CA Clarity PPM 12.1
Functionality by License User Type
April 6, 2011

1 Introduction

Access to CA Clarity™ PPM functionality is defined by the type of named users. On Premise installations of Clarity have three types of named users: Managers, Team Members, and View Only Users. On Demand installations have the same types of users but they are named differently: Full Functionality, Restricted User, and View Only User. Section 2 describes in detail what each user can and cannot do within Clarity.

- Managers/Full Functionality Users have full use of the functionality in CA Clarity PPM.
- Team Members/Restricted Users have specified, limited use of functionality.
- View Only Users can view information but cannot create or edit information except for Ideas and Incidents.

There is one additional user type for Clarity customers who also own CA Agile Vision.

- Vision Timesheet Users have the right to enter time into Clarity via the Agile Vision/Clarity integration.

All users are named, not concurrent. Only "Active Users" are counted as licensed users. Refer to Section 3 for details.

2 CA Clarity PPM Functionality by User Type

The following table lists key functional capabilities and indicates which types of user are authorized. Use this table to determine whether a user should be a Manager, Team Member or Enterprise Visibility Option viewer.

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
IT Portfolio Management				
IT Portfolio Management includes portfolio management functionality for services, assets and applications.				
Establish a hierarchy of IT services	√			
Group portfolios in hierarchies	√			
View the aggregate labor and cost of child investments for a service	√	√	√	
Create departmental hierarchy to capture department-level work, budgets, cost recovery, portfolio and capacity planning, service descriptions and delivery	√			
View services, view departments, and subscribe to a service	√			
Create multiple portfolios (Applications, Products, Assets and Services)	√			
Create and edit portfolio analysis criteria	√			

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
View portfolio scorecards	√	√	√	
Conduct portfolio analysis	√			
Create and manage portfolio scenarios	√			
Run portfolio scenarios through Capacity Planning	√			
Communicate portfolio decisions through workflow	√			
Create new portfolio fields in Clarity Studio	√			
Create new portfolio portlets in Clarity Studio	√			
IT Financial Management				
Financial Planning				
Set up and view budgets and forecasts using “simple budgets”	√			
Define detailed forecasts using cost plans	√			
Conduct what-if analysis	√			
Chargeback Allocations				
Charge back IT costs per service to subscribers	√			
Define a system of rules used to generate chargebacks, debit transactions and accounting credits	√			
View a customer invoice preview and line item drill down as charges accumulate	√	√	√	
View cost recovery statements contrasting incurred costs with charged back costs for services provided to a given customer	√	√	√	
Allocate costs to ‘overhead’ and chargeback accordingly	√			
Reverse any past chargeback allocations, either partially or in full	√			
Allocate chargebacks to a selected fiscal period or split an allocation over multiple periods	√			
Cost and Rate Management				
Create multiple rate rules by investment, department, project, or client	√			
Mark-up costs by a specified percentage	√			
External Billing and Invoicing				
Create time and materials billing	√			
Create fixed price and retainer billing	√			
Create batch billing	√			

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Consolidate external invoices and create credit memos	√			
Internal Chargeback				
Create internal invoices	√			
Review pro forma invoices	√			
Business Relationship Management (BRM)				
Update the customer and provider portals, and the customer, provider, and service dashboards in Clarity Studio	√			
View all portals, dashboards, and portlets	√	√	√	
Configure the customer and provider portals, and the customer, provider, and service dashboards from the application side	√			
Project Portfolio Management				
Project Portfolio Manager includes portfolio management functionality for projects and programs and other work.				
Create and edit project portfolio analysis criteria	√			
View project portfolio scorecards	√	√	√	
Conduct project portfolio analysis	√			
Create and manage project portfolio scenarios	√			
Run project portfolio scenarios through Capacity Planning	√			
Communicate project portfolio decisions through workflow	√			
Create new project portfolio fields in Clarity Studio	√			
Create new project portfolio portlets in Clarity Studio	√			
Product Portfolio Management				
Product Portfolio Management includes portfolio management functionality for products.				
Create and edit product portfolio analysis criteria	√			
View product portfolio scorecards	√	√	√	
Conduct product portfolio analysis	√			
Create and manage product portfolio scenarios	√			
Run product portfolio scenarios through Capacity Planning	√			
Communicate product portfolio decisions through workflow	√			
Create new product portfolio fields in Clarity Studio	√			

CA Clarity PPM Functionality	**Manager / Full Functionality**	**Team Member / Restricted Functionality**	**View Only User**	**Vision Timesheet User**
Create new product portfolio portlets in Clarity Studio	√			
Requirements Planning				
Create and edit Requirements	√			
Create and edit Release	√			
Create and edit Release Plans	√			
View Requirements, Releases, and Release Plans			√	
Project Management				
Project Management includes planning and management functionality for projects and programs and all time tracking.				
Project Management				
Create project plans	√			
Create project plans from predefined templates	√			
Add tasks or subtasks to existing projects	√			
Add unplanned task to project through timesheet	√			
Access guidelines for projects	√			
Profile a project	√			
Enter time against projects	√	√		√
Approve time sheets	√	√		
Approve all time sheets	√			
View key project status, tasks, milestones, WBS and resources	√	√	√	
Update task status and complete deliverables	√	√		
Create and edit plans in Open Workbench via Schedule Connect	√			
Create and edit plans in Microsoft Project via Schedule Connect	√			
Baseline a project	√			
Create project workflows and processes in Process Manager	√			
Create new project fields in Clarity Studio	√			
Create new project management portlets in Clarity Studio	√			
Capture time on non-project investments	√	√		
Resource Management				
Identify resource roles	√			

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
Search for resources to staff projects	√			
Save searches for resources	√			
Assign resources to projects	√			
Manage resource availability calendars	√	√		
Methodology Authoring				
Create project templates	√			
Utilize project templates to create projects	√			
Develop forms for profiling projects	√			
Create guidelines for competing tasks and deliverables	√			
Program Management				
Create and Manage Programs	√			
View Programs	√	√	√	
Risk, Issue, & Change Management				
Create risks, issues and change requests	√	√		
View risks, issues and change requests	√	√	√	
Promote risks to issues and issues to changes	√			
Budgeting, Forecasting, & Actuals				
Create budgets and forecasts with duration using simple budgets.	√			
Create detailed cost plans by role with the option to populate from staff plan using roles, along with budget approval and revision and benefit plans	√			
Calculate costs for budgets and forecasts using the default rate matrix based on roles	√			
Resource Management				
View resource dashboards and portlets	√	√	√	
View resource reports	√	√	√	
Create new resource fields in Clarity Studio	√			
Create new resource portlets in Clarity Studio	√			
Capacity Planning				
Create and view what-if scenarios	√			
Evaluate capacity vs. demand	√			
Manage resource supply and demand	√			
Skills Management				
Create skills database	√			

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
Manage all resource skills	√			
Manage own skills	√	√		
Find resources by skills	√			
Resource Requisitions				
Create resource requisitions	√			
Fulfill resource requisitions	√			
Create resource requisition processes in Process Manager	√			
Create new resource requisition form fields in Clarity Studio	√			
Project Financial Management				
Project Financial Management				
Define detailed budgets and forecasts using cost plans with any available plan-by types. Set up budget approval and revision. Set up benefit plans.	√			
Track actual project costs	√			
Manage resource costs and rate matrices	√			
Manage Financial Organization Breakdown Structure	√			
Setup multiple currencies and conversions	√			
View project cost accounting reports	√	√	√	
Project Billing & Invoicing				
Bill on demand	√			
Bill in advance	√			
Bill in batch	√			
Approve billing	√			
Re-bill	√			
Issue credit memos	√			
Project Chargeback Allocations				
Create chargeback accounts	√			
Assign chargeback allocation rates	√			
Generate chargebacks	√			
Reverse chargebacks	√			
Maintain and review audit trail	√			
Demand Management				
Idea Creation and Management				
Enter new ideas	√	√	√	

CA Clarity PPM Functionality	**Manager / Full Functionality**	**Team Member / Restricted Functionality**	**View Only User**	**Vision Timesheet User**
View status of submitted ideas	√	√	√	
Set up idea review and approval processes	√			
Create new idea fields in Clarity Studio	√			
Create new idea portlets in Clarity Studio	√			
Convert an idea to a project	√			
Track time against an idea	√	√		
Enter budget for an idea	√	√		
Incident Management				
Enter new incidents	√	√	√	
View status of submitted incidents	√	√	√	
View incident statistics	√	√	√	
Assign incidents to resources	√			
Update incident status	√	√	√	
Record time against incidents	√	√		
Set up incident workflows and processes in Process Manager	√			
Create new incident fields in Clarity Studio	√			
Create new incident portlets in Clarity Studio	√			
Process Management (Workflow & Processes)				
Receive notifications	√	√	√	
Receive and respond to action items – In General	√	√		
Receive and respond to action items – Incidents and Ideas Only	√	√	√	
Create and edit process workflows	√			
Setup and deploy phase-gate processes	√			
View graphical workflow status	√	√	√	
Manage process instances and track metrics	√			
Earned Value Management				
Contract Work Breakdown Structure Management				
Create Contracts and Agencies	√			
Define the CWBS Hierarchy	√			
Create Summary Level Planning Packages	√			
Create Control Accounts	√			
Create Work Packages	√			
Link Work Packages to Projects or Project Tasks	√			

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
Baseline a Contract	√			
Create the CWBS Dictionary	√			
View Contract Pricing costs	√	√	√	
View Contract, CWBS and Control Account Dashboards	√	√	√	
Update Earned Value Totals for Contracts	√	√		
Update Earned Value History for Contracts	√			
Generate CPR Data for Contracts	√			
View CPR Reports (Formats 1-5)	√	√	√	
View CWBS Dictionary report	√	√	√	
View CWBS Index report	√	√	√	
View Responsibility Assignment Matrix report	√	√	√	
Burdening Matrix				
Define Burdening Classes	√			
Define Burdening Matrix with unlimited burdening levels	√			
Define Burden Escalation tables	√			
Associate Burdening Matrix to Project	√			
Clarity Studio (Configuration)				
Add custom fields, manage objects with PowerMods	√			
Create portlets with graphs, tables and html source	√			
Build custom pages and dashboards	√			
Configure menu items	√			
Modify application look and feel	√			
Create and manage local configurations through System Partitions	√			
Build user-defined objects	√			
End users create or edit new custom objects	√			
End users view custom objects	√	√	√	
Integration with Desktop Scheduling Tools				
Access Open Workbench for desktop scheduling	√			
Access Microsoft Project for desktop scheduling	√			
Integration with IT Applications				
Install, configure, and use CA IT integrations (Service Desk, Harvest, UAPM)	√			
Install, configure, and use BMC Remedy integration	√			

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
Collaboration				
Utilize document management	√	√		
Manage events and to-dos in calendars	√	√		
Create threaded discussions topics	√	√		
Participate in threaded discussions	√	√		
Participate in workflows processes	√	√		
Create and edit workflows and processes using Process Manager	√			
Receive and respond to action items	√	√		
Search documents and discussions	√	√		
Receive notifications	√	√	√	
Business Intelligence and Reporting				
Run and view reports	√	√	√	
View and personalize dashboards	√	√	√	
Create custom reports	√			
Best Practice Accelerators				
PMO Accelerator				
Load best-practice content	√			
Enable portlets, dashboards and processes	√			
Modify portlets and dashboards in Clarity Studio	√			
Modify workflows and processes	√			
View portlets and dashboards	√	√		
PRINCE2 Accelerator				
Load best-practice content	√			
Enable portlets, dashboards and processes	√			
Modify portlets and dashboards in Clarity Studio	√			
Modify workflows and processes	√			
View and Edit PRINCE2 sub-objects	√	√		
View PRINCE2 portlets and dashboards	√	√		
CPIC Accelerator				
Create Services and child investments	√	√		
Build Exhibit 300 form	√	√		
Run Exhibit 300 and Exhibit 53 reports	√	√		

CA Clarity PPM Functionality	Manager / Full Functionality	Team Member / Restricted Functionality	View Only User	Vision Timesheet User
Modify reports via the Report Format object and update all custom attributes, processes, portlets and portlet pages in Studio	√			
Creating and Running Integrations				
XML Open Gateway (XOG)				
Run XOG processes	√			
Create, edit and manage GEL scripts	√			
System Administration				
Create and manage Organization Breakdown Structures	√			
Manage users and groups	√			
Manage security and privileges	√			
Setup fiscal and time reporting periods	√			
Setup GL accounts and charge codes	√			
Configure the data mart	√			
Schedule reports and jobs	√			

3 User Statuses

Users are named, non concurrent. Users are counted for license compliance based on their status, as described in the following table:

Status	Description
Active	Active users can log in to CA Clarity PPM and are counted as licensed users.
Locked	Locked users cannot log into CA Clarity PPM and are not counted as licensed users. Locked users are created as resources in the system but not allowed to log in.
Inactive	Inactive users cannot log into CA Clarity PPM and are not counted as licensed users. Inactive users cannot be assigned to projects and cannot log in.

4 Additional Information

For more information please contact your account manager, visit www.myclarity.com or inquire at clarity@ca.com.