User Guide for more information.
Create Projects from PMBOK Guide Project Templates

For your project to include PMBOK Guide features, the project requires being a PMBOK Guide project. Use the following procedure to create a new PMBOK Guide project from a PMBOK Guide project template.

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. Select a PMBOK Guide project template, and click Next.
   The create page appears.
4. Complete the following fields in the General section:
   - **Project Name**
     Defines the name for the project.
     - **Limits:** 80 characters
     - **Required:** Yes
   - **Project ID**
     Defines the unique identifier for the project that is typically auto-numbered.
     - **Limits:** 20 characters
     - **Required:** Yes
   - **Page Layout**
     Specifies the page layout to view project or program data.
     - **Values:**
       - Program Layout. Use the layout to view budget data on the project dashboard page.
       - Project Default Layout. Use the layout to view the default labor and team utilization charts on the project dashboard page.
       - Program Status Dashboard. Use the layout to view PMO program-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the *PMO Accelerator* for more information.
Project Status Dashboard. Use this layout to view PMO project-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.

See the *PMO Accelerator* for more information.

- PMBOK® Guide Layout. Use this layout to display the PMBOK Guide-specific data on the project dashboard page.

**Default:** PMBOK® Guide Layout

5. In the Organizational Breakdown Structure section, click the Browse icon next to the OBS to associate with the project for security, organizational, or reporting purposes. The Department OBS is used to associate the project with a department. It is listed last if multiple OBS exist.

See the *Basics User Guide* for more information.

6. Complete the following fields in the Copy Template Project Options section, and save:

**Template Name**

Displays the name of the template associated with the project.

**Scale Work By**

Defines the percentage to scale the work for the project.

**Default:** 0%

**Scale Budget By**

Defines the percentage to scale the budget for the project.

**Default:** 0%

**Convert resources to roles**

Specifies to convert resources to roles for the project.

**Default:** Cleared

The PMBOK Guide project is created.

### Define PMBOK Guide Accelerator-Specific Project Properties

Use the PMBOK Guide Accelerator-specific fields on the project properties page to define the project. Specify the portlets and data to display on the project dashboard page, define the phase, identify the resources to review the documents, and update project plan in change request for review and approval.
Follow these steps:

1. Open the project.
   The project properties page appears.

2. Define the following field in the General section:
   **Page Layout**
   Specifies the page layout to view project or program data.
   **Values:**
   - Program Layout. Use the layout to view budget data on the project dashboard page.
   - Project Default Layout. Use the layout to view the default labor and team utilization charts on the project dashboard page.
   - Program Status Dashboard. Use the layout to view PMO program-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the PMO Accelerator for more information.
   - Project Status Dashboard. Use this layout to view PMO project-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the PMO Accelerator for more information.
   - PMBOK® Guide Layout. Use this layout to display the PMBOK Guide-specific data on the project dashboard page.
   **Default:** PMBOK® Guide Layout

3. Complete the following fields in the Reviewers section, and save:
Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects

Reviewers
Specifies the names of the resources responsible for reviewing and/or approving the project PMBOK Guide documents.

Note: Define at least one resource as a reviewer. Otherwise, action items are not sent during the review or approval process. You can later define a reviewer to trigger the process to send an action item.

Change Control Board
Specifies the names of the resources who are members of the change control board. The resources are responsible for reviewing and approving project plan updates included in change requests.

Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects

Use the following procedure to convert standard CA Clarity PPM projects to PMBOK Guide projects.

Follow these steps:
1. Open the Project Conversion menu, and click Project Conversion.
   The project conversion page appears.
2. Click New.
   The create project conversion page appears.
3. Complete the following fields, and save:

   Conversion Type
   Specifies the type of conversion. Select Non-PMBOK to PMBOK.

   Values:
   - PMBOK Guide to Non-PMBOK Guide. Converts a PMBOK Guide project to a standard CA Clarity PPM project.
   - Non-PMBOK Guide to PMBOK Guide. Converts a standard CA Clarity PPM project to a PMBOK Guide project.

   Projects
   Defines the names of the projects to convert. Click the Browse icon, select the check box next to each project, and click Add.

   The specified projects are converted to PMBOK Guide projects.
Revert PMBOK Guide Projects to Standard CA Clarity PPM Projects

Use this procedure to convert projects created from PMBOK Guide project templates to standard CA Clarity PPM projects.

Follow these steps:

1. Open the Project Conversion menu, and click Project Conversion.
   The project conversion page appears.
2. Click New.
   The create project conversion page appears.
3. Complete the following fields, and save:

   Conversion Type
   Specifies the type of conversion. Select PMBOK Guide to Non-PMBOK Guide.
   Values:
   - PMBOK Guide to Non-PMBOK Guide. Converts a PMBOK Guide project to a standard CA Clarity PPM project.
   - Non-PMBOK Guide to PMBOK Guide. Converts a standard CA Clarity PPM project to a PMBOK Guide project.

   Projects
   Defines the names of the projects to convert. Click the Browse icon, select the check box next to each project, and click Add.
   The specified projects are converted to standard CA Clarity PPM projects.

Dashboard

Use the project dashboard page to get project status information including PMBOK Guide fields and statuses. This page contains the overall picture and the performance of the PMBOK Guide project in portlets.

**Important!** Select the layout for the PMBOK® Guide Layout page for the portlets to display.

The following portlets are included:

- Project Status (see page 33). The portlet displays information similar to that on the project status page. The portlet contains metrics and status information for the PMBOK Guide project open.
PMO Dashboard. If the PMO Accelerator is installed, the portlet displays a link to access the PMO Dashboard.

Project by Variance and Performance (see page 95). The portlet displays information similar to that on the project variance and performance page of the executive dashboard. But contains at the task level with metrics and status information for the PMBOK Guide project open.

Project Checklist (see page 37). The portlet displays a list of the key tasks. Includes such details as the task name, start, and end date, the resource assigned to the task, the status, the percent completed, and any comments.

Project Document Review Status (see page 39). The portlet displays a list of your most recent project report documents submitted for review and review status updates.

Access the Dashboard

Before you can access and view PMBOK Guide Accelerator-specific portlets and data on the project dashboard, select the PMBOK® Guide Layout page layout. The Page Layout field is a field that displays in the General section of the project properties page.

Follow these steps:
1. Open the project.
   The properties page appears.
2. Click Dashboard.
   The project dashboard page appears.

Project Status Portlet

Use the Project Status portlet on the project dashboard page to view metrics and status information for the PMBOK Guide project.

See the Project Management User Guide for more information.

This portlet contains the following information:

Project Phase
   The phase for this project. This metric is used in portfolio management analysis.

Values for Standard Phase Type: Requirements, Design, Build, Test, and Launch
**Start**

Defines the date of starting the project. The value for the field is based on the Start Date the schedule page of project properties.

**End**

Defines the date of completing the project. The value for the field is based on the schedule page of project properties page.

**Days Late Status**

Displays a stoplight to represent the number of days the project is late, which value is based on the Days Late field on the project dashboard page.

**Stoplight:**

- Grey. The project schedule data is undefined.
- Green. The project is on schedule.
- Yellow. The project is late by <= 2 Days.
- Red. The project is late by > 2 Days.

**Days Late**

Displays the number of days the project or the key task is late, based on the following formula:

\[
\text{Days Late} = \text{Current Due Date} - \text{Baseline Due Date}
\]

**Risk Status**

Displays a stoplight to represent the project status level with risks. The value for the field is based on the highest probability of open risks entered on the risks page.

**Stoplights:**

- Grey. The project has no risk data.
- Green. All of the project risks are of low priority.
- Yellow. The project has at least one risk of medium priority and no high priority risks.
- Red. The project has at least one risk of high priority.

**Issue Status**

Displays the project status level with issues in the form of a stoplight to represent the status. The value for this field is based on the Status field on the issue properties page.

**Default:** Open
Stoplights:
- Grey. The project has no issue data.
- Green. All of the project issues are of low priority.
- Yellow. At least one of the project issues is of medium priority and no high priority issues exist for the project.
- Red. At least one of the project issues is of high priority.

Change Requests Status
Displays a check mark if at least one change request is logged for the project. You can mouse over the check mark to display the number of change requests created in the rollover text.

Project Outlook
Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

Values:
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

Stoplights:
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

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.
Project by Variance and Performance Portlet

You can evaluate a project in terms of schedule and budgeted cost variance on the phase or task level using the Project by Variance and Performance portlet that displays on the Project Dashboard page. This portlet displays a list of the key tasks and details such as the planned value, actual cost, earned value, planned finish date, and percent complete.

You can view project-specific task data from the following columns on this portlet:

**Task**
- Displays the task name. Use the task name link to open the task.

**Start**
- Displays the date for starting the task. The value for the field is derived from the Start field on the task properties page.

**End**
- Displays the date for completing the task. The value for this field is derived from the Finish field on the task properties page.

**Days Late**
- Displays the number of days the project or the key task is late, based on the following formula:
  \[ \text{Days Late} = \text{Current Due Date} - \text{Baseline Due Date} \]

**% Complete**
- Displays the percent of work completed for partially completed tasks. The value for this field is from the % Complete field on the task properties page.

**Actual Cost**
- Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

**Planned Value**
- Displays the planned value (PV) is a system-calculated value representing the Budgeted Cost of Scheduled Work (BCWS). PV is the authorized budget assigned to the project work not started, or a work breakdown structure component. The total planned value for the project is also known as Budget At Completion (BAC).

PV is calculated based on the following formula:
\[ \text{Planned Value (PV)} = \text{Sum of BAC through a point in time} \]


Earned Value
Displays the earned value (EV) is system-calculated and represents the Budgeted Cost of Work Performed (BCWP). EV is the value indicated in the the approved budget for project work performed, or work breakdown structure component.

EV is calculated using the following formula:
Earned Value (EV) = Budget At Completion (BAC) for a task x % Complete

Cost Variance
Displays the cost variance (CV), which is the value of work accomplished as against the amount spent to date.

CV is calculated using the following formula:
Cost Variance (CV) = Earned Value (EV) - Actual Cost (AC)

Project Checklist Portlet

Use the project checklist portlet on the project dashboard page to view the status of the selected project tasks as a checklist.

The following fields display on the portlet:

Checklist Item/Resource
Displays the task name. When you assign resources to the task, you can expand the list to view their names.

Start
Displays the date for starting the task. The value for the field is derived from the Start field on the task properties page.

End
Displays the date for completing the task. The value for this field is derived from the Finish field on the task properties page.
Dashboard

**Status**
Displays the status of the task based on the value of % Complete. This field is automatically calculated and updated based on the task % Complete value.

**Values:**
- **Completed.** Indicates that the ETC task is zero and the percentage completed is 100.
- **Not Started.** Indicates that actuals are not posted and the percentage completed is zero.
- **Started.** Displays when a resource posts actuals to the task assignment. The percentage completed on the task is more than zero and less than 100.

**Default:** Not Started

**% Complete**
Displays the percentage of work completed for partially completed tasks. The value for the field is derived from the % Complete field on the task properties page.

**Comments**
Defines the comments related to the task. When the Project Checklist field is selected and the task is saved, the comments in the field are displayed with the task in the Project Checklist portlet on the dashboard.

**Limits:** 80 characters

**View Project Task Status Information in the Project Checklist**
You can use the project checklist portlet that displays on the project dashboard page to view task-related data, such as status information.

**Follow these steps:**
1. Open the project to view project task information.
   The project properties page appears.
2. Click Dashboard.
   The project dashboard page appears.

**Include Project Tasks in the Project Checklist**
Projects created using the PMBOK® Guide Project Planning Checklist Template project template include project tasks that are, by default, displayed in the project checklist. The project checklist in the Project Checklist portlet is displayed on the project dashboard page.
If the project tasks have the Project Checklist field selected, specifies the task as a project checklist item. The Project Checklist field displays on the task properties page.

New tasks you create from PMBOK Guide projects are not included in the project checklist by default. Use the following procedure to include them in the checklist.

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

**Follow these steps:**

1. Open the project and the task.
   
   The properties page appears.

2. Complete the following fields, and save:

   **Project Checklist**
   
   Specifies to include the task in the Project Checklist portlet. The portlet displays on the project dashboard page. When selected, the task is included in the list.

   **Default:** Cleared

   **Comments**
   
   Defines the comments related to the task. When the Project Checklist field is selected and the task is saved, the comments in the field are displayed with the task in the Project Checklist portlet on the dashboard.

   **Limits:** 80 characters

   The task is included in the project checklist.

**Copy Key Tasks to Projects**

You can copy the tasks from the PMBOK® Guide Project Planning Checklist Template project template to a project that does not already have them.

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

**Project Document Review Status Portlet**

Use the Project Document Review Status portlet that displays on the project dashboard page to receive quick status updates on the latest documents submitted for review or approval. The portlet provides the latest data of each document type submitted, the document current review or approval status, and the names of any pending reviewers.

The following fields display on the portlet:

**Documents**

Displays the name of the latest document submitted. Click a document name to open the properties page for the latest document submitted.
How to Work with Project Plan Updates

Project plan updates are updates to the project plan or the supporting details. Project plan updates reflect the change requests that the change control board reviews and approves.

See the *Project Management User Guide* for more information.
Use the following process to work with project plan updates:

1. The project manager updates the project plan or supporting details.
2. The project manager creates a change request.
3. The project manager creates and submits the project plan update. (see page 41) An email notification is sent from the project manager to the change control board members.
4. The change control board reviews the project plan update details. (see page 42)

Note: Ensure that the project manager is notified that the email notification was successfully sent by adding the project manager as a change control board member. Let your CA Clarity PPM administrator configure the Change Request Review process to send email notifications to the project manager.

Create and Submit Project Plan Updates

When you submit a project plan update for review, the Change Request Review process starts. This process sends an email notification from the project manager to the change control board members to review the document. Once the email notification is sent, the Notify Change Control Board field on the project plan update page of change request properties is cleared. This allows the project manager to create and send further project plan updates.

See the Project Management User Guide for more information.

Follow these steps:

1. Open the project.
   The properties page appears.
   The risks/issues/changes page appears.
3. Click Change Requests.
   The change requests page appears.
4. Open the change request.
   Note: If the change request to create a project plan is not already created and displayed in the list, create and save the change request.
   The change request properties page appears.
5. Open the Properties menu and click Project Plan Update.
   The project plan update page appears.
6. Define the following fields:

**Project Plan Change(s)**
 Specifies the areas in the project affected by the change.

**Notify Change Control Board**
 Specifies to send an email notification to the change control board members about modifications to the project. Select the check box to specify sending the email notification.

*Default: Cleared*

**Project Plan Update Description**
 Defines the modifications that have been made to the project plan. The text you enter here is used as the body of the email.

*Limit: 2000 characters*

7. Save the changes.

The project plan update email notification is sent from the project manager to each member of the change control board.

**Review Project Plan Updates from Email Notifications**

The resources identified as members of the change control board for the project receive email notifications from the project manager each time the project manager submits a project plan update. The project manager can change the resources who are identified as change control board members by editing the names listed in the Change Control Board field on the project properties page.

Use this email to review a summary of the changes. You can create comments and requests for clarification, if necessary.

**Important!** Make sure that the project manager and the resources identified as change control board members enter valid email addresses in CA Clarity PPM to send and receive email notifications successfully.
Chapter 4: Documents

This section contains the following topics:

- **How to Work with PMBOK Guide Documents** (see page 43)
- **Product Description Documents** (see page 46)
- **Project Charter Documents** (see page 50)
- **Project Scope Statement Documents** (see page 55)
- **Scope Management Plan Documents** (see page 58)
- **Quality Management Plan Documents** (see page 61)
- **Risk Identification - SWOT Analysis Documents** (see page 63)
- **Project Report Documents** (see page 65)
- **Lessons Learned Documents** (see page 72)
- **Project Closure Documents** (see page 76)

### How to Work with PMBOK Guide Documents

The following process details how to work with PMBOK guide documents:

1. The project manager creates one of the following documents:
   - **Product Description** (see page 46)
   - **Project Charter** (see page 50)
   - **Project Scope Statement** (see page 55)
   - **Scope Management Plan** (see page 58)
   - **Quality Management Plan** (see page 61)
   - **Risk Identification - SWOT Analysis** (see page 63)
   - **Project Report** (see page 65)
   - **Lessons Learned** (see page 72)
   - **Project Closure** (see page 76)

2. **The project manager edits access to the documents.** (see page 44)

3. If necessary, the project manager edits the document:
   - **Product Description** (see page 49)
   - **Project Charter** (see page 54)
   - **Scope Management Plan** (see page 60)
   - **Project Scope Statement** (see page 57)
How to Work with PMBOK Guide Documents

- **Quality Management Plan** (see page 62)
- **Risk Identification - SWOT Analysis** (see page 64)
- **Project Report** (see page 70)
- **Lessons Learned** (see page 75)
- **Project Closure** (see page 79)

4. Depending on the type of document, the project manager submits the document for review or approval (see page 44). An action item is sent to the reviewer.

5. Depending on the type of document, the reviewer does one of the following:
   - Reviews the document. (see page 45)
   - Approves or rejects the document. (see page 45)

---

**Manage Access to PMBOK Guide Documents**

You can manage access to the PMBOK Guide documents using the links in the Access to this Object displayed when the document is open. Use the links to view, grant, and edit access rights to your document.

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

---

**Submit Documents for Review**

Not all documents require approval, but they all require review. When you submit a document for review, the document approval or document review process starts. The reviewer is sent an action item to review and/or approve the document. The process that is triggered to start is dependent on the type of document you are submitting for review.

**Note:** The scope management plan, quality management plan, and risk identification - SWOT analysis documents cannot be submitted for review.

The project manager can change the resources identified as reviewers by editing the names listed in the Reviewers field on the project properties page.

Once you submit your document for review, all the document fields become display-only.

**Follow these steps:**

1. Open the project.
   
The properties page appears.
2. Open the document to submit for review.
   The properties page for that document appears.

3. Select the check box for the Submit for Review field that displays in the General section of the page, and submit.
   The document is submitted for review.

**Review Documents from Action Items**

Project managers are responsible for creating PMBOK Guide documents and for submitting them for review. PMBOK reviewers receive action items to review the submitted documents in their Organizer. The reviewer reviews the document and marks completion with the "Reviewed" status.

See the *Basics User Guide* for more information.

**Follow these steps:**

1. Open the Personal menu and click Organizer.
   The organizer action items page appears by default.

2. Locate the action item, choose a status from the Status field for the action item, and save.
   **Values:** Reviewed, Not Reviewed
   **Default:** Not Reviewed

**Review and Approve Documents from Action Items**

Project managers are responsible for creating PMBOK documents, providing product descriptions and project charters, and submitting for approval. The resource, assigned as the reviewer of product description documents, receive an action item in their Organizer when the project manager submits the document for approval. The reviewer reviews the document and completes the action item marking the status as "Approved" or "Rejected".

**Follow these steps:**

1. Open the Personal menu and click Organizer.
   The organizer action items page appears by default.
2. Locate the action item, review the document, select a status from the Status field for the action item, and save.
   
   **Values:** Approved, Rejected, Open
   
   **Default:** Open
   
   The status of the action item is saved.

---

**Product Description Documents**

The product description document records the description of the product or service related to the project.

*See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.*

*See the PMI® Compendium of Project Management Practices for more information.*

---

**Create Product Description Documents**

Once you save the document, many of the fields in the General section of the properties page become visible, some of which are display only.

**Follow these steps:**

1. Open the PMBOK Guide project.
   
   The 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. Complete the following fields in the General section:

   **Title**
   
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

   **Limit:** 80 characters

   **ID**
   
   Displays the unique identifier for the document.

   **Limit:** 80 characters
5. Complete the following fields in the Report Information section:

**Product or Service**
Defines the name of the product or service.

**Purpose**
Defines the purpose for the product or service.

**Full Explanation**
Defines the full explanation of the product or service.

6. Complete the following fields in the Draft of Full Product or Service Description section:

- Functional and Performance Requirements
- Quality Requirements
- Cost Requirements
- Other


7. Define the following remaining fields in the Draft of Full Product or Service Description section, and save:

**Attachment(s)**
Specifies the attachments associated with the document.

**Description of Attachment(s)**
Defines the description of the attachments associated with the document.

**Limits:** 2000 characters

The product description document is created.

**View List of Product Description Documents**

Use the product description page of project properties to view a list of product description documents. The details include the document title, approval status, the date the document was last updated, the date the product description was submitted, the date the product description was approved, and the number of days the document is in review.

To view the page, open the project, and from the Properties menu, click Product Description.
The following details display on the page:

**Title**
Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

**Limit:** 80 characters

**Approval Status**
Displays the approval status for the document as a stoplight.

**Values:**
- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

**Stoplights:**
- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.

**Last Updated Date**
Displays the date the document was last updated and saved.

**Submitted Date**
Displays the date that the project manager submitted the document for review.

**Approved Date**
Displays the date the document was approved or rejected.

**Days in Review**
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

**Stoplights:**
- Green. The document is in review stage for less than five days.
Yellow. The document is in review stage for five or more days, but less than ten days.

Red. The document is in review stage for greater than ten days.

**Edit Product Description Documents**

The properties page is the default page that displays when you open this document. The fields on the page are defined in the General section when you first created the document. Additional fields are also displayed that you require completing before you submit the document for approval.

The fields for the other sections of the document are displayed on separate pages, which you can access from the properties menu. You can edit many of the fields displayed on the pages. Some, though, are display only.

**Follow these steps:**

1. Open the project.
   The properties page appears.
2. Open the product description document.
   The product properties page appears.
3. Edit the following fields in the General section, and save:

   **Title**
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
   
   **Limit:** 80 characters

   **ID**
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

   **Prepared By**
   Displays the name of the resource who created the document.
   
   **Limit:** 80 characters

   **Last Updated Date**
   Displays the date the document was last updated and saved.

   **Approval Status**
   Displays the approval status for the document as a stoplight.
Values:
- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

Stoplights:
- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.

Submit for Review
Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

Project Charter Documents
The project charter document records the existing project.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Project Charter Documents

Follow these steps:
1. Open the PMBOK Guide project.
   The properties page appears.
2. Open the Properties menu, and click Product Charter.
   The project charter page appears.
3. Click New.
   The create page appears.

4. Complete the following fields in the General section:
   
   Name
   Defines the name of this project charter. Once you submit the document for review, this field is display only. In management views, the title is the name of the project charter and is the project link. On the project dashboard page, the document name represents the project charter and is a link to the project charter.
   
   **Limit:** 80 characters

   ID
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

5. Complete the following fields in the Overview section:
   
   ■ Synopsis. The synopsis you enter here displays in the Project Status Snapshot report as the Project Description/Synopsis.

   ■ Purpose/Business Need

   ■ Purpose/Business Need Details

   ■ Product Description and Deliverables

   ■ Project Management


6. Complete the following fields in the Assumptions, Constraints and Issues section:

   ■ Assumptions

   ■ Constraints

   ■ Issues


7. Complete the following fields in the Resources section:

   **Personnel Resources**

   Defines the resources that perform the tasks on this project. The resources who are not already on the project as team members are added to the project as team members when this document is approved.
Financial Resources

Defines the financial resources for this project charter.

Important! If you define financial resources but not a detailed budget for the project, then when the reviewer approves this project charter, the project planned cost is populated with the value. If you have not defined the project planned cost start date and planned cost finish dates, the date fields are populated with the project Start Date and Finish Date field values. The Planned Cost, Planned Cost Start, and Planned Cost Finish fields appear on the budget properties page. The Start Date and Finish Date fields appear on the schedule page of properties page.

Other Resources

Defines the other resources for the project charter.

Approach

Defines the approach planned for this project.

8. Complete the following fields in the Communication Plan section:
   - Communication and Reporting
   - Acceptance
   - Change Management
   - Other

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

9. Define the following remaining fields in the Communication Plan section, and save:
   - Attachment(s)
     Specifies the attachments associated with the document.
   - Description of Attachment(s)
     Defines the description of the attachments associated with the document.

The project charter document is created.

View List of Project Charter Documents

Use the project charter page to view a list of project charter documents, including details such as the document title, approval status, the date the document was last updated, the date the charter was submitted, the date the charter was approved, the number of days the document is in review, and the charter's business reason.
To view this page, open the project, and from the Properties menu, click Project Charter.

You can view the following details on the page:

**Title**
- Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
- **Limit:** 80 characters

**Approval Status**
- Displays the approval status for the document as a stoplight.
- **Values:**
  - New. The document is in draft mode and not submitted for approval.
  - Submitted for Review. The document is submitted for approval but not approved.
  - Approved. The document is submitted for approval and approved.
  - Rejected. The document is submitted for approval and rejected.
- **Stoplights:**
  - Grey. The approval status is "New" and not submitted for approval.
  - Yellow. The approval status is "Submitted for Review" but not approved.
  - Green. The approval status is "Approved". The document is submitted for approval and approved.
  - Red. The approval status is "Rejected". The document is submitted for approval and rejected.

**Last Updated Date**
- Displays the date the document was last updated and saved.

**Submitted Date**
- Displays the date that the project manager submitted the document for review.

**Approved Date**
- Displays the date the document was approved or rejected.

**Days in Review**
- Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.
Stoplights:

- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Purpose

Displays the defined purpose or business need for this project. The data for the field is derived from the Purpose/Business Need field on the project charter properties page.

Edit Project Charter Documents

The properties page is the default page that displays when you open this document. The fields on the page are defined in the General section when you first created the document. Additional fields are also displayed that you require completing before you submit the document for approval.

The fields for the other sections of the document are displayed on separate pages, which you can access from the properties menu. You can edit many of the fields displayed on the pages. Some, though, are display only.

Follow these steps:

1. Open the project.
   The properties page appears.
2. Open the project charter document.
   The project charter properties page appears.
3. Edit the following fields in the General section, and save:
   - **Name**
     Defines the name of this project charter. Once you submit the document for review, this field is display only. In management views, the title is the name of the project charter and is the project link. On the project dashboard page, the document name represents the project charter and is a link to the project charter.
     Limit: 80 characters
   - **Designated Project Manager**
     Defines the name of the resource designated as the manager for this project. Click the Browse icon to select a project manager.
     Default: The name of the project manager
Submit for Review

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

Project Scope Statement Documents

The project scope statement records the expectations for the project deliverables and objectives among the stakeholders.


See the *PMI® Compendium of Project Management Practices* for more information.

Create Project Scope Statement Documents

Follow these steps:

1. Open the PMBOK Guide project.
   The properties page appears.

2. Open the Properties menu, and click Project Scope Statement.
   The project scope statement page appears.

3. Click New.
   The create page appears.

4. Complete the following fields in the General section:
   - **Scope Statement Name**
     Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

   - **ID**
     Displays the unique identifier for the document.

     **Limit:** 80 characters

5. Complete the following fields in the Scope Statement Information and Project Objectives sections, and save:
   - **Project Justification**
   - **Product Description**
Project Scope Statement Documents

- Project Deliverables
- Cost Objectives
- Schedule Objectives
- Quality Measures
- Other Objectives

Attachment(s)
Specifies the attachments associated with the document.

Description of Attachment(s)
Defines the description of the attachments associated with the document.

Limits: 2000 characters

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

The project scope statement document is saved.

View List of Project Scope Statement Documents

Use the project scope statement page to view a list of project scope statement documents. Details include the document name, review status, the date the document was last updated, the date the document was submitted, the date the review was completed, and the number of days the document is being reviewed.

To view the page, open the project, and from the Properties menu, click Project Scope Statement.

You can view the following details on the page:

Scope Statement Name
Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

Review Status
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.
Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Last Updated Date
Displays the date the document was last updated and saved.

Submitted Date
Displays the date that the project manager submitted the document for review.

Review Completed Date
Displays the date the review for this document was completed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

**Edit Project Scope Statement Documents**

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

**Follow these steps:**
1. Open the project.
   The project properties appears.
2. Open the project scope statement document.
   The project scope statement properties page appears.
3. View the following fields in the General section:
   **Prepared By**
   Displays the name of the resource who created the document.
   Limit: 80 characters
Scope Management Plan Documents

**Last Updated Date**
Display the date the document was last updated and saved.

**Review Status**
Display the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

**Values:**
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

**Stoplights:**
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

4. Edit the following field in the General section, and save:

**Scope Statement Name**
Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

**Scope Management Plan Documents**
The scope management plan document records how the project management team plans to manage the project scope and handle changes to project scope.


See the *PMI® Compendium of Project Management Practices* for more information.

**Create Scope Management Plan Documents**

**Follow these steps:**
1. Open the PMBOK Guide project.
   The properties page appears.
2. Open the Properties menu, and click Scope Management Plan.
   The scope management plan page appears.
3. Click New.
   The create page appears.

4. Complete the following fields in the General section:
   
   **Scope Management Plan Name**
   Defines the name of this scope management plan document.
   
   **Limit**: 80 characters

   **ID**
   Displays the unique identifier for the document.
   
   **Limit**: 80 characters

5. Complete the following fields in the Plan Information section:
   
   ■ Describe how Project Scope will be managed
   ■ Likelihood of Change (%)
   ■ Frequency of Change
   ■ Scope of Change (%)
   ■ How will scope changes be identified and classified?
   ■ Describe how changes in project scope will be integrated in the project
   ■ Additional Remarks


6. Define the following remaining fields in the Plan Information section, and click Submit:
   
   **Attachment(s)**
   Specifies the attachments associated with the document.

   **Description of Attachment(s)**
   Defines the description of the attachments associated with the document.
   
   **Limits**: 2000 characters

   The scope management plan document is created and saved.
View List of Scope Management Plan Documents

Use the Project Properties: Main - Scope Management Plan page to view a list of scope management plan documents, including details such as the document name and the date the document was last updated.

To view this page, open the project and click Scope Management Plan from the Properties content menu.

You can view the following details on this page:

- **Scope Management Plan Name**
  - Defines the name of this scope management plan document.
  - **Limit:** 80 characters

- **Last Updated Date**
  - Displays the date the document was last updated and saved.

Edit Scope Management Plan Documents

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

**Follow these steps:**

1. Open the project.
   - The properties page appears.
2. Open the scope management plan document.
   - The scope management plan properties page appears.
3. Edit the following field in the General section, and save:
   - **Scope Management Plan Name**
     - Defines the name of this scope management plan document.
     - **Limit:** 80 characters
Quality Management Plan Documents

The quality management plan document records the team methods and policy of quality control and its plans to control quality in the project.

Do not submit quality management plan documents for review.


See the *PMI® Compendium of Project Management Practices* for more information.

Create Quality Management Plan Documents

**Follow these steps:**

1. Open the PMBOK Guide project.
   
   The project properties page appears.

2. Open the Properties menu, and click Quality Management Plan.
   
   The quality management plan properties page appears.

3. Click New.
   
   The create quality management plan page appears.

4. Complete the following fields in the General section:

   **Quality Management Plan Name**
   
   Defines the name of this document.

   **ID**
   
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

5. Complete the following fields in the Project Quality System and Quality Management Plan sections, and save:

   - Organizational Structure
   - Roles and Responsibilities
   - Procedures
   - Processes
   - Resources
   - Quality Control
Quality Management Plan Documents

- Quality Assurance
- Quality Improvement

**Attachment(s)**

Specifies the attachments associated with the document.

**Description of Attachment(s)**

Defines the description of the attachments associated with the document.

**Limits:** 2000 characters

*See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.*

**View List of Quality Management Plan Documents**

Use the quality management plan page of project properties to view a list of quality management plan documents. To view this page, open the project and from the Properties menu, click Quality Management Plan.

You can view the following details on the page:

- **Quality Management Plan Name**
  - Defines the name of this document.

- **Last Updated Date**
  - Displays the date the document was last updated and saved.

**Edit Quality Management Plan Documents**

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

**Follow these steps:**

1. Open the project.
   - The project properties page appears.

2. Open the Quality Management Plan document.
   - The quality management plan properties page appears.

3. View the following fields in the General section:
   - **ID**
     - Displays the unique identifier for the document.
     - **Limit:** 80 characters
Prepared By
Displays the name of the resource who created the document.
Limit: 80 characters

Last Updated Date
Displays the date the document was last updated and saved.

4. Edit the following field in the General section:

Quality Management Plan Name
Defines the name of this document.

5. Edit the remaining fields on the page, and save.

Risk Identification - SWOT Analysis Documents

The risk identification - SWOT analysis document records the project team assessment in terms of strengths, weaknesses, opportunities, and threats.

Risk identification - SWOT analysis documents cannot be submitted for review.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Risk Identification - SWOT Analysis Documents

Follow these steps:

1. Open the PMBOK Guide project.
   The properties page appears.

2. Open the Properties menu, and click Risk Identification - SWOT Analysis.
   The SWOT analysis page appears.

3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   Name
   Defines the name of this document.
   Limit: 80 characters
ID

Displays the unique identifier for the document.

Limit: 80 characters

5. Complete the following fields in the SWOT Analysis Report Information section, and save:
   ■ Project Strengths
   ■ Project Weaknesses
   ■ Project Opportunities
   ■ Project Threats

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

The risk identification - SWOT analysis document is saved.

View List of Risk Identification - SWOT Analysis Documents

Use the SWOT analysis page to view a list of risk identification - SWOT analysis documents. To view the page, open the project, and from the Properties menu, click Risk Identification - SWOT Analysis.

The following details display on the page:

**SWOT Analysis Report**

Defines the name of the document. The value for this field is derived from the Report Name field on the SWOT Analysis properties page.

**Last Updated Date**

Displays the date the document was last updated and saved.

Edit Risk Identification - SWOT Analysis Documents

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

**Follow these steps:**

1. Open the project.

   The properties page appears.

2. Open the Properties menu, and click Risk Identification - SWOT Analysis.

   The SWOT analysis page lists the risk identification - SWOT analysis documents.
3. Click the name of the document.
   The SWOT analysis properties page appears.

4. View and edit the following fields in the General section, and save:
   
   **Report Name**
   Defines the name of this document.
   
   **Limit**: 80 characters

   **ID**
   Displays the unique identifier for the document.
   
   **Limit**: 80 characters

   **Prepared By**
   Displays the name of the resource who created the document.
   
   **Limit**: 80 characters

   **Last Updated Date**
   Displays the date the document was last updated and saved.

**Project Report Documents**

The project report document records the various project statuses, such as scope, schedule, and overall outlook. The report also records plans to address any open issues.


See the *PMI® Compendium of Project Management Practices* for more information.

**Create Project Report Documents**

Create project report documents using the project report page.

**Follow these steps:**

1. Open the PMBOK Guide project.
   The properties page appears.

2. Open the Properties menu, and click Project Report.
   The project report properties page appears.
3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   **Report Name**
   Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

   **ID**
   Displays the unique identifier for the document.
   **Limit:** 80 characters

5. Complete the following fields in the Status of Project Relative to Project Objectives section:

   **Scope Status**
   The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

   **Values:**
   - On Scope. The project is on scope.
   - Off Scope. The project is off scope.

   **Stoplights:**
   - Grey. The project scope status is not defined.
   - Green. The project scope status is "On Scope".
   - Red. The project scope status is "Off Scope".

   **Scope Details**
   Defines the scope details for the document.
   **Limits:** 2000 characters

   **Schedule Status**
   Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:

   - If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.

   - If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.
If a project report exists but not baselined, the days of delay is calculated by using the difference between and the Finish Date field on the schedule page of project properties and the current date, and the value is used.

**Stoplights:**
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

**Schedule Details**
Defines the details of the schedule.

**Limits:** 2000 characters

**Cost Status**
Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

**Values:**
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

**Cost Details**
Defines the cost details.

**Limits:** 2000 characters

**Quality Status**
Specifies the status of the quality for this project plan. Once you submit the document for review, this field displays as a stoplight to represent the project quality.

**Values:**
- Excellent. The overall project quality is excellent.
- Good. The overall project quality is good.
- Fair. The overall project quality is fair.
- Poor. The overall project quality is poor.

**Stoplights:**
- Green. The overall project quality is excellent.
Yellow. The overall project quality is fair.

Red. The overall project quality is poor.

**Quality Details**

Defines the quality details.

**Limits:** 2000 characters

**Project Outlook**

Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

**Values:**

- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

**Stoplights:**

- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

**Project Status Outlook Details**

Defines the details of the project status outlook.

**Limits:** 2000 characters

6. Complete the following fields in the Progress Report section, and save:

- Status of Project Work to Date, Including Progress Reported This Period
- Special Problems or Issues to be Addressed
- Plans For Next Period
- Other Notes and Concerns
- Key Changes
- Estimate
- Issues or Comments


The project report document is saved.
View List of Project Report Documents

You can view a list of project report documents using the project report page of project properties. Details include the document name, the date the document was last updated, review status, review completed date, and the number of days the document is in review.

To view the page, open the project, and from the Properties menu, click Project Report.

You can view the following details on the page:

Report Name
Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

Report Last Updated
Displays the date this project report document was last updated and saved.

Review Status
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Review Completed Date
Displays the date the review for this document was completed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
Yellow. The document is in review stage for five or more days, but less than ten days.

Red. The document is in review stage for greater than ten days.

**Edit Project Report Documents**

The properties page is the default page that displays when you open a document. The fields on this page are defined in the General section when you first created the document. Additional fields also display requiring completion before submitting the document for review.

The fields for the other sections of the document are on separate pages, which you can access from the Properties menu, and edit.


**Follow these steps:**

1. Open the project.
   
The properties page appears.

2. Open the project report document for editing.
   
The project report properties page appears.

3. View the following:

   **ID**
   
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

   **Prepared By**
   
   Displays the name of the resource who created the document.
   
   **Limit:** 80 characters

   **Report Last Updated**
   
   Displays the date this project report document was last updated and saved.

   **Review Status**
   
   Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Baseline Start
Displays the date of starting the project baseline revision, if a baseline on the project exists. The value for this field is based on the Baseline Start field on the baseline revision properties page.

Baseline Finish
Displays the project baseline revision finish date, if a baseline on the project exists. The value for this field is based on the Baseline Finish field on the baseline revision properties page.

Budget Benefit
Displays the project planned benefit amount at the time of saving the project report. The value for this field is based on the Planned Benefit field on the budget page of project properties.

Budget Cost
Displays the project planned cost amount at the time of saving the project report. The value for this field is based on the Planned Cost field on the budget page of project properties.

ROI %
Displays the project planned ROI at the time of saving the project report. The value for this field is based on the Planned ROI field on the budget page of project properties.

Actual Cost
Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

ETC
Displays the estimate to completion at the time of saving the project report.
EAC

Displays the system-calculated value of estimate at completion (EAC), which is the total cost of all actual work completed to date plus the predicted cost finishing the remaining work. Assuming, the project continues at the same cost performance index. EAC uses the following formula:

\[ EAC = AC + [(BAC - EV) / CPI] \]

4. Edit the following fields in the General section, and save:

**Report Name**

Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

---

**Lessons Learned Documents**

The lessons learned document records best practices and recommendations for improvements. The aim is to improve project practices for the rest of the project and for future projects.


See the *PMI® Compendium of Project Management Practices* for more information.

---

**Create Lessons Learned Documents**

**Follow these steps:**

1. Open the project.
   
   The properties page appears.

2. Open the Properties menu, and click Lessons Learned.
   
   The lessons learned properties page appears.

3. Click New.
   
   The create page appears.

4. Complete the following fields in the General section:

**Title**

Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

**Limit:** 80 characters
ID
  Displays the unique identifier for the document.

Limit: 80 characters

5. Complete the following fields in the Report Information section:

Lessons Learned Category
  Defines the category for this document. Once you submit this document for review, this field becomes display only.

Values: Process Change, Framework/Methodology, Organizational Change, Technology Change, Other, and TBD

Specific Project Management Process Being Used
  Defines the specific project management process that you are using for this project. Once you submit the document for review, this field becomes display only.

Limit: 2000 characters

6. Complete the following fields in the Specific Practice, Tool or Technique Being Used section:

- Action Undertaken
- Result of Action Undertaken
- Preferred Result

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

7. Complete the following fields in the Specific Lessons Learned and Recommendations sections:

- Lessons Learned
- What behavior is recommended for the future?
- Where and how can this knowledge be used later in this current project?
- Where and how can this knowledge be used in future projects?
- Reviewers of Lessons Learned
- Communication/Distribution of Lessons Learned
- Communication Details

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

8. Define the following remaining fields in the Recommendations section, and save:

Attachment(s)
  Specifies the attachments associated with the document.
Description of Attachment(s)

Defines the description of the attachments associated with the document.

Limits: 2000 characters

The lessons learned document is created.

View List of Lessons Learned Documents

Use the lessons learned properties page to view a list of lessons learned documents. Details include the document name, the date the document was last updated, the lessons learned category, review status, review completed date, and the number of days the document is in review.

To view this page, open the project, and from the Properties menu, click Lessons Learned.

You can view the following details on the page:

Report

Displays the name of the document. You can click the document name to open the document.

Last Updated Date

Displays the date the document was last updated and saved.

Lessons Learned Category

Defines the category for this document. Once you submit this document for review, this field becomes display only.

Values: Process Change, Framework/Methodology, Organizational Change, Technology Change, Other, and TBD

Review Status

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:

- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.
Stoplights:

- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Edit Lessons Learned Documents

The properties page is the default page that displays when you open a document. The fields on this page are defined in the General section when you first created the document. Additional fields also display requiring completion before submitting the document for review.

The fields for the other sections of the document are on separate pages, which you can access from the Properties menu, and edit.

Follow these steps:

1. Open the project.
   The properties page appears.
2. Open the Lessons Learned document.
   The lessons learned properties page appears.
3. Edit the following fields in the General section, and save:

   Title
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
   **Limit:** 80 characters

   ID
   Displays the unique identifier for the document.
   **Limit:** 80 characters

   Prepared By
   Displays the name of the resource who created the document.
   **Limit:** 80 characters

   Last Updated Date
   Displays the date the document was last updated and saved.
Review Status
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Submit for Review
Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

Project Closure Documents
The project closure document reviews all key customer requirements and records that the customer has accepted the project product and deliverables.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Project Closure Documents

Follow these steps:
1. Open the PMBOK Guide project.
   The properties page appears.
2. Open the Properties menu, and click Project Closure.
   The project closure page appears.
3. Click New.
   The create page appears.
4. Complete the following fields in the General section:

**Name**
Defines the name of this document.

*Limit: 80 characters*

**ID**
Displays the unique identifier for the document.

*Limit: 80 characters*

5. Complete the following fields in the Project Results section:

**Customer Has Accepted All Project Results**
Defines the list of all the project results.

**Accepted by**
Defines the name of the resource who accepted this document.

6. Complete the following fields in the All Other Deliverables section:

**Customer Has Accepted All Other Deliverables**
Defines the list of all the project deliverables.

**Accepted by**
Defines the name of the resource who accepted this document.

7. Complete the following fields in the All Other Project Requirements section:

**Customer Has Accepted All Other Project Requirements**
Defines the list of all the project requirements.

**Accepted by**
Defines the name of the resource who accepted this document.

8. Complete the following fields in the Other section, and save:

- Explain Any Exceptions to the Above
- Documentation for the Above Has Been Filed/ Archived as Follows
- Comments or Remaining Issues

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.
View List of Project Closure Documents

Use the project closure page to view a list of project closure documents. The details include the document name, the date the document was last updated, review status, review completed date, and the number of days the document is in review.

To view this page, open the project, from the Properties menu, and click Project Closure.

You can view the following details on the page:

**Report**
Displays the name of the document. You can click the document name to open the document.

**Last Updated Date**
Displays the date the document was last updated and saved.

**Review Status**
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

**Values**:  
- New. The document is in draft mode and not submitted for review.  
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.  
- Review Completed. The document is submitted for review and is reviewed.

**Stoplights**:  
- Grey. The document not submitted for review.  
- Green. The document is submitted for review and the review is complete.  
- Yellow. The document is submitted for review but not reviewed.

**Review Completed Date**
Displays the date the review for this document was completed.

**Days in Review**
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

**Stoplights**:  
- Green. The document is in review stage for less than five days.
Yellow. The document is in review stage for five or more days, but less than ten days.

Red. The document is in review stage for greater than ten days.

Edit Project Closure Documents

Use the project closure page to view a list of project closure documents.

The properties page is the default page that displays when you open a document. It displays the fields that you defined when you first created the document, as well as additional fields you must complete before you submit the document for review. You can edit many of the fields displayed on this page.

Follow these steps:

1. Open the project.
   The properties page appears.

2. Open the Properties menu, and click Project Closure.
   The project closure properties page appears displaying a list of project closure documents.

3. Click the name of the project closure document for editing.
   The project closure properties page appears.

4. Edit the following fields in the General section:

   Name
   Defines the name of this document.
   Limit: 80 characters

   ID
   Displays the unique identifier for the document.
   Limit: 80 characters

   Checklist Submitted by
   Defines the name of the resource submitting the document.

   Last Updated Date
   Displays the date the document was last updated and saved.

   Review Status
   Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Values:

- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:

- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Submit for Review

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

5. Edit the fields in the remaining sections, and save.
Chapter 5: Management Views

This section contains the following topics:

- Access the Detailed Management Views (see page 81)
- Project Charters (see page 81)
- Project Reports (see page 83)
- Risks, Issues, and Change Requests (see page 86)
- Lessons Learned (see page 91)
- Executive Dashboard (see page 92)

Access the Detailed Management Views

To access a management view, click a management view from the Management Views menu.

Use the views menu to view management and executive summary data of PMBOK Guide project documents. For example, you can view a detailed list of all the project reports to which you have access using the project reports page.

Some details include the project name to which the document is associated, the document name or title, and the statuses for review, quality, and scope. Some of the management views have tabs, which you can click to view document-specific data in portlets on the page.

Project Charters

The project charters page is a management summary view. The page includes data from all the project charter documents for the PMBOK Guide projects to which you have access. Each item in the list represents a project charter document. If a project charter document does not exist, the list is empty. You can click the document title to open the document.

By default, the documents submitted for review display in the list. You can use the Approval Status filter field to see documents that are still in draft.

To view this page, click Project Charters from the Management Views menu.
You can view details from the project charter documents using the following columns displayed on the page:

**Title**

Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

*Limit: 80 characters*

**Project**

Displays the name of the project to which this document is associated. Click the project name to open the project.

**Project Manager**

Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

**Last Updated Date**

Displays the date the document was last updated and saved.

**Approval Date**

Displays the date this document was approved or rejected.

**Approval Status**

Displays the approval status for the document as a stoplight.

*Values:*

- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

*Stoplights:*

- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.
Days in Review

Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:

■ Green. The document is in review stage for less than five days.
■ Yellow. The document is in review stage for five or more days, but less than ten days.
■ Red. The document is in review stage for greater than ten days.

Purpose

Displays the defined purpose or business need for this project. The data for the field is derived from the Purpose/Business Need field on the project charter properties page.

Project Reports

The project reports page is a management summary view that includes details on the project report documents to which you have access. Each item in the list represents a project report document. If no project report documents exist, the list is empty. You can click the report name to open the document.

To view this page, click Project Reports from the Management Views menu.

You can view details from the project report documents using the following columns that display on the page:

Project

Displays the name of the project to which this document is associated. Click the project name to open the project.

Report

Displays the name of the document. You can click the document name to open the document.

Last Updated Date

Displays the date the document was last updated and saved.

Review Status

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Submitted Date
Displays the date that the project manager submitted the document for review.

Scope Status
The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

Values:
- On Scope. The project is on scope.
- Off Scope. The project is off scope.

Stoplights:
- Grey. The project scope status is not defined.
- Green. The project scope status is "On Scope".
- Red. The project scope status is "Off Scope".

Schedule Status
Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:
If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.

If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.

If a project report exists but not baselined, the days of delay is calculated by using the difference between and the Finish Date field on the schedule page of project properties and the current date, and the value is used.

Stoplights:
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

Cost Status
Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

Values:
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

Quality Status
Specifies the status of the quality for this project plan. Once you submit the document for review, this field displays as a stoplight to represent the project quality.

Values:
- Excellent. The overall project quality is excellent.
- Good. The overall project quality is good.
- Fair. The overall project quality is fair.
- Poor. The overall project quality is poor.

Stoplights:
- Green. The overall project quality is excellent.
Risks, Issues, and Change Requests

- Yellow. The overall project quality is fair.
- Red. The overall project quality is poor.

**Project Outlook**

Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

**Values:**

- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

**Stoplights:**

- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

---

**Risks, Issues, and Change Requests**

Managers and executives can use the Risks, Issues and Change Requests view to view data across all PMBOK Guide projects in an organization. Project managers can also use this view to view metrics across all their assigned PMBOK Guide projects.

The risks page is the default page that opens when you click Risks, Issues and Change Requests from the Management Views menu. From this page you can access the following other pages from the dashboard:

- [Project Issues](#) (see page 88)
- [Project Change Requests](#) (see page 90)

---

**Project Risks Portlet**

You can view a detailed summary of all of the risks to which you have access using the project risks portlet. This portlet displays on the risks page.
This page includes the following columns:

**Above Threshold**
Displays a yellow check mark to indicate that the risk score has exceeded the risk threshold. The risk threshold is the acceptable level of risk that can be tolerated without acting out the risk response strategy. The threshold is based on the impact and probability factors. This is a system-level value for all projects that the CA Clarity PPM administrator sets. The value for this field is based on the Impact and Probability fields on the risk properties page.

**Probability**
Displays the probability that the impact occurs in the form of a stoplight. The risk probability is used to calculate the risk exposure.

*Stoplights:*
- Green. The risk has a low probability of occurring.
- Yellow. The risk has a medium probability of occurring.
- Red. The risk has a high probability of occurring.

**Impact**
Displays the effect of the particular risk on the project, determined by the risk effect on the project performance, supportability, cost, and schedule. This risk impact is used to calculate the risk exposure.

*Stoplights:*
- Green. This risk has a low impact on the project.
- Yellow. This risk has a medium impact on the project.
- Red. This risk has a high impact on the project.

**Risk ID**
Displays the unique identifier assigned to the risk for tracking.

**Risk**
Displays the short name for the risk.

**Limit:** 64 characters

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Category**
Displays the risk category assigned to this risk.

*Values:* Objectives, Sponsorship, Funding, Resource Availability, Interdependencies, Technical, Human Interface, Organizational Culture, Supportability, Implementation, and Flexibility.
Risks, Issues, and Change Requests

**Owner**
Displays the resource who manages the risk. This resource is responsible for ensuring that the risk is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, the owner information is carried over to the issue or change request.

**Send Mail**
Opens an email from your default email client addressed to the resource who created the request.

**Target Resolution Date**
Displays the target date of resolving the risk. This date is the same or earlier than the impact date.

**Project Issues Portlet**
You can view a detailed summary of all of the issues to which you have access using the project issues portlet. This portlet displays on the issues page.

This page includes the following columns:

**Schedule**
Displays the schedule status for the project. If a project report document exists, the value for this field is based on the Schedule Status field on the Project Report Properties page. If a project report does not exist, then the value for this field is based on the Baseline Finish Date field on the Baseline Revision Properties page. This field displays as a stoplight to represent the project's schedule status.

**Important!** For the stoplight to display a color, you must first baseline the project.

**Values:**
- On Track. The project schedule status is on schedule (no days late).
- Ahead of Schedule. The project schedule status is earlier than the scheduled completion date.
- Late (<10 days). The project schedule status is less than or equal to 10 days late.
- Late (>10 days). The project schedule status is greater than 10 days late.

**Stoplights:**
- White. The project schedule status is not defined.
- Green. The project is on schedule (no days late).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

**Priority**
Displays the priority level of this issue.
*Values:* Low, Medium, and High

**Issue ID**
Displays the unique identifier assigned to the issue for tracking.

**Issue**
Defines the short name for the issue.
*Limits:* 64 characters

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Category**
Displays the category to which the issue is assigned.
*Values:* Flexibility, Funding, Human Interface, Implementation, Interdependencies, Objectives, Organizational Culture, Resource Availability, Sponsorship, Success Risk, Supportability, or Technical

**Owner**
Displays the name or the resource managing the issue. This resource is responsible for ensuring that the risk is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, for example, the owner information is carried over to the issue or change request.

**Send Mail**
Opens an email from your default email client addressed to the resource who created the request.

**Target Resolution Date**
Displays the target date of resolving the issue. This date is earlier than the impact date.
Project Change Requests Portlet

You can view a detailed summary of all of the change requests to which you have access using the project change requests portlet. The portlet displays on the change requests page.

This page includes the following columns:

- **Priority**
  - Displays the priority level of the change request.
  - **Values:** Low, Medium, and High

- **Change Request ID**
  - Displays the change request unique identifier.

- **Change Request Name**
  - Defines the short name for the change request. In portlets, this field is read only except when it displays in a portlet to edit. If this field is displayed as a link in a portlet, click the name to open the change request properties page.
  - **Limit:** 64 characters
  - See the Basics User Guide for more information.

- **Status**
  - Displays the status for the change request.
  - **Values:** Open, Work in Progress, Closed, and Resolved

- **Project**
  - Displays the project name. You can click the name to open the project properties page.

- **Creator**
  - Displays the name of the resource who created the request.

- **Owner**
  - Displays the name of the resource managing the request. This resource is responsible for ensuring that the request is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, for example, the owner information is carried over to the issue or change request.

- **Send Mail**
  - Opens an email from your default email client addressed to the resource who created the request.

- **Expected Close Date**
  - Specifies the expected date of closing the request.
Lessons Learned

Managers and executives can use the Lessons Learned view to view data for lessons learned documents that have been submitted across all PMBOK Guide projects in their organization. Project managers can also use this view to view metrics across all their assigned PMBOK Guide projects. The projects that display in the list are those to which you have access rights. The list does not include project templates.

To view this detail view, click Lessons Learned from the Management Views menu.

You can view details for submitted documents using the following columns:

**Category Name**
- Displays the category for this lessons learned document.
- **Values:** Process Change, Framework/Methodology, Technology Change, Organizational Change, Other, and TBD.

**Title**
- Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
- **Limit:** 80 characters

**Project**
- Displays the name of the project to which this document is associated. Click the project name to open the project.

**Project Manager**
- Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

**Last Updated Date**
- Displays the date the document was last updated and saved.

**Submitted Date**
- Displays the date that the project manager submitted the document for review.

**Review Status**
- Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Executive Dashboard

Managers and executives can use the Executive Dashboard to view data across all PMBOK Guide projects in an organization. Project managers can also use this dashboard to view metrics across all their assigned PMBOK Guide projects. The list displays the projects you have access to.

By default, the data displayed in the portlets on this page is derived from active projects only. You can view the project data, including inactive project data, by using the filter fields.

The projects status page is the default page that opens when you click Executive Dashboard from the Management Views menu. From this page, you can access the following other pages from the dashboard:
- Project Variance and Performance (see page 36)
- Projects by Phases (see page 97)

Project Status Portlet

Use the Project Status portlet that displays on the projects status page to view PMBOK Guide metrics and status information across all your assigned PMBOK Guide projects. The list displays the projects you have access to.

See the Project Management User Guide for more information.

The following fields are displayed on the portlet:

Project

Displays the name of the project to which this document is associated. Click the project name to open the project.
Project Phase

Displays the project phase for this project. In management views, the phase displays in a bar graph. The shaded area indicates the phase for the project. You can roll your cursor over the bar to view the phase status, the progress, and the total number of phases for that project. The value for this field is based on the Phase field on the project properties page.

Project Manager

Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

Actual Start

Displays the date of starting the project. The value for this field is based on the Start Date field on the schedule page of project properties.

Actual End

Displays the date of completing the project. The value for this field is based on the Finish Date field on the schedule page of project properties.

Baseline Start

Displays the date of starting the project baseline revision, if a baseline on the project exists. The value for this field is based on the Baseline Start field on the baseline revision properties page.

Baseline End

Displays the date of completing the project baseline revision, if a baseline on the project exists. The value for the field is based on the Baseline Finish field on the baseline revision properties page.

Risk Status

Displays a stoplight to represent the project status level with risks. The value for the field is based on the highest probability of open risks entered on the risks page.

Stoplights:

- Grey. The project has no risk data.
- Green. All of the project risks are of low priority.
- Yellow. The project has at least one risk of medium priority and no high priority risks.
- Red. The project has at least one risk of high priority.
Executive Dashboard

**Issue Status**

Displays the project status level with issues in the form of a stoplight to represent the status. The value for this field is based on the Status field on the issue properties page.

**Default:** Open

**Stoplights:**

- Grey. The project has no issue data.
- Green. All of the project issues are of low priority.
- Yellow. At least one of the project issues is of medium priority and no high priority issues exist for the project.
- Red. At least one of the project issues is of high priority.

**Change Requests Status**

Displays a check mark if at least one change request is logged for the project. You can mouse over the check mark to display the number of change requests created in the rollover text.

**Scope Status**

The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

**Values:**

- On Scope. The project is on scope.
- Off Scope. The project is off scope.

**Stoplights:**

- Grey. The project scope status is not defined.
- Green. The project scope status is "On Scope".
- Red. The project scope status is "Off Scope".

**Schedule Status**

Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:

- If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.
- If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.
If a project report exists but not baselined, the days of delay is calculated by using the difference between and the Finish Date field on the schedule page of project properties and the current date, and the value is used.

**Stoplights:**
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

**Cost Status**
Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

**Values:**
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

**Project Outlook**
Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

**Values:**
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

**Stoplights:**
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

**Project Variance and Performance Portlet**
You can view the project variance and performance data of all active PMBOK Guide projects within your organization using the project variance and performance portlet. The list displays the projects you have access to. The portlet displays on the project variance and performance page.
The following fields are displayed on this portlet:

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Project Manager**
Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

**Baseline Start**
Displays the planned date of starting that the project based on the current baseline. The value for this field is derived from the baseline revision properties page.

**Baseline End**
Displays the planned date of completing the project based on the current baseline. The value for the field is derived from the Baseline Finish field on the baseline revision properties page.

**EAC**
Displays the system-calculated value of estimate at completion (EAC), which is the total cost of all actual work completed to date plus the predicted cost finishing the remaining work, based on the following formula:

\[ EAC = AC + ETC \]

**BAC**
Displays the total planned value for the project, which is also known as the Planned Value (PV). The Budget at Completion (BAC) is the authorized budget assigned to the work yet to start for a project or work breakdown structure component. This value is system-calculated.

**Actual Cost**
Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

**Planned Value**
Displays the planned value (PV) is a system-calculated value representing the Budgeted Cost of Scheduled Work (BCWS). PV is the authorized budget assigned to the project work not started, or a work breakdown structure component. The total planned value for the project is also known as Budget At Completion (BAC).

PV is calculated based on the following formula:

\[ PV = \text{Sum of BAC through a point in time} \]
Earned Value
Displays the earned value (EV) is system-calculated and represents the Budgeted Cost of Work Performed (BCWP). EV is the value indicated in the approved budget for project work performed, or work breakdown structure component.

EV is calculated using the following formula:
\[
\text{Earned Value (EV)} = \text{Budget At Completion (BAC)} \times \% \text{ Complete}
\]

Cost Variance
Displays the cost variance (CV), which is the value of work accomplished against the amount spent to date.

CV is calculated using the following formula:
\[
\text{Cost Variance (CV)} = \text{Earned Value (EV)} - \text{Actual Cost (AC)}
\]

Schedule Performance Index
Displays the system-calculated value of the schedule performance index (SPI). The value represents the ratio of work performed to work scheduled.

SPI is based on the following formula:
\[
\text{Schedule Performance Index (SPI)} = \frac{\text{Earned Value}}{\text{Planned Value}}
\]

Note: A value less than one indicates the work is behind schedule.

Cost Performance Index
Displays the system-calculated value of Cost Performance Index (CPI), which is an efficiency rating for work accomplished.

CPI is based on the following formula:
\[
\text{Cost Performance Index (CPI)} = \frac{\text{Earned Value}}{\text{Actual Costs}}
\]

Note: A value greater than one indicates the costs are running over budget.

Projects by Phases Portlet
The project by phases portlet displays a bar chart of those projects to which you have access. The portlet displays on the project by phases page of executive dashboard. The portlet is designed for senior executives or senior users to view phase data across all PMBOK Guide projects in their organization and to which they have access. The list only includes projects and not project templates.

The bar displays the project count in each phase. You can roll your cursor over a bar to display the percentage of PMBOK Guide projects that are at a particular phase. The percentage is based on the following calculation:

\[
\text{The number of PMBOK Guide projects per phase} = \frac{\text{The number of PMBOK Guide projects}}{\text{The number of PMBOK Guide projects}}
\]
The default phase type displayed in Standard. You can use the filter to view projects in phases for different phase types.

The following field is displayed on this portlet:

**Project Phase**

The phase for this project. This metric is used in portfolio management analysis.

**Values for Standard Phase Type:** Requirements, Design, Build, Test, and Launch
Appendix A: Reports

This section contains the following topics:

Project Report (see page 99)
Project Status Snapshot (see page 100)

Project Report

Description

The Project Report is a Crystal report that provides a summary of the progress to date and the overall project situation. The report contains sufficient information to let project stakeholders decide about what to do next with the project given the information reported. The financial information displayed on the report is from the latest project report. This allows you to view past project reports complete with their historical financial information. When used with project status review meetings, the reports provide essential means to maintain levels of communication among project stakeholders.

Parameters

Project OBS

Indicates the OBS unit to filter the report. Click the Browse icon and select the OBS unit from the list that appears.

Project(s)

Indicates the project data to include in the report. Click the Browse icon and select the projects from the list that appears.

Status

Indicates the review status of the project report documents to include in the report. You can select multiple statuses.

Values: New, Submitted for Review, and Review Completed

Project Manager

Specifies the name of the project manager to filter.

From Date

Defines the date from which to filter this report. To select a specific day, select the Specific Date option and enter a date in the text field in the mm/dd/yyyy format. Or, click the Select Date icon to select a day from the calendar that displays. To select a relative date such as Start of Next Month, select the Relative Date option and select the relative date that applies.
To Date

Defines the date to which to filter this report. To select a specific day, select the Specific Date option and enter a date in the text field in the mm/dd/yyyy format. Or, click the Select Date icon to select a day from the calendar that displays. To select a relative date such as Start of Next Month, select the Relative Date option and select the relative date that applies from the drop-down.

Report Fields

Fields in this report are similar to the fields in the project report document, such as scope status, schedule status, and cost status.

Project Status Snapshot

Description

The Project Status Snapshot report is a Crystal report that allows project managers to evaluate a project in terms of up-to-date schedule and budgeted cost variance on the phase or task level. This report displays the start date, finish date, percent complete, EAC, BAC, EV, PV, AC, CV, Schedule Performance Index (SPI), and Cost Performance Index (CPI).

Members of the following access groups have access to the report:

- PBK Project Manager
- PBK Executive

Parameters

Project(s)

Indicates the project data to be included in the report. Click the Browse icon and select the projects from the list that appears.

Project Manager

Specifies the name of the project manager to filter.

Level of Detail

Specifies the level of detail to see on the report. Select the level from the drop-down.

Project OBS

Indicates the OBS unit to filter this report. Click the Browse icon and select the OBS unit from the list that appears.
Report Fields

Fields in the report are derived from the latest submitted project report. The project description/synopsis is extracted from the last submitted project charter. Other report fields are the same as the fields in the management views, such as actual cost, earned value, and cost variance.
Appendix B: Access Rights

This section contains the following topics:

- **PBK Administrator Group Access Rights** (see page 103)
- **PBK Project Manager Group Access Rights** (see page 135)
- **PBK Team Member Group Access Rights** (see page 153)
- **PBK Executive Group Access Rights** (see page 156)

**PBK Administrator Group Access Rights**

Members of this group are granted PMBOK Guide Accelerator-specific access rights and the CA Clarity PPM access rights.

**PMBOK Guide Accelerator Access Rights**

The following PMBOK Guide Accelerator-specific access rights are included with this group:

- **Lessons Learned - Create**
  
  Allows the resource to create lessons learned documents. This includes the page navigation right.
  
  **Type**: Global

- **Lessons Learned - Edit All**
  
  Allows the resource to edit all lessons learned documents. This includes the page navigation right.
  
  **Type**: Global

- **Lessons Learned - View All**
  
  Allows resource to view all lessons learned documents. This includes the page navigation right.
  
  **Type**: Global

- **Lessons Learned - XOG Access**
  
  Allows the user to import and export lessons learned data using the XML Open Gateway interface.
  
  **Type**: Global
Product Description - Create

Allows the resource to create product description documents. This includes the page navigation right.

Type: Global

Product Description - Edit All

Allows the user to edit all product description documents.

Type: Global

Product Description - View All

Allows the user to view all product description documents.

Type: Global

Product Description - XOG Access

Allows the user to import and export product description documents using the XML Open Gateway interface.

Type: Global

Project - Create - Lessons Learned

Allows the resource to create lessons learned documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Lessons Learned

Allows the resource to create lessons learned documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Product Description

Allows the resource to create product description documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Project Charter

Allows the resource to create project charter documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - Create - Project Closure
Allows the resource to create project closure documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Project Report
Allows the resource to create project report documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Project Scope Statement
Allows the resource to create project scope statement documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Quality Management Plan
Allows the resource to create quality management plan documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Risk Identification - SWOT Analysis
Allows the resource to create risk identification - SWOT analysis documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Create - Scope Management Plan
Allows the resource to create scope management plan documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
PBK Administrator Group Access Rights

**Project - Edit All - Lessons Learned**
Allows the resource to edit all lessons learned documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*

**Project - Edit All - Product Description**
 Allows the resource to edit all product description documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*

**Project - Edit All - Project Charter**
 Allows the resource to edit all project charter documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*

**Project - Edit All - Project Closure**
 Allows the resource to edit all project closure documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*

**Project - Edit All - Project Report**
 Allows the resource to edit all project report documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*

**Project - Edit All - Project Scope Statement**
 Allows the resource to edit all project scope statement documents within a specific project.
*Type: Instance*
*Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template*
Project - Edit All - Quality Management Plan

Allows the resource to edit all quality management plan documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit All - Risk Identification - SWOT Analysis

Allows the resource to edit all risk identification - SWOT analysis documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit All - Scope Management Plan

Allows the resource to edit all scope management plan documents within a specific project master object.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - Edit

Allows the resource to edit a specific project using secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - Edit All

Allows the user to edit all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

**Type:** Global

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View

Allows the resource to navigate to a specific project using secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

**Type:** Instance
Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View
All

Allows the user to view all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

Type: Global

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - Edit

Allows the resource to edit a specific project using secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - Edit All

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Global

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - View

Allows the resource to navigate to a specific project using secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - View All

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Global

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - Edit

Allows the resource to edit a specific project using secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - Edit All

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Global

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - View

Allows the resource to navigate to a specific project using secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - View All

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Global

Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - Edit

Allows the resource to edit a specific project using secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - Edit All

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

Type: Global

Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - View

Allows the resource to navigate to a specific project using secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - View All

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

Type: Global
Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - Edit

Allows the resource to edit a specific project using secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - Edit All

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Global

Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View

Allows the resource to navigate to a specific project using secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View All

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Global

Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - Edit

Allows the resource to edit a specific project using secured subpage Project scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - Edit All

Allows the user to edit all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

**Type:** Global
Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt) - View

Allows the resource to navigate to a specific project using secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt) - View All

Allows the user to view all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt).

**Type:** Global

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - Edit

Allows the resource to edit a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - Edit All

Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

**Type:** Global

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View

Allows the resource to navigate to a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View All

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

**Type:** Global
Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - Edit

Allows the resource to edit a specific project using secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - Edit All

Allows the user to edit all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Global

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View

Allows the resource to navigate to a specific project using secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View All

Allows the user to view all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Global

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - Edit

Allows the resource to edit a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - Edit All

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global
Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View

Allows the resource to navigate to a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View All

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global

Project - View All - Lessons Learned

Allows the resource to view all lessons learned documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Product Description

Allows the resource to view all product description documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Charter

Allows the resource to view all project charter documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Closure

Allows the resource to view all project closure documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
**Project - View All - Project Report**

Allows the resource to view all project report documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View All - Project Scope Statement**

Allows the resource to view all project scope statement documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View All - Quality Management Plan**

Allows the resource to view all quality management plan documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View All - Risk Identification - SWOT Analysis**

Allows the resource to view all risk identification - SWOT analysis documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View All - Scope Management Plan**

Allows the resource to view all scope management plan documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project Charter - Create**

Allows the resource to create project charter documents. This includes the page navigation right.

**Type:** Global
Project Charter - Edit All
Allows the resource to edit all project charter documents. This includes the page navigation right.
Type: Global

Project Charter - View All
Allows resource to view all project charter documents. This includes the page navigation right.
Type: Global

Project Charter - XOG Access
Allows the user to import and export project charter documents using the XML Open Gateway interface.
Type: Global

Project Closure - Create
Allows the resource to create project closure documents. This includes the page navigation right.
Type: Global

Project Closure - Edit All
Allows the resource to edit all project closure documents.
Type: Global

Project Closure - View All
Allows resource to view all project closure documents. This includes the page navigation right.
Type: Global

Project Closure - XOG Access
Allows the user to import and export project closure documents using the XML Open Gateway interface.
Type: Global

Project Conversion – Create
Allows the resource to create project conversion objects. This includes the page navigation right.
Type: Global

Project Conversion – Edit All
Allows the resource to edit all project conversion objects. This includes the page navigation right.
Type: Global
PBK Administrator Group Access Rights

Project Conversion – Navigate
Allows the resource to navigate to project conversion pages.

Type: Global

Project Conversion – Subpage General (ID: pbk_prjconvertProperties) - Edit All
Allows the resource to edit all project conversion objects using secured subpage General (ID: pbk_prjconvertProperties).

Type: Global

Project Conversion – Subpage General (ID: pbk_prjconvertProperties) - View All
Allows the resource to view all project conversion objects using secured subpage General (ID: pbk_prjconvertProperties).

Type: Global

Project Conversion – View All
Allows the resource to view all project conversion objects. This includes the page navigation right.

Type: Global

Project Conversion - XOG Access
Allows the resource to import and export project conversion instances using the XML Open Gateway interface.

Type: Global

Project Report - Create
Allows the resource to create project reports. This includes the page navigation right.

Type: Global

Project Report - Edit All
Allows the resource to edit all project report documents.

Type: Global

Project Report - View All
Allows the user to view all project report documents.

Type: Global

Project Report - XOG Access
Allows the user to import and export project reports using the XML Open Gateway interface.

Type: Global
Project Scope Statement - Create

Allows the resource to create project scope statements. This includes the page navigation right.

Type: Global

Project Scope Statement - Edit All

Allows the resource to edit all project scope statements. This includes the page navigation right.

Type: Global

Project Scope Statement - View All

Allows the user to view all project scope statement documents.

Type: Global

Project Scope Statement - XOG Access

Allows the user to import and export project scope statements using the XML Open Gateway interface.

Type: Global

Quality Management Plan - Create

Allows the resource to create quality management plan documents. This includes the page navigation right.

Type: Global

Quality Management Plan - Edit All

Allows the resource to edit all quality management plan documents. This includes the page navigation right.

Type: Global

Quality Management Plan - View All

Allows the user to view all quality management plan documents.

Type: Global

Quality Management Plan - XOG Access

Allows the user to import and export quality management plan documents using the XML Open Gateway interface.

Type: Global

Risk Identification - SWOT Analysis - Create

Allows the resource to create risk identification - SWOT analysis documents. This includes the page navigation right.

Type: Global
PBK Administrator Group Access Rights

Risk Identification - SWOT Analysis - Edit All
Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.
Type: Global

Risk Identification - SWOT Analysis - View All
Allows the user to view all risk identification - SWOT analysis documents.
Type: Global

Risk Identification - SWOT Analysis - XOG Access
Allows the user to import and export risk identification - SWOT analysis documents using the XML Open Gateway interface.
Type: Global

Scope Management Plan - Create
Allows the resource to create scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - Edit All
Allows the user to edit all scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - View All
Allows resource to view all scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - XOG Access
Allows the user to import and export scope management plan documents using the XML Open Gateway interface.
Type: Global

CA Clarity PPM Access Rights

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

Administration - Access
Allows the user to access the Administration menu.
Type: Global
Audit Trail - View - All

Allows users to view any audit page.

Type: Global

Custom Objects Editor

Allows users to edit the definition of a custom object.

Type: Global

Jobs - Access

Allows users access to jobs pages. Additional rights such as the Jobs - Run - All right or instance level rights such as the Job - Run right, Job - View Output right, or Job - Edit Properties right are required.

Type: Global

Jobs - Run - All

Allows users to run any job. This right also allows users to schedule of any job, edit of job properties for any job and view the output of any job.

Jobs - View Output - All

Allows users to view the output of any job.

Requires: Jobs - Access right

Knowledge Store - View All

Allows resources to view all documents in the knowledge store.

Type: Global

Menu Definition Editor - All

Allows a user to edit and view the definitions of all menu items for the Navigator or Administration menu.

Type: Global

Object - Create Definition

Allows a user to create a custom object.

Type: Global

Object Administration

Allows a user to administer all custom objects.

Type: Global

Object Mapping - XOG Access

Allows the resource to import and export object mapping instances using the XML Open Gateway interface.

Type: Global
Page Definition Editor

Allows users to edit, view, and delete the definition of a specific page.

**Required:** Administration - Studio access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

Page Definition Editor - All

Allows users to edit, view, and delete the definition of all pages.

**Required:** Administration - Studio access right to access the CA Clarity Studio menu.

**Type:** Global

Page Definition Viewer

Allows the user to view the definition of a specific page.

**Required:** Administration - Studio access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

Page Viewer - All

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the Administration - Access right.

**Type:** Global

Page - View

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

**Type:** Instance

Portlet Definition Editor

Allows the user to edit and view the definition of a specific portlet.

Requires: Administration - Studio to access the Studio menu.

Type: Instance


Portlet Definition Editor - All

Allows a user to edit and view the definitions of all portlets available from Studio.

Requires: Administration - Studio to access the Studio menu.

Type: Global

Portlet Viewer - All

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

Type: Global

Portlet - View

Allows users to view a specific portlet.

Type: Instance


Process - Cancel

Allows users to cancel process instances from a specific process definition.

Type: Instance

PBK Administrator Group Access Rights

Process - Cancel - All

Allows users to cancel all process instances.

Type: Global

Process - Create Definition

Allows users or OBS unit to create or change processes for any object type to which they have access. Users with this right can modify, copy, or start any process they create. Users can create processes from the Processes page of an object or from the Data Administration, Processes menu.

Type: Instance

Process - Delete

Allows users to delete process instances from a specific process definition.

Type: Instance


Process - Delete - All

Allows users to delete a process instance from any process definition.

Type: Global

Process - Edit Definition

Allows users to edit a specific process definition, but cannot start any process instances.

Type: Instance


Process - Edit Definition - All

Allows users to edit all process definitions. Typically, this right is given to administrators and senior executives. Users with this right cannot start processes.

Type: Global

Process - Manage

Allows users to start automatically a process instance for the process definition to which they have access. Users can also start a new process instance, delete a process instance, or cancel a process instance.

Type: Instance

Process - Manage - All

Allows users to start automatically any process. This right is typically given to administrators and senior executives. Users with this right can change processes they create and start processes for objects to which they have access. This access right also allows users to start a new process instance, delete a process instance, or cancel a process instance.

**Type:** Global

Process - Start

Allows users to start a new process instance from a specific process definition.

**Type:** Instance


Process - Start - All

Allows users to start (that is, initiate) of all process instances.

**Type:** Global

Process - View Definition

Allows users or an OBS unit to view the process definition from the objects to which they have access. Users with this right cannot start processes.

**Type:** Instance


Process - View Definition - All

Allows users to view all process definitions. Typically, this right is administrators and senior executives. Users with this right cannot start processes.

**Type:** Global

Process View Instance - All

Allows users to view all process instances.

**Type:** Global

Project - Approve

Allows users to approve a specific project.

**Includes:** Project - Edit right to edit the project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
**Project - Approve - All**

Allows users to approve all projects.

*Includes:* Project - Edit - *All* right to edit all projects.

*Type:* Global

**Project - Attach Requisition Entry Resources**

Allows a resource to attach resources to requisition entries. Only users with this access right can change project statuses to "Proposed" and "Booked". This right includes the Project – View Requisitions access right, and the right to navigate to the requisition pages.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Benefit Plan - Edit**

Allows the resource to edit the benefit plans of a specific project.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Benefit Plan - View**

Allows the resource to view the benefit plans of a specific project.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Billing Access**

Allows a resource to access a specific billing project.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Billing Approval**

Allows the resource to approve a specific billing project.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
**Project - Budget Plan - Approve**

Allows the resource to approve the budget plans for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Budget Plan - Edit**

Allows the resource to view the budget plans for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Budget Plan - View**

Allows the resource to view the budget plans for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Budget Plan - View All**

Allows the resource to view all project budget plans.

**Type:** Global

**Project - Cost Plan - Edit**

Allows the resource to edit the cost plans for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Cost Plan - Edit All**

Allows the resource to edit cost plans for all projects.

**Type:** Global

**Project - Cost Plan - View**

Allows the resource to view the cost plans for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Cost Plan - View All**

Allows the resource to view cost plans for all projects.

**Type:** Global
**Project - Create**

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

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

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Create/Edit Requisitions**

Allows the resource to create and edit requisition properties. This right includes the right to navigate to the requisition pages, but not to create or edit the entries within the requisitions.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Delete**

Allows users to delete a specific project.

**Requires:** Project - View to view the project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Delete - All**

Allows users to delete any project.

**Requires:** Project - View to view the project.

**Type:** Global

**Project - Edit**

Allows the user to edit all parts of a project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Edit Access Rights**

Allows users to manage access rights for all projects.

**Requires:** Project - Edit Management right to manage access rights for all projects.

**Type:** Global
Project - Edit Assigned Releases

Allows the resource to edit assigned releases for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit Assigned Tasks

Allows the user to edit assigned tasks on a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit Assigned Tasks - All

Allows the user to edit assigned tasks on all projects.

**Type:** Global

Project - Edit Chargebacks Information

Allows the resource to edit chargeback rules for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit Chargebacks Information All

Allows the resource to edit chargeback rules for all projects.

**Type:** Global

Project - Enable Financial

Enable financial properties for Projects.

**Requires:**

- Project - View
- Project - View Management or Project - Manager

**Type:** Global

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit Financial - All

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

**Type:** Global
Project - Edit Management
Allows users to edit general and management properties, to add staff, create tasks, and create and manage processes for the specific project. This right includes the ability to add subprojects and to edit the project in a project scheduler, such as Microsoft Project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Edit Management - All
Allows the user to edit general and management properties for all projects. This right allows you to add staff and create tasks if projects are enabled for management. This right also includes the right to add subprojects to the project and edit the project in a project scheduler, such as Microsoft Project.

Type: Global

Project - Edit Project Plan
Allows users to add unplanned tasks to a specific project when completing their timesheets when they are a team member on the project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Financial Plan - Submit for Approval
Allows users to submit the financial plans for approval for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Hierarchy - Financial Rollup - Add
Allows the resource to add investments to the financial rollup hierarchy for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Hierarchy - Financial Rollup - Edit
Allows the resource to edit the financial rollup hierarchy for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - Hierarchy - Financial Rollup - View

Allows the resource to view the financial rollup for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Hierarchy - Financial Rollup - View - All

Allows the resource to view the financial rollup for all projects.

**Type:** Global

Project - Hierarchy - Parents - Add

Allows the resource to add investments to the parent hierarchy for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Hierarchy - Parents - Edit

Allows the resource to edit investments in the parent hierarchy for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Modify Baseline

Allows users to edit the baseline for a specific project. This right also allows users to edit the project general properties and processes.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Reverse Charges

Allows the resource to reverse charges for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Reverse Charges - All

Allows the user to reverse charges for any project.

**Type:** Global
Project - Risk, Issue, Change Request - Delete - All
Allows you to delete risks, issues, and change requests for all projects.
Type: Global
this access right is changing in v13. waiting for more info from Bill

Project - Risk, Issue, Change Request - Create/Edit
Allows users to create and edit risks, issues, and changes for a specific project.
Type: Instance
Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Risk, Issue, Change Request - Delete
Allows users to delete risks, issues, and changes for a specific project on which they are a staff member.
Type: Instance
Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Risk, Issue, Change Request - Edit - All
Allows you to create and edit risks, issues, and change requests for any project.
Type: Global
this access right is changing in v13. waiting for more info from Bill

Project - Risk, Issue, Change Request - View
Allows users to view all risks, issues, and change requests for a specific project.
Type: Global
Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Risk, Issue, Change Request - View - All
Lets you view all risks, issues, and change requests for a specific project.
Type: Global

Project - View
Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.
Type: Instance
Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - View Access Rights

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the Project - View access right to the project. From Administration, users must also have the Resource - Edit Administration right.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All Fields

Allows users to view all the general properties and custom defined fields for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Assigned Releases

Allows the resource to view assigned releases for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Chargebacks Information

Allows the resource to view chargeback rules for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Chargebacks Information All

Allows the resource to view chargeback rules for all projects.

Type: Global

Project - View Documents

Allows user to view documents or folders even if user is not a project participant, as long as the documents or folders are marked open to non-participants. This right includes the Project - View Base access right.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
PBK Administrator Group Access Rights

Project - View Financial
Allows users to view the general and financial properties for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Financial - All
Allows users to view the general and financial properties, and processes on all projects. This right does not include the Project - Budget Plan - View All access right.

Type: Global

Project - View Management
Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Management - All
Allows users to view management properties and processes on any project that has been enabled for management.

Type: Global

Project - View Requisitions
Allows the user to view requisitions and the requisition resources.

Type: Global

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Tasks
Allows the user to view all tasks for a specific project. This access right is dependent on the resource having the Project - View Base access right.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Tasks - All
Allows the user to view tasks and work breakdown structure for any project the user has been granted access.

Type: Global
Reports - Access

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

Type: Global

Report - Run

Allows users to run specific reports, edit properties and review output.

Requires: Reports - Access right

Type: Instance

Report Instances: Project Report and Project Status Snapshot

Reports - Run - All

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

Type: Global

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Type: Global

Reports and Jobs - Administrator Access

Allows users to view report and job definitions. With this right, users can also view reports and jobs categories.

Type: Global

Reports and Jobs - Create Definition

Allows users to create, edit, and view report or job definitions.

Requires: Report and Jobs - Administrator Access right

Type: Global

Reports and Jobs - Edit Definition

Allows users to view and change reports and job definitions.

Requires: Reports and Jobs - Administrator right

Type: Instance

Report Instances: Project Report and Project Status Snapshot
Reports and Jobs - Edit Definition - All

Allows users to edit any report or job definition.

Requires: Report and Jobs - Administrator Access right

Type: Global

Resource - Edit - All

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

Requires: Resource - Navigate right

Type: Global

Resource - External Access

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

Type: Global

Resource - Navigate

Allows users to access resource management pages.

Type: Global

Resource - Soft Book - All

Allows users to soft book any resource for investments to which they have view or edit rights.

Type: Global

Resource - View - All

Allows users to view information, except the financial properties of all resources.

Type: Global

Resource - View Book - All

Allows users to view bookings for all resources.

Type: Global

Resource - View Financial - All

Allows users to view financial properties for all resources.

Required: Resource - Navigate right

Type: Global
Timesheets - Approve All
  Allows users to approve all submitted timesheets.
  Type: Global

Timesheets - Edit All
  Allows users to edit all timesheets.
  Type: Global

Timesheets - Navigate
  Allows you to navigate to timesheet pages.
  Type: Global

PBK Project Manager Group Access Rights

Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights

The following PMBOK Guide Accelerator-specific access rights are included with this group:

Lessons Learned - Create
  Allows the resource to create lessons learned documents. This includes the page navigation right.
  Type: Global

Lessons Learned - Edit All
  Allows the resource to edit all lessons learned documents. This includes the page navigation right.
  Type: Global

Lessons Learned - View All
  Allows resource to view all lessons learned documents. This includes the page navigation right.
  Type: Global
Lessons Learned - XOG Access
   Allows the user to import and export lessons learned data using the XML Open Gateway interface.
   Type: Global

Product Description - Create
   Allows the resource to create product description documents. This includes the page navigation right.
   Type: Global

Product Description - Edit All
   Allows the user to edit all product description documents.
   Type: Global

Product Description - View All
   Allows the user to view all product description documents.
   Type: Global

Product Description - XOG Access
   Allows the user to import and export product description documents using the XML Open Gateway interface.
   Type: Global

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - Edit All
   Allows the user to edit all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).
   Type: Global

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View
   Allows the resource to navigate to a specific project using secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).
   Type: Instance
   Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View All
   Allows the user to view all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).
   Type: Global
PBK Project Manager Group Access Rights

Appendix B: Access Rights

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - Edit All

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Global

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - View

Allows the resource to navigate to a specific project using secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - View All

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Global

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - Edit All

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Global

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - View

Allows the resource to navigate to a specific project using secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - View All

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Global
**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - Edit All**

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - View**

Allows the resource to navigate to a specific project using secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - Edit All**

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View**

Allows the resource to navigate to a specific project using secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - Edit All**

Allows the user to edit all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

**Type:** Global
**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - View**

- Allows the resource to navigate to a specific project using secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

  **Type:** Instance

  **Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - View All**

- Allows the user to view all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

  **Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - Edit All**

- Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

  **Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View**

- Allows the resource to navigate to a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

  **Type:** Instance

  **Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View All**

- Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

  **Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - Edit All**

- Allows the user to edit all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

  **Type:** Global
Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View

Allows the resource to navigate to a specific project using secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View All

Allows the user to view all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Global

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - Edit All

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View

Allows the resource to navigate to a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View All

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global

Project - View All - Lessons Learned

Allows the resource to view all lessons learned documents within a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - View All - Product Description

Allows the resource to view all product description documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Charter

Allows the resource to view all project charter documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Closure

Allows the resource to view all project closure documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Report

Allows the resource to view all project report documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Project Scope Statement

Allows the resource to view all project scope statement documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Quality Management Plan

 Allows the resource to view all quality management plan documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - View All - Risk Identification - SWOT Analysis

Allows the resource to view all risk identification - SWOT analysis documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View All - Scope Management Plan

Allows the resource to view all scope management plan documents within a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project Charter - Create

Allows the resource to create project charter documents. This includes the page navigation right.

**Type:** Global

Project Charter - Edit All

Allows the resource to edit all project charter documents. This includes the page navigation right.

**Type:** Global

Project Charter - View All

Allows resource to view all project charter documents. This includes the page navigation right.

**Type:** Global

Project Charter - XOG Access

Allows the user to import and export project charter documents using the XML Open Gateway interface.

**Type:** Global

Project Closure - Create

Allows the resource to create project closure documents. This includes the page navigation right.

**Type:** Global

Project Closure - Edit All

Allows the resource to edit all project closure documents.

**Type:** Global
Project Closure - View All

Allows resource to view all project closure documents. This includes the page navigation right.

Type: Global

Project Closure - XOG Access

Allows the user to import and export project closure documents using the XML Open Gateway interface.

Type: Global

Project Report - Create

Allows the resource to create project reports. This includes the page navigation right.

Type: Global

Project Report - Edit All

Allows the resource to edit all project report documents.

Type: Global

Project Report - View All

Allows the user to view all project report documents.

Type: Global

Project Report - XOG Access

Allows the user to import and export project reports using the XML Open Gateway interface.

Type: Global

Project Scope Statement - Create

Allows the resource to create project scope statements. This includes the page navigation right.

Type: Global

Project Scope Statement - Edit All

Allows the resource to edit all project scope statements. This includes the page navigation right.

Type: Global

Project Scope Statement - View All

Allows the user to view all project scope statement documents.

Type: Global
Project Scope Statement - XOG Access
Allows the user to import and export project scope statements using the XML Open Gateway interface.
Type: Global

Quality Management Plan - Create
Allows the resource to create quality management plan documents. This includes the page navigation right.
Type: Global

Quality Management Plan - Edit All
Allows the resource to edit all quality management plan documents. This includes the page navigation right.
Type: Global

Quality Management Plan - View All
Allows the user to view all quality management plan documents.
Type: Global

Quality Management Plan - XOG Access
Allows the user to import and export quality management plan documents using the XML Open Gateway interface.
Type: Global

Risk Identification - SWOT Analysis - Create
Allows the resource to create risk identification - SWOT analysis documents. This includes the page navigation right.
Type: Global

Risk Identification - SWOT Analysis - Edit All
Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.
Type: Global

Risk Identification - SWOT Analysis - View All
Allows the user to view all risk identification - SWOT analysis documents.
Type: Global

Risk Identification - SWOT Analysis - XOG Access
Allows the user to import and export risk identification - SWOT analysis documents using the XML Open Gateway interface.
Type: Global
Scope Management Plan - Create
Allows the resource to create scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - Edit All
Allows the user to edit all scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - View All
Allows resource to view all scope management plan documents. This includes the page navigation right.
Type: Global

Scope Management Plan - XOG Access
Allows the user to import and export scope management plan documents using the XML Open Gateway interface.
Type: Global

CA Clarity PPM Access Rights

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

Page Definition Editor
Allows users to edit, view, and delete the definition of a specific page.
Required: Administration - Studio access right to access the CA Clarity Studio menu.
Type: Instance

Page Definition Viewer
Allows the user to view the definition of a specific page.
Required: Administration - Studio access right to access the CA Clarity Studio menu.
Type: Instance
Page - View

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

Type: Instance


Portlet Definition Editor

Allows the user to edit and view the definition of a specific portlet.

Requires: Administration - Studio to access the Studio menu.

Type: Instance


Portlet Viewer - All

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

Type: Global

Portlet - View

Allows users to view a specific portlet.

Type: Instance


Process - Cancel

Allows users to cancel process instances from a specific process definition.

Type: Instance

Process - Start
Allows users to start a new process instance from a specific process definition.

Type: Instance


Process - View Definition
Allows users or an OBS unit to view the process definition from the objects to which they have access. Users with this right cannot start processes.

Type: Instance


Project - Benefit Plan - View
Allows users to view the benefit plans for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Budget Plan - View
Allows users to view the budget plans for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Cost Plan - Edit All
Allows users to edit cost plans for all projects.

Type: Global

Project - Cost Plan - View
Allows users to view the cost plans for a specific project.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - Cost Plan - View All
Allows users to view cost plans for all projects.

Type: Global
**Project - Create**

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

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

*Type:* Global

**Project - Create from Template**

Allows you to create new projects using project templates.

*Type:* Global

**Project - Edit Chargebacks Information All**

Allows the resource to edit chargeback rules for all projects.

*Type:* Global

**Project - Edit Financial - All**

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

*Type:* Global

**Project - Hierarchy - Financial Rollup - View**

Allows the resource to view the financial rollup for a specific project.

*Type:* Instance

*Project Templates:* PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Hierarchy - Financial Rollup - View - All**

Allows the resource to view the financial rollup for all projects.

*Type:* Global

**Project - Reverse Charges - All**

Allows the user to reverse charges for any project.

*Type:* Global

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

*Type:* Global

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and changes requests for any project.

*Type:* Global

this access right is changing in v13. waiting for more info from Bill
**Project - Risk, Issue, Change Request - View**

Allows the resource to view risks, issues, and changes for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Risk, Issue, Change Request - View - All**

Allows the resource to view all risks, issues, and change requests for a project instance.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View Access Rights**

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the **Project - View** access right to the project. From Administration, users must also have the **Resource - Edit Administration** right.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View All Fields**

Allows users to view all the general properties and custom defined fields for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View Assigned Releases**

Allows the resource to view assigned releases for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
**Project - View Chargebacks Information**

Allows the resource to view chargeback rules for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View Chargebacks Information All**

Allows the resource to view chargeback rules for all projects.

**Type:** Global

**Project - View Documents**

Allows user to view documents or folders even if user is not a project participant, as long as the documents or folders are marked open to non-participants. This right includes the **Project - View Base** access right.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View Financial**

Allows the resource to view the general and financial properties for a specific project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the **Project - Budget Plan - View All** access right.

**Type:** Global

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template
Project - View Requisitions

Allows the user to view requisitions and the requisition resources.

Type: Global

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Project - View Tasks

Allows the user to view all tasks for a specific project. This access right is dependent on the resource having the Project - View Base access right.

Type: Instance

Project Templates: PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

Reports - Access

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

Type: Global

Report - Run

Allows users to run specific reports, edit properties and review output.

Requires: Reports - Access right

Type: Instance

Report Instances: Project Report and Project Status Snapshot

Reports - Run - All

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

Type: Global

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Type: Global

Resource - Hard Book - All

Allows users to soft and hard book all resources for investments to which they have view or edit rights.

Type: Global
Resource - Edit - All

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

Requires: Resource - Navigate right

Type: Global

Resource - External Access

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

Type: Global

Resource - Navigate

Allows users to access resource management pages.

Type: Global

Resource - Soft Book - All

Allows users to soft book any resource for investments to which they have view or edit rights.

Type: Global

Resource - View - All

Allows users to view information, except the financial properties of all resources.

Type: Global

Resource - View Book - All

Allows users to view bookings for all resources.

Type: Global

Resource - View Financial - All

Allows users to view financial properties for all resources.

Required: Resource - Navigate right

Type: Global

Timesheets - Approve All

Allows users to approve all submitted timesheets.

Type: Global

Timesheets - Edit All

Allows users to edit all timesheets.

Type: Global
**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

---

**PBK Team Member Group Access Rights**

Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

**PMBOK Guide Accelerator Access Rights**

The following PMBOK Guide Accelerator-specific access rights are included with this group:

**Lessons Learned - View All**

Allows resource to view all lessons learned documents. This includes the page navigation right.

**Type:** Global

**Product Description - View All**

Allows the user to view all product description documents.

**Type:** Global

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View All**

Allows the user to view all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - View All**

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - View All**

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

**Type:** Global
**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

*Type:* Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

*Type:* Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - View All**

Allows the user to view all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

*Type:* Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View All**

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

*Type:* Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View All**

Allows the user to view all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

*Type:* Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View All**

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

*Type:* Global

**Project Charter - View All**

Allows resource to view all project charter documents. This includes the page navigation right.

*Type:* Global

**Project Closure - View All**

Allows resource to view all project closure documents. This includes the page navigation right.

*Type:* Global
Project Report - View All
   Allows the user to view all project report documents.
   Type: Global

Project Scope Statement - View All
   Allows the user to view all project scope statement documents.
   Type: Global

Quality Management Plan - View All
   Allows the user to view all quality management plan documents.
   Type: Global

Risk Identification - SWOT Analysis - View All
   Allows the user to view all risk identification - SWOT analysis documents.
   Type: Global

Scope Management Plan - View All
   Allows resource to view all scope management plan documents. This includes the page navigation right.
   Type: Global

CA Clarity PPM Access Rights

Page - View
   Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.
   Type: Instance
   Page Instances: Dashboard

Portlet - View
   Allows users to view a specific portlet.
   Type: Instance
   Portlet Instances: Project Checklist, Project Status, PMO Dashboard, and Project Document Review Status

Project - View Tasks - All
   Allows the user to view tasks and work breakdown structure for any project the user has been granted access.
   Type: Global
PBK Executive Group Access Rights

Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights

The following PMBOK Guide Accelerator-specific access rights are included with this group:

Lessons Learned - Edit All
- Allows the resource to edit all lessons learned documents. This includes the page navigation right.
- Type: Global

Lessons Learned - View All
- Allows resource to view all lessons learned documents. This includes the page navigation right.
- Type: Global

Product Description - Edit All
- Allows the user to edit all product description documents.
- Type: Global

Product Description - View All
- Allows the user to view all product description documents.
- Type: Global

Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - Edit All
- Allows the user to edit all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).
- Type: Global
Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons) - View All

Allows the user to view all projects using the secured subpage Lessons Learned (ID: projectCreate.subObjList.pbk_lessons).

Type: Global

Project - Subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc) - Edit All

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk_prd_desc).

Type: Global

Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter) - Edit All

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk_prj_charter).

Type: Global

Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr) - Edit All

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk_prj_clsr).

Type: Global

Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - Edit All

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

Type: Global
Project - Subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt) - View All

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk_prj_rpt).

Type: Global

Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - Edit All

Allows the user to edit all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

Type: Global

Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt) - View All

Allows the user to view all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scp_stmt).

Type: Global

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - Edit All

Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

Type: Global

Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan) - View All

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk_qlt_mgmt_plan).

Type: Global

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - Edit All

Allows the user to edit all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Global

Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id) - View All

Allows the user to view all projects using the secured subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk_rsk_id).

Type: Global
Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - Edit All

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global

Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan) - View All

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk_scp_mgmt_plan).

Type: Global

Project Charter - Edit All

Allows the resource to edit all project charter documents. This includes the page navigation right.

Type: Global

Project Charter - View All

Allows resource to view all project charter documents. This includes the page navigation right.

Type: Global

Project Closure - Edit All

Allows the resource to edit all project closure documents.

Type: Global

Project Closure - View All

Allows resource to view all project closure documents. This includes the page navigation right.

Type: Global

Project Report - Edit All

Allows the resource to edit all project report documents.

Type: Global

Project Report - View All

Allows the user to view all project report documents.

Type: Global

Project Scope Statement - Edit All

Allows the resource to edit all project scope statements. This includes the page navigation right.

Type: Global
Project Scope Statement - View All
   Allows the user to view all project scope statement documents.
   Type: Global

Quality Management Plan - Edit All
   Allows the resource to edit all quality management plan documents. This includes the page navigation right.
   Type: Global

Quality Management Plan - View All
   Allows the user to view all quality management plan documents.
   Type: Global

Risk Identification - SWOT Analysis - Edit All
   Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.
   Type: Global

Risk Identification - SWOT Analysis - View All
   Allows the user to view all risk identification - SWOT analysis documents.
   Type: Global

Scope Management Plan - Edit All
   Allows the user to edit all scope management plan documents. This includes the page navigation right.
   Type: Global

Scope Management Plan - View All
   Allows resource to view all scope management plan documents. This includes the page navigation right.
   Type: Global

CA Clarity PPM Access Rights

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

Knowledge Store - View All
   Allows resources to view all documents in the knowledge store.
   Type: Global
Page - View

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

Type: Instance


Page Viewer - All

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the Administration - Access right.

Type: Global

Portlet - View

Allows users to view a specific portlet.

Type: Instance


Portlet Viewer - All

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

Type: Global

Project - Approve - All

Allows users to approve all projects.

Includes: Project - Edit - All right to edit all projects.

Type: Global

Project - Budget Plan - View All

Allows users to view budget plans for all projects.

Type: Global

Project - Cost Plan - View All

Allows users to view cost plans for all projects.

Type: Global
Project - Hierarchy - Financial Rollup - View - All
Allows the resource to view the financial rollup for all projects.
Type: Global

Project - Risk, Issue, Change Request - View - All
Lets you view all risks, issues, and change requests for a specific project.
Type: Global

Project - View Financial - All
Allows users to view the general and financial properties, and processes on all projects. This right does not include the Project - Budget Plan - View All access right.
Type: Global

Project - View Tasks - All
Allows the user to view tasks and work breakdown structure for any project the user has been granted access.
Type: Global

Project - View Management - All
Allows users to view management properties and processes on any project that has been enabled for management.
Type: Global

Reports - Access
Allows users to access reports pages. Additional report rights are also required to view, edit, or run reports.
Type: Global

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

Reports - View Output - All
Allows users to view the output of any report.
Requires: Reports - Access right
Type: Global

Resource - Navigate
Allows users to access resource management pages.
Type: Global
Resource - View - All

Allows users to view information, except the financial properties of all resources.

Type: Global

Resource - View Book - All

Allows users to view bookings for all resources.

Type: Global

Resource - View Financial - All

Allows users to view financial properties for all resources.

Required: Resource - Navigate right

Type: Global