

# CA Clarity™ PPM

## New Product Development Product Guide

Service Pack 02.0.01



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# Chapter 1: New Product Development Overview

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This section contains the following topics:

[CA Clarity PPM Accelerator for NPD Capabilities](#) (see page 9)

[Pipeline Management](#) (see page 11)

[Portfolio Management](#) (see page 11)

[Idea-to-Launch Management](#) (see page 12)

[Project and Resource Management](#) (see page 12)

[User Access Groups](#) (see page 12)

## CA Clarity PPM Accelerator for NPD Capabilities

CA Clarity PPM Accelerator for New Product Development (CA Clarity PPM Accelerator for NPD) helps organizations shorten the time-to-market for new products, increase their rate of innovation, increase new product sales, and reduce new product development costs. To achieve the aim, organizations require balancing all product development skills and resources for optimum strategic, financial, and operational impact across all product lines in all product lifecycle phases.

CA Clarity PPM Accelerator for NPD offers the following main capabilities:

- The Portfolio management includes the following features:
  - The ability to track specific product categories.
  - The ability to track the product or product type.
  - The ability to track products by brand, customer segment, and product line
  - The ability to move products through lifecycle phases.
  - A rating system that uses specific factors to provide product analysis.
  - The ability to perform portfolio management of products.
  - The ability to track competitor products.
  - A page layout for portfolios based on product information.
  - A group that provides appropriate access for product managers.

- Pipeline and project management includes the following features:
  - A gate scoring object to track and store all gate scores for each stage that a project goes through.
  - Automated gate submission processes that support each of the Stage-Gate gates.
  - A gate scoring page layout to provide metrics on gates for projects.
  - Custom attributes and page layouts, including status tracking of go, hold, and kill-based on gate scores.
  - Tracking of budget per phase.
  - A built-in project template for the stage-gate five-step process.
  - Support for deliverables and worksheets with a document folder structure.
  - The ability to perform project portfolio management.
  - A group that provides appropriate access for project managers.
  - An Executive Dashboard.
  - A Stage Review Dashboard available for project managers to review projects before submitting them for gate approval.
  - Extra project portlets available to be added to any of the project page layouts.
  - A Portfolio Management Dashboard available for portfolio managers to view everything.
  - A group that provides appropriate access for portfolio managers.
  - A group that provides appropriate access for team members.
- Idea-to-launch management includes the following features:
  - An Idea Vault to collect all ideas and allow portfolio planning.
  - The idea screening process that allows you to score the idea and turn it into a project.
  - Custom attributes and page layouts for ideas.
  - A gate scoring mechanism for gatekeepers to rate ideas against business goals.
  - The ability for non-Clarity users to enter new ideas, access idea scoring, and view pertinent projects.
  - The Idea Management Dashboard that displays necessary metrics and provides quick updates for users.
  - A group that provides appropriate access to marketing managers.

## Pipeline Management

The process of prioritizing and sequencing projects to balance resource demand and capacity is known as project portfolio management or pipeline management. As projects move from one stage in their lifecycle to the next, they require reviewing in the context of all the other in-flight projects, to determine if they are still worth doing. This is a portfolio process of selecting and scheduling.

Advantages of pipeline management include the following:

- Resource conflicts and overloads are avoided, thus reducing project delays
- Scarce resources can be allocated to the highest priority projects
- Pipeline throughput is improved by ensuring the right mix of projects at all phases of development

## Portfolio Management

The purpose of portfolio management is to increase the business value of your product portfolio by accomplishing the following goals:

- Ensure the product portfolio has an acceptable balance of reward against risk
- Improve alignment between innovation and business strategy by top-down allocation of new product development (NPD) resources
- Maximize the value of the product portfolio by monitoring the health and performance of all products over their entire lifecycle

Analyzing a product portfolio provides you with answers to such questions as the following:

- Do we have sufficient products in each stage of development?
- Do we have products in development for all of the markets or strategic arenas in which we compete?
- What are the planned launch dates for each of the products in the portfolio?
- Do we have an appropriate balance of value against risk in the product portfolio?
- Are we over or under spending in any specific product or market area?
- Which products are at risk?
- Where do we have product gaps that we require to fill?
- Do we have sufficient high value products?
- Do we have too many low value products?

## Idea-to-Launch Management

Idea-to-launch is the process of bringing new products from inception through to market. This process requires collaboration and coordination of multiple business functions including R&D, marketing, sales, finance, distribution, and the supply chain.

Employing an idea-to-launch process upholds the following capabilities:

- Support a rigorous go/kill decision process at funding gates
- Have well-defined stages that eliminate missed steps and rework
- Have standard deliverables for effective gate decisions
- Be adaptable to the scope and risk profile of the product being developed

## Project and Resource Management

A key to improved project success is effective project and resource management. CA Clarity PPM Accelerator for NPD offers comprehensive project and resource management capabilities that allow your organization to achieve the following goals:

- Reduce resource bottlenecks by managing all resource allocations and assignments
- Minimize schedule delays by managing all project schedules and progress
- Help reduce project delays by capturing all issues and risks
- Enable early identification of cost overruns by capturing all project planned and actual costs
- Improve quality by providing standard templates for cross-functional project plans
- Reduce project delays by tracking dependencies between product and technology development projects
- Improve cross-functional coordination through program management of cross-functional plans

## User Access Groups

Six CA Clarity PPM Accelerator for NPD user access groups exist, each with a different set of security rights. The groups are defined in the following ways:

- Non-Clarity Users - Users who do not require CA Clarity PPM to perform their jobs, but can enter ideas into the system.
- Team Members - Regular members of CA Clarity PPM Accelerator for NPD project teams.

- Marketing Managers - Users who perform marketing management activities.
- Project Portfolio Managers - Users who manage projects and portfolios of projects.
- Product Portfolio Managers - Users who manage the products, and the portfolios to which the products belong.
- Executives - Company executives who use CA Clarity PPM Accelerator for NPD to view project, product, and portfolio metrics dashboards.

## Non-Clarity Users

Non-Clarity Users are employees who do not use CA Clarity PPM on a daily basis to do their jobs. The access group enables them with permissions defined to show only ideas, gate scoring, and projects, with the [Idea Management Dashboard](#) (see page 70).

## Team Members

Team Members are users who perform a variety of activities as members of NPD project teams.

## Marketing Managers

Marketing Managers are the CA Clarity PPM Accelerator for NPD idea managers—the guardians of the idea review process. It is their responsibility to make the initial decision to send an idea through the scoring or fast track option. They review and submit ideas, utilize the [Idea Management Dashboard](#) (see page 70), enter planned costs and other idea data, and typically manage the overall idea process.

## Project Portfolio Managers

Project Portfolio Managers create project portfolios and oversee projects. The managerial responsibilities cover a wide scope of activities, such as adding team members, creating the cost plan, reviewing planned and actual costs, editing and creating tasks, assigning and allocating resources, potentially approving timesheets, reviewing schedule variances, baselining the project, managing issues and risks, and adding dependencies. Project Portfolio Managers utilize the [Stage Review Dashboard](#) (see page 66) to determine that the project is on track.

## Executives

The executive users use the [Executive Dashboard](#) (see page 47) to analyze portfolios and potentially gate scoring.



# Chapter 2: Install the CA Clarity PPM Accelerator for NPD

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This section contains the following topics:

[How to Install Add-Ins](#) (see page 15)

## 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 15).
2. [Extract the .jar file](#) (see page 16).
3. [Stop the services](#) (see page 17).
4. [Install the add-in](#) (see page 18).
5. [Start the services](#) (see page 18).
6. [Apply the add-in](#) (see page 20).

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

## 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](http://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: Ideation

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This section contains the following topics:

- [Idea Management](#) (see page 23)
- [Create and Submit an Idea for Approval](#) (see page 24)
- [Evaluate an Idea](#) (see page 28)
- [Prepare an Idea for Gate Scoring](#) (see page 29)
- [Score an Idea](#) (see page 29)
- [Fast Track an Idea](#) (see page 31)
- [Kill an Idea](#) (see page 32)
- [The Idea Vault](#) (see page 32)
- [Scheduling Information](#) (see page 32)
- [Budget Information](#) (see page 33)
- [Financial Planning](#) (see page 33)
- [Stage Gate Review](#) (see page 33)

## Idea Management

Ideation refers to the act of developing new ideas. New product development (NPD) begins with the submission of ideas for a company-configured approval process. Input from sales, marketing, customers, partners, and other employees is often spread across the organization in numerous databases, email in-boxes, and documents. Anybody in your organization can create and submit an idea—they do not have to be regular CA Clarity PPM Accelerator for NPD users. CA Clarity PPM Accelerator for NPD has assigned a specific role for these types of users—Non-Clarity Users (see definition on page 13).

For proper resource and budget planning, all the ideas require reviewing and weighing against the company goals. Only then, take decisions regarding the ideas to implement. CA Clarity PPM Accelerator for NPD provides an idea management dashboard designed for the marketing and product managers within your organization. A subset of that dashboard is available for other users as a landing point for them to enter ideas. A variety of portlets track idea metrics, including costs and revenues. CA Clarity PPM Accelerator for NPD also provides an Idea Vault, which is a page that contains all ideas, whether approved or not. Filter the ideas by status and stage to look for older ideas that may be on hold or recycled, and to start the approval process.

**Note:** Much of your work is performed from the Idea Management Dashboard. Therefore, you might find it useful to set the dashboard as your default CA Clarity PPM Accelerator for NPD home page. Action items can be accessed and managed directly from the page.

## Create and Submit an Idea for Approval

Once an idea is submitted for approval, the process manager sends an automatic notification to review it.

**Follow these steps:**

1. Open the New Product Development menu, and click Idea Management Dashboard.  
The overview page appears.
2. In the Ideas section, click New.  
The create page appears.
3. Complete the following required fields in the General section:

**Subject**

Indicates the name of the idea.

**Idea ID**

Indicates a unique identifier for the idea. Enter an alphanumeric string of characters.

**Idea Priority**

Indicates a classification for the issue. Select a category from the drop-down list.

- High
- Low
- Medium

**Description**

(optional) A description of the idea.

**Project Manager**

The user assigned to manage the potential project, once it is created.

**Idea Submitter**

The user who entered the new idea.

**Process Manager**

The user assigned to oversee the idea review process and gate score management.

**Stage**

The default selection is Idea Screen. Click the lookup icon to browse for a company-defined stage for the project (optional). The following are the out-of-the-box NPD lookup values:



**New Product Development (Level = Investment Process)**

- Idea Screen (Level: Investment Stage)
- Scoping (Level: Investment Stage)
- Business Case (Level: Investment Stage)
- Development (Level: Investment Stage)
- Testing and Validation (Level: Investment Stage)
- Launch (Level: Investment Stage)

**Active**

(optional) The box is checked as Active by default.

**Idea Documentation**

(optional) Click the multiselect browse icon to add related files to the idea.

4. Complete the following fields in the Idea Details section (optional). These details are used in many portlets and require filling based on the business configurations. You can customize the lookup tables to include your own values:

**Product Category**

The category is used to label the product with the appropriate description as it relates to marketing. Select a category from the drop-down list.

**New to World (Class: Breakthrough, market changing products)**

These products have the most potential for huge company changing revenues, but they also carry the most risk. The technology to create the product may not exist, and may ultimately not be feasible.

**New to the Company (Class: Company changing)**

These products are not that your company has built, but competitors have built them. The technology exists, but may not exist in-house. These are risky, but not as risky as New to the World products. Since they have the potential for new product lines, they also have great revenue increasing capability.

**Line Extension (Class: Safest)**

Extensions to existing product lines. These products are low risk, low reward projects.

**Modification (Class: Safe)**

Modifications to existing product lines. A new product is developed, but about more of the same. Low risk, low reward, low innovation.

**Enhancement (Class: Safe)**

Minor additions to existing features in products. A new product is developed, but without new features. Low risk, low reward, low innovation.

### **Product Line**

The product line is a set of values that your organization specifies, based on its own manufactured products. The lookup list is populated with out-of-the-box sample values.

### **Product Type**

The type is used to track the product type using the following choices:

- Platform
- Technical Development
- Product

### **Brand**

The product line delineates where the product fits from a manufacturing perspective and the brand name is used for marketing purposes. The attributes are necessary for tracking of product information and are used extensively in the portfolio management dashboard. The lookup list is populated with out-of-the-box sample values.

### **Customer Market**

The geographical region of the customer market.

- AsiaPac
- EMEA
- North America
- South America
- Global

### **Customer Segment**

Describes the part of the new or existing customer base that the product addresses.

- Business
- Consumer

5. Complete the fields in the Estimated Costs and Revenues section (optional).

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

### **Estimate Type**

Defines the type of estimate benefits, cost, and revenue impact for the idea.

### **Currency Code**

Defines the system currency and a read-only field. If multi currency is enabled, a drop-down list of all active currency codes. During the conversion process, the currency code is the currency code for the investment.

**Business Unit**

Defines the business unit associated to the idea.

**Revenue Description**

A brief description of the revenue from the investment.

**Estimated Cost**

Defines the estimated total cost of the idea. During the conversion process, the estimated cost is the investment planned cost.

**Estimated Benefit**

Defines the estimated total financial benefit of the idea both in term of revenue and money saved.

**Estimated Start Date**

Indicates the estimated start date for the idea. The date must be on or before the estimated finish date.

**Estimated Finish Date**

Indicates the estimated finish date for the idea. The date must be on or before the estimated finish date.

**Breakeven Date**

Defines the estimated break-even date for the idea. During the conversion process, the break-even date is the budget break-even date for the investment.

6. Save and submit for approval.

## Idea Screening

Once preliminary research on a submitted idea is complete using the idea approval steps, the process manager decides to implement and develop the idea as a project. Although ultimately responsible for the final decision in the system, the process manager does not make the choice without collaboration. Committee of team members decide, each reviewing the idea and providing counsel as to the feasibility of the idea.

Ideas require passing though the Idea Gate Review page before becoming a real project.

The Idea Gate Review page is tied to a review process that is initiated once the marketing manager submits the idea for gate scoring. An action item is sent to the process manager who acts as the decision maker for idea approval. The choices are Go or Kill.

After an idea is submitted, the process manager reviews it and decides about further investigating. If so, they launch the Idea Gate Review page. The process can involve many teams to estimate or further explore the idea. It culminates in a gate scoring review, where the team decides to proceed with or kill the idea.

This sub process notifies each of the listed gatekeepers on the idea (through action items) that they log in and score the idea against specific factors related to company goals. Once scoring is completed, the process manager makes a final decision to go, kill, or hold the idea. Define the gatekeepers when the idea is first created.

If the idea is moved to a Go status, a project is automatically created for that idea and the gate score is entered into the Idea Gate Review page. The gate score is automatically calculated based on the average of all gatekeeper entries.

All ideas in the "Kill" or "Hold" status are moved into the Idea Vault and can be resurrected at a later date as business goals shift.

## Evaluate an Idea

When an idea is submitted for approval, the process manager receives an action item to evaluate it. After this evaluation, the process manager determines whether the idea warrants further consideration or not.

Depending on your role, view and evaluate the idea from one or more of the NPD dashboards that display action items: the Idea Management Dashboard, the Portfolio Management Dashboard, and the Executive Dashboard.

### Follow these steps:

1. Log in to CA Clarity PPM Accelerator for NPD.  
The overview page appears.  
**Note:** If you change your default home page to a specific dashboard, the specified page appears instead of the overview page.
2. Open the Action Items menu and click the Idea Review action item.  
The action item details page appears.
3. In the Object Links section, click the idea link in the Objects field.  
The properties page appears.
4. Review and evaluate the data. You can add additional details at this time.
5. Save the changes.

After completing the evaluation, it is time for the process manager to either continue the idea along the NPD process or kill it.

You can choose from the following options:

- [Prepare the idea for gate scoring](#) (see page 29)
- [Score the idea](#) (see page 29)

- [Fast track the idea](#) (see page 31)
- [Cancel the idea](#) (see page 32)

## Prepare an Idea for Gate Scoring

1. Open the idea properties page and click Idea Gate Review.  
The idea gate review page appears.
2. Complete the following fields in the Gatekeepers section:

### **Gatekeepers - Gate 1**

The users assigned to provide a gate score to the project. This field is optional if a resource is assigned to the Gatekeepers - All Gates selection.

### **Gatekeepers - All Gates**

The users assigned to provide a gate score to the project. This field is required if more than one gate approval step exists, or if no resources are assigned to the Gatekeepers - Gate 1 selection. The gatekeepers are carried over to the project and remain gatekeepers during later stages in the process.

3. Save the changes.  
The filter page appears.
4. Open the New Product Development menu, and click Idea Management Dashboard.
5. Click on the action item in the My Action Items section.
6. Select Go from the Status drop-down list.
7. Save the changes.

Your action item closes and the idea is now listed in the Idea Gate Review section of the overview page of idea management dashboard. The status is Running. Additionally, creates a Gate Score action item for the gatekeepers assigned to the project.

## Score an Idea

To score an idea, rate a series of factors. Each factor is assigned a number and the average is used to calculate your score and the average gate score from all gatekeepers. The values and lookups attached to these factors can be customized to suit your company needs and policies. Once you submit the scores, they cannot be edited.

Once you begin scoring, you can save to see the stoplight icon calculations assigned to each selected value.

- Green (best)
- Blue
- Yellow
- Red (worst)

Additionally, the average score displays in the Gate Score field.

**Follow these steps:**

1. Open the Executive Dashboard, or the Portfolio Management Dashboard.
2. In the Gate Review portlet, locate the project, and click the corresponding Properties icon.

The properties page appears.

3. Complete the following fields in the Gate Factors section:

**Strategic Fit and Importance**

- Not Aligned
- Somewhat
- Supports
- Aligns Very Well

**Product & Competitive Advantage**

- Limited
- Modest
- Positive
- Significant

**Market Attractiveness**

- Small
- Modest
- Significant
- Large

**Reward to Company**

- Poor Reward
- Modest
- Good
- Excellent

**Synergies - Leverage Core Competencies**

- No Opportunity
- Some Opportunity
- Considerable Opportunity
- Excellent Opportunity

**Technical Feasibility**

- Not Feasible
- Limited Feasibility
- Good Likelihood of Feasibility
- Excellent Feasibility

4. Save the changes. You can leave the gate scoring process and return to it at another time. The scores are saved, allowing you to change them, or continue scoring the remaining factors.
5. Select the Scoring Complete check box.
6. Submit the changes.

## Fast Track an Idea

You can evaluate an idea and set it to expedite through the NPD process. You can skip the gate scoring steps and convert it to a project immediately.

**Follow these steps:**

1. Complete steps 1 through 4 of the [evaluation process](#) (see page 28).
2. In the General section, select the Fast Track check box.
3. Save the changes.  
The properties page appears.
4. Open the New Product Development menu, and click Idea Management Dashboard.

5. Click on the action item in the My Action Items section.
6. Select Go from the Status drop-down list.
7. Save the changes.

Your action item closes and the idea is now listed in the Idea Processes section of the overview page of idea management dashboard. The Stage is set to Idea Screen and the idea is converted to a project.

## Kill an Idea

1. Complete steps 1 through 4 of the [evaluation process](#) (see page 28).
2. Click Cancel.
3. Open the New Product Development menu, and click Idea Management Dashboard.
4. Click on the action item in the My Action Items section.
5. Select Kill from the Status drop-down list.
6. Save the changes.

Your action item closes and the idea is now listed in the Idea Processes section of the overview page of idea management dashboard. The status is Done. The idea also appears in the [Idea Vault](#) (see page 32) with a Kill gate decision for future resubmission for approval.

## The Idea Vault

The Idea Vault page displays all of the ideas entered into CA Clarity PPM Accelerator for NPDP, such as the ideas converted into projects.

For further details on the page, refer to [Idea Vault](#) (see page 70).

## Scheduling Information

Use the schedule page of idea properties to define the idea start and finish dates, to open it for time entry, and to define its charge code.

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

After defining the scheduling information, [enter the budget information](#) (see page 33).



## Budget Information

The idea budget data is essential in managing and analyzing idea portfolios. Correctly defining and recording the idea planned cost and benefit information is key to accurately assessing and analyzing ideas during portfolio management.

Budget information is defined using the budget page of idea properties.

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

## Financial Planning

The project budget is awarded incrementally. As each stage of the project is completed, the team gains approval to commence to the next stage. This approval involves obtaining the requested budget dollars. CA Clarity PPM Accelerator for NPD uses cost plans and creates a detail row with the information entered on the gate information page once the project receives approval to move on to the next gate.

This means, a cost plan exist for each project with multiple detail rows: one for each stage. Reporting can be for the current stage or for the entire project, depending on the view. All the existing views and portlets continue to use the cumulative totals for planned costs and actuals, with the planned cost increasing with each stage that the project enters.

The project manager distributes the budget amount across the fiscal time periods, based on when the project uses the monies.

A Create Cost Plan action item is automatically sent to the project manager on submitting an idea for the final gate approval.

## Stage Gate Review

The Stage Gate Review portlet is a graph that displays all the projects in the portfolio as bubbles based on the stage and cost of the project. The portlet provides you with a visual of where to focus resources and budget, and what to be planning for as projects move towards the launch stage.

The legend lists each of the following attributes with the colors:

### **X-Axis**

Projects Grouped by Stage - each section of the graph represents one of the five stages for a project.

**Y-Axis**

Planned Cost - The total planned cost from a project.

**Bubble Color**

The bubble color represents the gate decision.

- Gold = Green
- Red = Kill
- Yellow = Hold
- Blue = Recycle

**Bubble Size**

Gate Score.

**Background Color**

A list of the stages with their colors and the placement on the X-axis.

- Scoping is first (2-3)
- Business Case is second (3-4)
- Development is third (4-5)
- Test and Validate is fourth (5-6)
- Launch is fifth (6-7)

The following portlet filters are available:

**Gate Decision**

Select a gate decision from the drop-down list (Go, Kill, Hold, Recycle, All).

# Chapter 4: Managing the Project Pipeline

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The NPD Project Master Portfolio supports the NPD metrics for projects. The Portfolio Management Dashboard includes portlets to assist with future project planning and reviewing of costs and revenues.

For further details on the dashboard, refer to [Portfolio Management Dashboard](#) (see page 56).

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

This section contains the following topics:

[Automatic Project Creation](#) (see page 35)

[NPD Gate Process](#) (see page 36)

[Document Folder Structure](#) (see page 37)

[NPD Cost Plans](#) (see page 38)

## Automatic Project Creation

Once you provide idea gate approval, CA Clarity PPM Accelerator for NPD automatically performs the following actions:

- Converts the idea to a fully configured project plan that adds the following capabilities to the project:
  - A folder structure for documents
  - The work breakdown schedule (WBS) consisting of five automated stages and gates
  - Gate review
  - Product alignment
- All the fields on the idea having corresponding fields on the project are copied.
- The project process can be running.
- The first two stages of the NPD investment process (Idea Capture and Scoping) are marked as complete.

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

## Project Stages

Stages are defined as phases in CA Clarity PPM Accelerator for NPD. Stages are where the following activities occur:

- Work is done. Activities are completed to advance the project to the next gate.
- Cross-functional teams collaborate. For example, no R&D or marketing stage exists. Activities are worked in parallel to accelerate the process.
- Risk is managed. Vital information is gathered to manage risk. For example, technical, market, financial, or operations.
- Incremental budgeting is managed. Each stage costs more than the preceding one resulting in incremental commitments. As uncertainties decrease, expenditures are allowed to rise and risk is managed.
- The process manager reviews the project plan, deliverables, financials, and issues in preparation for the gate review team analysis. This process is formalized in CA Clarity PPM Accelerator for NPD as the Stage Review.

For further details on the Stage Review portlet, refer to [Stage Review](#) (see page 66).

## Gates

Gates are defined as milestones in CA Clarity PPM Accelerator for NPD. Gates are where the following activities occur:

- Go/Kill and prioritization decisions are made.
- Mediocre projects are culled out and resources are allocated to the best projects.
- Focus is placed on three key issues: quality of execution; business rationale; and the quality of the action plan.
- Gatekeepers use scorecards and criteria to evaluate the project potential for success. The process is formalized in CA Clarity PPM Accelerator for NPD as the gate review.

## NPD Gate Process

Once a stage is complete, you are ready for the gate.

The standard gate process has 5 stages:

- Scoping
- Business Case

- Development
- Testing and Validation
- Launch

The high-level WBS structure is as follows:

Stage (Phase)	Gate (Milestone)
Idea Capture	Go to Scoping
Scoping	Go to Business Case
Business Case	Go to Development
Development	Go to Testing and Validation
Testing and Validation	Go to Launch
Launch	Post Launch Review

CA Clarity PPM Accelerator for NPD includes one built-in project template to support the five stages.

## Document Folder Structure

For each gate, create and review specific documents. CA Clarity PPM Accelerator for NPD includes a pre-configured set of folders in the project document manager. The folders are stored on the project and available to team members.

- General Project Administration
  - Correspondence
  - Meeting Notes
  - Preliminary Specifications
  - Project Reviews
  - Technical Reports
- Stage 1 - Scoping\*
  - Deliverables
  - Gate Information
  - Worksheets
- Stage 2 - Business Case
- Stage 3 - Development

- Stage 4 - Test and Validate
- Stage 5 - Launch

\*Each of the five stage folders have the sub-folders listed under Scoping.

## NPD Cost Plans

Once the project receives approval to move on to the next gate, CA Clarity PPM Accelerator for NPD uses cost plans and creates a detail row with the information entered on the budget page.

**Note:** When you create the cost plan, include User Value 2 as one of items in the plan and provide a default value. In addition, provide default values for all items you include in the plan. Enter the default values in the NPD Gate Processing section of the cost plan properties.

Once the final gate approval is submitted, the project manager receives an action item to create the cost plan, marks the Create Cost Plan action item as Done. CA Clarity PPM Accelerator for NPD automatically then creates a scoping detail row and uses the budget information from the idea for the scoping change over the fiscal time periods that comprise that stage.

Once the cost plan is in place, as the project moves through the stages, CA Clarity PPM Accelerator for NPD automatically assigns a detail row for the next stage. This also includes a budget amount displayed in the first time period. The project manager distributes the budget amount across the fiscal time periods based on when the project uses the monies.

This means, one cost plan exists for every project with multiple detail rows: one for each stage. Reporting can be for the current stage or for the entire project, depending on the view. All existing views and portlets will continue to use the cumulative totals for planned costs and actuals, with the planned cost increasing with each stage that the project enters. CA Clarity PPM Accelerator for NPD supplies out-of-the-box defined codes for the detail rows.

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

# Chapter 5: Managing the NPD Product Portfolio

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The NPD Product Master Portfolio supports the NPD metrics for products. The Portfolio Products Dashboard includes portlets to assist with future project planning and reviewing of costs and revenues.

For further details on this dashboard, refer to [Product Master Portfolio Page Layout](#) (see page 78).

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

This section contains the following topics:

[NPD Products](#) (see page 39)

[Product Specific Attributes](#) (see page 40)

[Product Analysis](#) (see page 41)

[Competitor Product Tracking](#) (see page 43)

## NPD Products

CA Clarity PPM Accelerator for NPD products include pertinent attributes related to marketing and the launching of your products. The attributes simplifies tracking your products based on how they are built and launched.

Products pass through five stages:

- Development
- Introduction
- Growth
- Maturity
- Decline

Cost and revenues are tracked using existing CA Clarity PPM functionality. Product managers can track groups of products according to product line and brand, and can be built with the portfolio power filter.

The [Product Master Portfolio Page Layout](#) (see page 78) provides a number of comparison portlets that allow you to compare your current plan of record with different scenarios. Competitor information can be tracked for products and used to create competitor portfolios for use in product planning.

## Product Specific Attributes

Once a project is nearing completion (or even during the creation process), a new product is created in CA Clarity PPM. Depending on your organization, you can track portfolios of products based on several factors. Ensure a balance between value and risk and understand how many products fall into each category.

You can build portfolios using different attributes such as brand or product line, based on existing CA Clarity PPM functionality for power filters. The following attributes are necessary for tracking of product information and are used extensively in the product portfolio dashboards.

CA Clarity PPM Accelerator for NPD includes the following product attributes:

### **Product Categories**

Used to label the product with the appropriate description as it relates to marketing.

#### **Values:**

- New to World
- New to Company
- Line Extension
- Modification

### **Product Type**

Used to track the product type:

- Platform
- Technical Development
- Product

### **Customer Segment**

Defines the part of the customer base or of new customers this product address.

#### **Values:**

- Business
- Consumer



**Product Line**

Defines the set of values that your organization specifies based on your manufactured products.

**Values:**

- Gadgets
- Other
- Widgets
- Wingdings

**Brand**

Defines where the product line delineates and the product fits from a manufacturing perspective, the brand name is used for marketing purposes. CA Clarity PPM Accelerator for NPD includes a user-defined lookup to store company brand names.

## Product Analysis

CA Clarity PPM Accelerator for NPD provides a set of factors to help you determine four key marketing tenets:

- Market Attractiveness
- Competitive Position
- Technical Capability
- Customer Value Perception

These four areas are scored using a simple stoplight calculation. Each of the values are linked to a specific number which drives a green, yellow, or red stoplight display.

The product properties page includes Product Analysis that provides a section for each of the four market areas. To view the product properties page, click Products in the Portfolio Management menu. Select the product to view and click product analysis.

To rate Market Attractiveness, the following questions are available:

- Market Growth Projections
  - High Growth
  - Moderate Growth
  - Low Growth

- Product Price Protection
  - High Price Protection
  - Downward Moderate Price Trend
  - Significant Downward Price Pressure
- Product Extension Leverage
  - Significant Opportunity for Product Extensions
  - Moderate Opportunity for Product Extensions
  - Limited Extension Capability

To rate Competitive Position, the following questions are available:

- Competitive Position
  - Dominant Position
  - Top Tier Position
  - Market Trailing Position
- Competitive Trend
  - Competition Declining
  - Competition Stable
  - Competition Increasing

To rate Technical Capability, the following questions are available:

- Technical Synergy
  - Known Technology with Expertise In-House
  - Known Technology with Expertise Available
  - Unknown Technology
- Technical Delivery
  - Existing Delivery Environment In-House
  - Existing Delivery Environment Available
  - Delivery Environment Unavailable

To rate Customer Value Perception, the following questions are available:

- Customer Price Perception
  - Premium Price
  - Premium Price at Risk of Commodity Pricing
  - Commodity Pricing

- Product Perceived Value
  - New Perceived Benefit
  - New Usage of Product
  - No Change from Existing Products

## Competitor Product Tracking

To get a complete picture of the market landscape, track your competition. Gather information about competitive products and store that to use for comparison against your own products and product plans. CA Clarity PPM Accelerator for NPD allows you to input your competitors and track their products.

The Product Properties page has a checkbox that indicates that the product is a competitor product. The flag is used in all portlets and reports to differentiate between competitor and company-owned products.

To view the Product Properties page, click Products in the Portfolio Management menu, and select the product to view.



# Chapter 6: Dashboards and Portlets

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This section contains the following topics:

[Gate Scoring](#) (see page 45)

[Executive Dashboard](#) (see page 47)

[Portfolio Management Dashboard](#) (see page 56)

[Idea Management Dashboard Overview](#) (see page 63)

[Stage Review](#) (see page 66)

[Portfolio Master Page Layouts](#) (see page 78)

## Gate Scoring

The Gate Scoring dashboard is built for product managers and marketing managers to view the gate scores for all ideas and projects in one location.

## Gate Scoring List

The Gate Scoring List is a snapshot portlet designed to show metrics for projects or ideas.

The following columns are displayed on this portlet:

### **Gatekeeper**

Defines the name of the gatekeeper. Click the name to open the resource properties page.

### **Properties Icon**

Click the icon to view the gate scoring properties page.

### **Project or Idea**

Defines the name of the idea or project. Click the name to open the idea or project properties page.

### **Stage**

Defines the current stage of the idea or project.

### **Score Date**

Defines the date when the gate score was completed.

### **Gate Score**

Defines the stoplight icon and gate score number (from the project or idea gate score field).

**Potential Market Gain**

The standard stoplight.

- Green = Large
- Blue = Significant
- Yellow = Modest
- Red = Small

**Product & Competitive Advantage**

- Limited
- Modest
- Positive
- Significant

**Reward to Company**

- Poor Reward
- Modest
- Good
- Excellent

**Strategic Fit and Importance**

- Not Aligned
- Somewhat
- Supports
- Aligns Very Well

**Synergies - Leverage Core Competencies**

- No Opportunity
- Some Opportunity
- Considerable Opportunity
- Excellent Opportunity

**Technical Feasibility**

- Not Feasible
- Limited Feasibility
- Good Likelihood of Feasibility
- Excellent Feasibility

**Market Attractiveness**

- Small
- Modest
- Significant
- Large

The following portlet filters are available:

**Gatekeeper(s)**

Click the browse icon to filter by resources assigned as gatekeepers.

**Gate Score**

Enter a range to filter by the gate score.

**Project or Idea**

Click the browse icon to filter by project or idea.

**Stage**

Click the browse icon to filter by stage.

## Executive Dashboard

The Executive Dashboard is built for individuals having a view across all projects, products, and their respective portfolios. The dashboard has five tabs, each containing portlets for R & D, Launch, and Brand tracking. The Roadmap page is a critical page, which shows the stage of products in their product lifecycle for executives to plan for the future.

### Executive Dashboard Overview

The Overview page contains three portlets that provide general information for an executive.

- Gate Review
- Project Update
- My Action Items

To view the portlets, click Executive Dashboard in the New Product Development menu. The overview page displays.

## Gate Review

The Gate Review portlet shows all the submitted ideas and active projects currently moving through the gating process. For ideas, this process is the idea screen process before an idea is converted to a project. For projects, the gating process runs throughout the life of the project. As each gating milestone is completed, the project goes through a gate review for approval to move on to the next stage. The Gate Review portlet provides you with insight into the number of ideas and projects going through approval processes.

The following columns are displayed on the portlet:

### **Gatekeeper**

The name of the gatekeeper. Click on the name to drill down to the resource properties page.

### **Properties Icon**

Click on the icon to view the gate scoring properties page.

### **Project or Idea**

The name of the idea or project. Click the name to drill down to the idea or project properties page.

### **Stage**

The current stage of the idea or project.

### **Score Date**

The date when the gate score was completed.

### **Gate Score**

The stoplight icon and gate score number (from the project or idea gate score field).

The following portlet filters are available:

### **Gatekeeper**

Click the browse icon to filter by resources assigned as gatekeepers.

### **Investment**

Click the browse icon to filter by investment.

## Project Update

The Project Update portlet lets you filter to display a specific set of projects. The portlet shows the main metrics about gate scores, decisions, and cost and revenue information. By default, the portlet is sorted with red flag projects at the top.



The following columns are displayed on the portlet:

**Project**

The name of the project. Click on the name to drill down to the project properties page.

**Properties icon**

Click on the icon to drill down to the project hierarchy page.

**Gate Score**

The stoplight icon and gate score number (from the project or idea gate score field).

**Gate Decision**

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill

**Red Flag**

The red flag Boolean on the project.

**Stage**

The current stage of the project.

**Customer Market**

The customer market selection on the project.

**Product Category**

The selected product category on the project.

**Ranking**

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

**Planned Revenue**

Total planned revenue for the project.

**Planned Cost**

Total planned cost for the project.

**Actual Cost**

Total actual cost for the project.

**Remaining Cost**

The difference between actual cost and planned cost.

**Planned NPV**

NPV percentage from the project.

**Planned ROI**

ROI percentage from the project.

The following portlet filters are available:

**Product Category**

Select a category from the drop-down list.

**Product Line**

Select a product line from the drop-down list.

**Gate Decision**

Select a gate decision from the drop-down list.

**Brand**

Select a product brand from the drop-down list.

**Customer Market**

Select a customer market from the drop-down list.

**Customer Segment**

Select a customer market from the drop-down list.

**My Action Items**

My Action Items portlet displays all the notifications and scheduled action items that a marketing, process, or product manager receives.

The following columns are displayed on the portlet:

**Action Item**

The name of the action item. Click on the action item to drill down to the action item details page.

**Priority**

Based on high, medium, or low priority with corresponding red, yellow, or green stoplights.

**Status**

Displays the status.

**Values:** Open, Closed, Deferred, Done, and In Progress

**Date Received**

The date that the action item is assigned to the user.

**Process Icon**

Click on the icon to drill down to the process diagram page.

The following portlet filter is available:

**Status**

Select an action item status from the drop-down list.

## Brand Dashboard

The Brand Dashboard page contains three portlets that provide general information for executive or senior managers.

- Brand Portfolios
- Portfolio Revenue and Cost per Year
- Product Line Rating

## Brand Portfolios

The Brand Portfolios portlet is designed to select only the portfolios with the Brand Portfolio checkbox selected. The portlet allows portfolio analysts to view specific product brands and their overall costs and revenues. From an executive standpoint, it shows the brands that are performing well.

The following columns are displayed on the portlet:

**Brand**

Displays the portfolio name. Click on the name to drill down to the portfolio scorecard page.

**Product Category**

The product category from the portfolio.

**Planned Cost**

The total planned cost of the portfolio.

**Planned Benefit**

The total planned benefit of the portfolio.

**Variance**

The difference of cost subtracted from benefit.

## Portfolio Revenue and Cost per Year

The Portfolio Revenue and Cost per Year portlet is a stacked column portlet that displays costs and revenues per portfolio. The portlet allows you to select a collection of portfolios to compare numbers across them. This portlet uses a yearly time measurement, so all monetary amounts for the portfolio is based on the year selected. You can also select all years and get the view from the beginning of tracking this data in CA Clarity PPM Accelerator for NPD.

Costs and revenues must be entered on each project in the portfolio for this portlet to display data. Each stacked column contains a blue and red portion for revenue and cost respectively.

- The red column indicates Cost per Year
- The blue column indicates Revenue per Year
- The Y-Axis displays Dollars/Money
- The X-Axis displays project names

The following portlet filters are available:

### Portfolio

Click the multi-select browse icon to pick one or more projects for display in the portlet.

### Year

Select a year from the drop-down list. Select All to view all the portfolios.

## Product Line Rating

The Product Line Rating portlet helps to determine how each product area is doing. The bubble chart displays the aggregate of all the products based on their category. The chart compares the metrics for the competition rating on the X-axis and the Product Potential Gain on the Y-axis.

The legend lists each of the following attributes with the colors:

### X-Axis

Competition Rating - The attribute of the same name on the product.

### Y-Axis

Product Potential Gain - The attribute of the same name on the product.

### Bubble Color

The bubble color represents the product category.

- Red = Line Extension
- Green = New to Company

- Blue = Modifications
- Purple = New to World

**Bubble Size**

Average Market Share - A percentage attribute from the product. The percentage is derived from adding and averaging the products in the specific product category.

The following portlet filter is available:

**Product Category**

The product category from the portfolio.

## Roadmap Tab

The Roadmap page contains the Roadmap portlet that provides an executive view of future and current projects. You can view groups of projects and products to determine the direction for various product lines. Road mapping refers to that capability. The Roadmap portlet provides the metrics for executives and analysts to plan out product futures. This portlet shows projects and products, which have different stages based on their product lifecycle stage. The Roadmap portlet provides baselined data only, including baseline effort and cost as compared to actuals. Drill down to review project, or product dependencies and their hierarchies.

The following columns are displayed on this portlet:

**Product Line/Investment**

The product line that the project or product belongs to (parent) or the name of the project or product (child). Click the + sign to view the projects or products assigned to the product line. Click the item to open the project or product properties page.

**Dependencies Icon**

Click the icon to open the project or product dependencies page.

**Hierarchy Icon**

Click the icon to open the project hierarchy page.

**Lifecycle Phase**

The current stage of the project or product.

**Status**

The project or product status indicator.

**Baseline Effort**

The baseline number of hours on the project or product.

**Baseline Cost**

The total planned cost for the project or product.

**Actual Effort**

The actual number of baseline hours on the project or product.

**Actual Cost**

The total actual cost for the project or product.

The following portlet filter is available:

**Product Line(s)**

Click the Browse icon to filter by the product line from the investment.

## Launch Dashboard Tab

The Launch Dashboard page contains two portlets that provide information specific to projects about to launch new products.

- Launch Performance by Brand
- Expected Product Launches by Product Line

## Launch Performance by Brand

The Launch Performance by Brand portlet is designed to show the percentage of project launches that are on time. The portlet compares each brand according to a timescale of early delivery, on time, 30 days late, or more than 30 days late. The portlet combines all the projects in one brand and uses the difference between project completion date and project launch date to determine where the launch falls on the timescale.

- The column stacks represent the percent value for the difference between the launch date on the product against the launch date on the project. The value is aggregated for each brand, so it represents an average.
- The Y-Axis displays the name of the brand.
- The X-Axis displays percentages from 0 to 100.

The following portlet filters are available:

**Brand**

Click the multi-select browse icon to pick one or more brands for display in the portlet.

**Year**

Select a year from the drop-down list. Select All to view all of the portfolios.

## Expected Product Launches By Product Line

For future planning, the portlet displays upcoming launches sorted by product line and distributed per year. The information is very useful for planning purposes to see if one product line is favored over another and to think about how launches affect the marketplace.

- Each column stack represents a product line and the total number of launches expected for the specified year.
- The Y-Axis displays the number of launches.
- The X-Axis displays the years.

The following portlet filters are available:

### Year

Select a year from the drop-down list. Select All to view all the products.

### Product Line

Click the multi-select browse icon to pick one or more of the product lines for display in the portlet.

## R&D Dashboard Tab

The R&D Dashboard page contains two portlets that provide information specific to projects and portfolios under development.

- Life-Cycle Funnel
- Strategic Planning Cost Analysis

### Life-Cycle Funnel

The Life-Cycle Funnel portlet shows all the projects dispersed throughout the five stages for NPD. The portlet is designed to convey the number of projects per stage. Using the portlet, prepares executives and product development teams for upcoming months.

The funnel slices represent each project stage, starting with Idea Screen, Scoping, Business Case, Development, Test and Validate, and then Launch. The portlet displays the project stage name and the number of projects in that stage.

The following portlet filters are available:

### Portfolio

Click the browse icon to select a portfolio for display in the portlet.

**Status**

Defines the portfolio investment status for display in the portlet.

**Values:**

- All
- Approved
- Unapproved

## Strategic Planning Cost Analysis

The Strategic Planning Cost Analysis portlet shows executives and development management their spending per stage on one or more projects. You can select the project from the portlet filter and the fiscal time period.

- Each column stack represents one time period.
- Each stack in the column represents the planned cost for that particular stage.
- The Y-Axis displays monetary amounts based on the project financial plans.
- The X-Axis displays the selected fiscal time periods.

The following portlet filters are available:

**Product Category**

Select a category from the drop down list.

**Project(s)**

Click the multi-select browse icon to pick one or more projects for display in the portlet.

**Period Type**

Required. Select a period type (Monthly or Quarterly) from the drop-down list.

**Period**

Select a specific fiscal time period from the drop-down list.

## Portfolio Management Dashboard

The Portfolio Management Dashboard provides project portfolio managers with a collection of portlets that show metrics specific to idea, project, and product portfolios.



## Portfolio Management Overview

The Overview page contains three portlets that provide the project portfolio manager with metrics specific to the idea, project, and the product portfolios:

- Gate Review
- My Action Items
- My Projects

To view the portlets, click Portfolio Management Dashboard in the New Product Development menu. The overview page displays.

The [Gate Review](#) (see page 48) and [My Action Items](#) (see page 50) portlets display identical functionality to the portlets found in the Executive Dashboard.

## My Projects

The My Projects portlet shows all the projects currently moving through the gating process.

The following columns are displayed on the portlet:

### **Project**

The name of the project. Click on the name to drill down to the project properties page.

### **Current Stage**

The current stage of the project.

### **Team**

Click the Detailed Resource Information icon to drill down to the team detail page.

### **Tasks**

A list of the tasks completed or currently running for the project. Click the icon to drill down to the WBS page of project tasks.

### **Documents**

Click the Document Manager icon to drill down to the project document manager page.

### **Stage Review**

Click the icon to drill down to the Stage Review portlet.

The following portlet filters are available:

### **Project Name**

Enter a name to search by project.

**Project Manager**

Select a manager from the drop-down list.

**Project ID**

Enter an ID to filter by project ID.

**Active**

Select a project status from the drop-down list (All, Yes, or No).

## Pipeline Planning

The Pipeline Planning page contains three portlets that display portfolio and project metrics.

- Projects in Development
- My Portfolios
- Prioritized Scored List of Projects

### Projects in Development

The Projects in Development portlet provide a portfolio manager with an understanding of upcoming project loads based on stages.

The portlet is a bubble chart designed to provide a view of a group of projects based on their current stage and costs. The background colors represent each stage and the bubble colors represent gate decisions. The size of the bubble indicates how high the gate score was (the larger the bubble, higher the score).

### My Portfolios

My Portfolios is a snapshot portlet designed to show metrics for the portfolios you have access to view based on your role.

The following columns are displayed on the portlet:

**Portfolio**

The name of the portfolio.

**Budgeted Benefit**

The planned benefit field on the portfolio.

**Budgeted Cost**

The planned cost field on the portfolio.

**Cost Variance**

The variance subtracting cost from benefit.

**Stoplight Icon**

- If the variance is from 0 to 9,999,999 then a green stoplight is shown (under budget).
- If the variance is from -9,999,999 to 0 then a red stoplight is used (over budget).

No filtering is available because of the nature of the portlet.

**Prioritized Scored List of Projects**

Prioritized Scored List of Projects is a snapshot portlet designed to show metrics for the portfolios you have access to view based on your role. No filtering is available because of its nature, displaying the portfolios the user can view.

The following columns display on the portlet:

**Project**

The name of the project. Click on the name to drill down to the project details page.

**Stage**

The current stage on the project.

**Gate Score**

The stoplight icon and gate score number (from the idea gate score field).

- Green = Go
- Yellow = Hold
- Red = Kill

**Gate Decision**

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill
- Blue = Recycle

**Manager**

The user assigned to manage the project.

### **Strategic Fit and Importance**

The standard stoplight.

- Green = Aligns Very Well
- Blue = Supports
- Yellow = Somewhat
- Red = Not Aligned

### **Product and Competitive Advantage**

The standard stoplight.

- Green = Significant
- Blue = Positive
- Yellow = Modest
- Red = Limited

### **Potential Market Gain**

The standard stoplight.

- Green = Large
- Blue = Significant
- Yellow = Modest
- Red = Small

### **Synergies - Leverage Core Competencies**

The standard stoplight.

- Green = Excellent Opportunity
- Blue = Considerable Opportunity
- Yellow = Some Opportunity
- Red = No Opportunity

### **Technical Feasibility**

The standard stoplight.

- Green = Excellent Feasibility
- Blue = Good Likelihood of Feasibility
- Yellow = Limited Feasibility
- Red = Not Feasible

**Reward to Company**

The standard stoplight.

- Green = Excellent
- Blue = Good
- Yellow = Modest
- Red = Poor Reward

The following portlet filters are available:

**OBS Unit**

Click the browse icon to filter by OBS unit.

**Manager**

Click the browse icon to filter by project manager resource name.

**Stage**

Click the browse icon to filter by project stage.

**Gate Decision**

Select an option from the drop-down list to filter by gate decision (Go, Hold, Kill, or Recycle).

## Portfolio Metrics

The Portfolio Metrics page contains two portlets that display data about portfolios.

- Portfolio Revenue and Cost
- Master Portfolios

### Portfolio Revenue and Cost

Portfolio Revenue and Cost is a column chart portlet that compares displays cost and revenue per portfolio. The portlet is a side-by-side display for comparison purposes. The comparison based on the total revenues and total cost for the portfolio is not time-based.

- The red column indicates costs.
- The blue column indicates revenue.
- The Y-Axis displays the cost/revenue amount.
- The X-Axis displays portfolio names.

The following portlet filter is available:

**Portfolio**

Click the multi-select lookup icon to pick one or more portfolios for display in the portlet.

## Master Portfolios

Master Portfolios is a snapshot portlet designed to display hierarchies of portfolios. A parent portfolio can be selected and different configurations of the children portfolios can be selected.

The following columns display on this portlet:

**Portfolio**

Displays the portfolio name. Click on the name to drill down to the portfolio scorecard page.

**Portfolio Planned Cost**

The planned cost of the portfolio.

**Investments Planned Cost**

The planned cost value of all investments in the portfolio.

**Cost Variance**

Displays the variance subtracting the total cost of investments from the portfolio planned cost.

**Variance Stoplight**

Displays the variance from the planned costs.

- If the variance is from 0 to 9,999,999, a green stoplight is used (under budget).
- If the variance is from -9,999,999 to 0, a red stoplight is used (over budget).

**Portfolio Planned Revenue**

Total planned revenue for the portfolio.

The following portlet filters are available:

**Portfolio**

Click the browse icon to filter by portfolio name.

**Parent Portfolio**

Click the browse icon to refine the filter to search by parent portfolio name.

## Idea Management Dashboard Overview

The idea management overview page provides general information for a marketing or product manager. The following portlets display on the page:

- Ideas
- Idea Gate Review
- My Action Items
- Idea Processes

### Ideas

The Ideas portlet provides the means to create ideas. The only functionality in the portlet is the New button, which links to the create idea page.

### Idea Gate Review

The Idea Gate Review portlet is similar to the [Gate Review](#) (see page 48) portlet except it displays more information specific to ideas. The portlet shows all the submitted ideas currently going through the screening (gating) process, providing quick updates to marketing and product managers as they gauge where ideas are in the approval process.

The following columns display on the portlet:

**Gatekeeper**

The name of the gatekeeper. Click on the name to drill down to the resource properties page.

**Properties Icon**

Click on the icon to view the gate scoring properties page.

**Idea**

The name of the idea. Click on the name to drill down to the idea properties page.

**Stage**

The current stage of the idea.

**Score Date**

The date when the gate score was completed.

**Gate Score**

The stoplight icon and gate score number (from the idea gate score field).

### **Idea Comparison**

Click on the icon to drill down to the idea comparison page.

The following portlet filters are available:

### **Gatekeeper**

Click the browse icon to filter by resources assigned as Gatekeepers.

### **Stage**

Click the browse icon to filter by stage.

### **Score Date**

Select a date range to filter by the score date.

### **Idea**

Click the browse icon to filter by stage.

### **Manager**

Click the browse icon to filter by resources who have been assigned as managers.

### **Status**

Select an idea status from the drop down list (All, Approved, Unapproved).

## **My Action Items**

My Action Items portlet displays all the notifications and scheduled action items that a marketing, process, or product manager receives.

The following columns display on the portlet:

### **Action Item**

The name of the action item. Click on the action item to drill down to the action item details page.

### **Priority**

Based on high, medium, or low priority with corresponding red, yellow, or green stoplights.

### **Status**

Displays the status.

**Values:** Open, Closed, Deferred, Done, and In Progress

### **Date Received**

The date that the action item was assigned to the user.



**Process Icon**

Click on the icon to drill down to the process diagram page.

The following portlet filters are available:

**Status**

Specifies the status.

## Idea Processes

The Idea Processes portlet quickly updates a product or marketing manager as to the current ideas moving through approval process. You can click the process icon to see the progress of idea and drill down to the idea properties page.

The following columns display on the portlet:

**Idea**

The name of the idea. Click on the name to drill down to the idea properties page.

**Status**

The status of the idea: Aborted, Aborting, Done, Error, Running.

**Start Date**

The date that the process was initiated.

**End Date**

The date that the process was marked as Done.

The following portlet filters are available:

**Idea Requester**

Click the browse icon to select an individual resource and display only their ideas in the portlet.

**Status**

Select a status from the drop-down list.

**Start Date**

Select the date to filter by the process start date.

## Stage Review

The Stage Review Dashboard provides project managers with access to all the pertinent areas they review before submitting an idea or project for approval to move on to the next stage. The page level filtering allows you to select a project and a stage to view one stage across all the portlets.

### Resource Review Tab

The Resource Review page contains one portlet that provides the project manager with general resource information.

To view the portlet, open the New Product Development menu, and from Stage Review, click Resource Review.

### Resource Utilization

The Resource Utilization portlet contains a complete listing of all the resources that have been assigned to the project. The portlet displays allocations and assignments and the variance between them. A time period can be selected, based on the company-entered time periods, for display of the resource data. The data repeats for each time period and displayed by using two header rows: one for the time periods and one for the column names.

For data to appear in the portlet, resources allocated to the project and assigned to tasks on the project.

The following columns display on the portlet:

**Resource**

Displays the name of the resource (last name, first name) associated to the specific issue. Click on the resource name to drill down to the resource/role allocations page.

**Allocation**

The number of hours the resource is allocated to the selected project.

**Assignment**

The number of hours the resource is assigned to the selected project.

**Variance**

The difference between Allocation minus Assignment. For a negative number, the user is under-allocated. For a positive number, the user is over-allocated.

These four columns repeat with each time period. The time periods display in a row above the column headers.

The following portlet filters are available:

**Project**

Type in the project name to search by project.

**Stage**

Click the browse icon to filter by stage; only the resources assigned to tasks in that stage display.

**Resources Only?**

Select an option from the drop-down list (All, No, Yes).

**Manager**

Click the browse icon to filter by manager name.

**Period Type**

Select a period type from the drop-down list.

## Document Review

The Document Review page contains four portlets that show documents from the document manager repository in different views.

- Deliverables
- Gate Documents
- Worksheets
- All Documents

To view these portlets, open the New Product Development menu, and from Stage Review, click Document Review.

By default, only the All Documents portlet displays. To view the remaining three portlets, select them from the drop-down list.

### All Documents

The All Documents portlet is a complete listing of all the documents uploaded to the project. The portlet displays information about the project schedule, due dates, and categories and provides a link to drill down to the document itself. The portlet is designed for project managers to view all the documents currently available for the project.

The following columns display on the portlet:

**Document Manager Icon**

The link to the document manager to view the entire folder structure and documents. Click on the document name to drill down to the Collaboration - project document manager page.

**Document**

The name of the document and also serves as a link to open the document. Click on the document name to open the document.

**Status**

The status of the document. The options are tied to standard stoplights:

- Green = Approved
- Yellow = Submitted
- Red = Rejected

**Schedule**

The schedule is based on the completion date for the task (phase) that the document is associated with. All documents for a phase require completing by the end date of that phase.

- Green = If the task finish date is greater than 30 days from today.
- Yellow = If the task finish date is greater than or equal to today and less than 30 days from today
- Red = If the task finish date is past
- Blue = All else

**Due Date**

Displays the date of completing the milestone task that matches the documents folder.

**Stage**

The document folder. Each of the folders represents a project stage and is labeled with the same names as the project stages.

**Important!** Each folder is linked to the phase part of the WBS. For example, Scoping, Business Case, or Development. Do not change the names of the folders and phases. Otherwise, the document review portlets do not work correctly. If changing the folder and phase names is necessary, modify all the document review portlets with the new names.

**Category**

The document category assigned to a document when it is uploaded to the repository. The category can be any of: Proposal, Planning, Development, Implementation, Operations.

**Owner**

The individual that uploaded the document. Click on the owner name to drill down to the resource properties page.

**Last Updated Date**

The date when the most recent version was uploaded to the repository.

**Last Revision Comments**

The comments list from the latest version that was uploaded to the repository.

The following portlet filters are available:

**OBS**

Filter by Standard Organizational Breakdown Structures (OBS).

**Project**

Filter by project.

**Stage**

Filter by stage based on the stage values for NPD.

**Manager**

Filter by manager.

**Status**

Filter by project status (approved or unapproved).

**Document Category**

The document categories of Proposal, Planning, Development, Implementation, Operations.

**Document Status**

Filter by status (Approved, Rejected, Submitted).

**Document Schedule**

A lookup with two choices: All, for all the documents and Late, for the ones that are late in relation to the milestone task finish date.

**Document Owner**

Filter by the user who uploaded the document.

**Document Name**

A free entry text field to type in the document name or part of the document name using wildcards.

### **Document Due Date**

A date range filter to retrieve those documents that have due dates between the entered dates.

### **Deliverables**

The Deliverables portlet is identical to the All Documents portlet except that it limits the display to the documents that are in a Deliverables folder in the document repository.

### **Gate Documents**

The Gate Documents portlet is identical to the All Documents portlet except that it limits the display to the documents that are in the Gate Documents folder in the document repository.

### **Worksheets**

The Worksheets portlet is identical to the All Documents portlet except that it limits the display to the documents that are in the Worksheets folder in the document repository.

## **Idea Management Dashboard**

The Idea Management Dashboard is built for product managers and marketing managers who require accessing idea metrics as they push ideas through the approval process.

### **Idea Vault**

The Idea Vault page provides a complete listing of all the ideas entered and general idea information for a marketing or product manager. The page includes a built-in power filter to automatically include all ideas that have gone through the idea scoring process. The Idea Vault provides a view of all reviewed ideas and the ability to create 'what if' scenarios to finalize product portfolio plans.

Use this portlet to filter by gate decision to determine the number of ideas converted to projects, put on hold, or killed. The portlet shows the key gate factors and gate decision, and the ability to drill down to the idea properties for more details.

Kill and Hold ideas are maintained in the Idea Vault so they can be reviewed for future consideration at any time. Only ideas that have gone through the scoring/screening process are maintained in the Idea Vault.

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To view the portlet, open the New Product Development menu, and from Idea Management Dashboard, click Idea Vault.

The following columns are displayed on the portlet:

**Idea**

The name of the idea. Click on the name to drill down to the idea properties page.

**Gate Score**

The stoplight icon and gate score number (from the idea gate score field).

**Gate Decision**

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill

**Strategic Fit and Importance**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

**Product and Competitive Advantage**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

**Market Attractiveness**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

**Reward to Company**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

### **Synergies - Leverage Core Competencies**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

### **Technical Feasibility**

The red/yellow/green stoplight.

- Green = High
- Yellow = Medium
- Red = Low

### **Customer Market**

The customer market value taken from the investment attribute.

### **Customer Segment**

The customer segment value taken from the investment attribute.

The following portlet filters are available:

### **Product Category**

The selected product category on the idea.

### **Product Line**

Select a product line from the drop-down list.

### **Product Type**

Select a type to filter the product type.

### **Brand**

The idea brand.

### **Strategy**

Select an idea strategy from the drop-down list.

### **Customer Market**

Select a market from the drop-down list.

### **Customer Segment**

Select a segment from the -down list.

### **Gate Decision**

Click the multi-select browse icon to filter by a combination of decisions.



## Idea Financials

The idea financials page contains one portlet that displays financial data about Ideas.

To view this portlet, open the New Product Development menu, and from Idea Management Dashboard, click Idea Financials.

## Idea Revenue and Cost

The Idea Revenue and Cost portlet provides a view of the potential dollars made and dollars spent for all ideas. The portlet displays two columns for each idea: the red column represents the costs and the blue column represents the revenue.

- The red column indicates costs.
- The blue column indicates revenue.
- The Y-Axis displays the cost/revenue amount. The values are derived from the idea Planned Cost field and the Planned Benefit field.
- The X-axis displays idea names.

The following portlet filters are available:

### **Product Category**

The product category from the idea.

### **Product Line**

Select a product line from the drop-down list.

### **Strategy**

Select a strategy from the drop-down list.

### **Customer Market**

Select a customer market from the drop-down list.

### **Customer Segment**

Select a customer market from the drop-down list.

### **Gate Decision**

Select a decision filter from the drop-down list.

## Financial Review Tab

The Financial Review page contains a portlet that displays different levels of the project cost and benefit plans.

To view this portlet, open the New Product Development menu, and from Stage Review, click Financial Review.

## Financial Plan vs. Actual Review

The Financial Plan vs. Actual Review portlet is a complete listing of all the documents that have been uploaded to the project. The portlet shows planned and actual costs and benefits and the variance between them. The information is available at each cost plan detail level in a hierarchical display.

The first level is the Investment, the second level is the Cost Plan and Benefit Plan, and the third level and down are the detail rows on the cost and benefit plans.

The following columns display on this portlet:

### **Investment/Plan Detail**

Displays the name of the investment and the name of the cost and benefit plan. Click the investment name to open the project properties page.

### **Planned**

Displays the planned cost or planned benefit number depending on the row.

### **Actual**

Displays the actual cost or actual benefit number depending on the row.

### **Variance**

The difference between Planned minus Actual. For costs, a negative number more spending than planned. For a positive number, less money spent than planned. For benefits, a negative number signals the revenues were greater than anticipated. If there is a positive number, the revenues were less than anticipated.

The following portlet filters are available:

### **Project**

Click the browse icon to filter by project.

### **Stage**

Select a project stage from the drop-down list.

### **Period Type**

Select a period type from the drop-down list.

### **Period Start**

Select the date based on the start date for the time period.

### **Period End**

Select the date based on the end date for the time period.

---

## Schedule Review

The Schedule Review page contains one portlet that displays the project work breakdown schedule.

To view the portlet, open the New Product Development menu, and from Stage Review, click Schedule Review.

## Master Schedule

The Master Schedule portlet is a complete listing of tasks in the WBS. The portlet includes task metrics such as ETC, baseline cost, actual costs, finish date, days late, and several others. The place is where the project manager can confirm that all the tasks for a specific gate are completed and when ready, the project manager can drill down to the specific gate milestone, and submit for the approval to move on to the next gate.

The following columns display on the portlet:

### **Project/WBS/Resource**

The name of the project, the name of the task, or the name of the resource, depending on the level expanded in the hierarchy. Click on the project name to drill down to the project or task or resource properties page.

### **Finish**

The date for completing the task.

### **Days Late**

The calculated number of days of delay.

### **ETC**

The number of ETCs on the task.

### **ETC Cost**

The monetary amount of ETCs on the task.

### **Baseline Cost**

A monetary amount for the baseline cost. Baseline the project to get the data.

### **Actual**

The actual hours for the task.

### **Actual Cost**

A monetary amount for the actual cost. Baseline the project to get the data, and requires timesheets submitted, approved, and posted.

### **EAC Cost**

A monetary amount for the EAC cost. Baseline the project to get the data.

### **Gantt**

Defaults to a monthly display. List the months across the top and display a colored bar to mark progress of the task.

The following portlet filters are available:

### **Project**

Click the browse icon to filter by project.

### **Stage**

Click the browse icon to filter by stage.

### **Project Manager**

The project manager from the project object.

### **Status**

Select a project status from the drop-down list (Approved or Unapproved).

## **Critical Issue Review**

The critical issue review page contains one portlet that displays all the issues from the project (not risks or change requests).

To view this portlet, open the New Product Development menu, and from Stage Review, click Critical Issue Review.

## **Project Issue Review**

The project issue review portlet displays all of the issues for a project. The portlet includes the description and stoplight displays for schedule and priority. The project manager can check on resolution dates and drill down to view specific issues.

The following columns display on this portlet:

### **Schedule**

The red/yellow/green stoplight based on the target resolution date and the number of days before or after marking the issue as resolved. An attribute created with the NSQL query for the portlet:

- Green = -100,000 to 1
- Yellow = 1 to 3
- Red = 3 to 100,000

**Priority**

The red/yellow/green stoplight based on the priority for the issue. An attribute created with the NSQL query for the portlet:

- Green = Low
- Yellow = Medium
- Red = High

**Issue ID**

The issue ID number. Click on the ID number to drill down to the issue properties page.

**Issue Description**

The description of the issue. Click on the description to drill down to the issue properties page.

**Category**

The issue category name.

**Owner**

The owner for the issue, displayed as last name, first name. Click on the owner name to drill down to the resource properties page.

**Email Icon**

A link to send an email to the owner. Click on the icon to send an email to the project owner.

**Target Resolution Date**

The target resolution date on the issue.

The following portlet filters are available:

**OBS**

Filter by Standard Organizational Breakdown Structures (OBS).

**Manager**

Click the browse icon to filter by the issue category.

**Status**

Click the browse icon to filter by project.

**Project**

Click the browse icon to filter by project.

**Stage**

**Issue Category**

Click the browse icon to filter by the issue category.

**Issue Priority**

Select a priority from the drop-down list.

**Issue Owner**

Click the browse icon to filter by project.

**Issue Status**

Select a status from the drop-down list.

**Target Resolution Date**

Select a date range to look for issues between dates.

## Portfolio Master Page Layouts

Portfolios allow managers to group and view their investments together. CA Clarity PPM Accelerator for NPD has two portfolio portlets that allow project and product managers to create scenarios when they build out portfolios and compare changes in schedule, cost, and resources from a scenario, with their current plan of record.

The [Product Master Portfolio page layout](#) (see page 78) is a set of pages and portlets that can be selected as the layout when viewing a portfolio. The layout is designed to work with product portfolios where an organization is tracking specific product lines or brands.

The [Project Master Portfolio page layout](#) (see page 86) supports the NPD metrics for projects. The layout includes portlets to assist with future project planning and reviewing of costs and revenues.

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

## Product Master Portfolio Page Layout

Costs and revenues can be tracked using existing CA Clarity PPM functionality. Product Master Portfolio populates all or a subset of products. Product Managers wanting to track groups of products according to product line and brand, can build with the power-filter in Portfolios.

The product master portfolio page layout comprises several comparison portlets to compare the current plan of record with different scenarios. Competitor information can be tracked for products and to create competitor portfolios for use in product planning.

## Market Analysis Tab

The Market Analysis page contains four portlets that provide general information for a marketing or product manager.

- Product Market Growth (plan of record)
- Product Market Growth
- Product Financials (plan of record)
- Product Financials

To view these portlets, click Portfolios in the Portfolio Management menu. Click the NPD Product Master link, and then click Market Analysis.

## Product Market Growth (plan of record)

The Product Market Growth (plan of record) portlet is a bubble chart that displays individual products based on their product category. For example, new to world or new to company. The portlet displays the current plan of record for a product portfolio (the portfolio requires products in it for the bubble chart to work).

The portlet compares some of the metrics for the product price trend on the X-axis and the product market projections on the Y-axis. For example, the portlet provides a view of which products have stronger price points and higher market gains against products having good market gain but weak price points. Several other comparisons can be made with the portlet data.

The legend lists each of the following attributes with the colors:

### X-Axis

Product Price Position.

### Y-Axis

Market Growth Projection.

### Bubble Color

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

### Bubble Size

Market Attractiveness

The following portlet filters are available:

**OBS Unit**

Click the browse icon to filter by OBS unit.

**OBS Unit Filter Mode**

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

## Product Market Growth

The Product Market Growth bubble chart is similar to the Product Market Growth (plan of record) portlet. The portlet also displays individual products based on their product category. But now they are based on a selected scenario, rather than the plan of record.

The legend lists each of the following attributes with the colors:

**X-Axis**

Product Price Position (Calculated).

**Y-Axis**

Market Growth Projection (Calculated).

**Bubble Color**

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

**Bubble Size**

The bubble size represents the market share.

The following portlet filters are available:

**OBS Unit**

Click the browse icon to filter by OBS unit.



**OBS Unit Filter Mode**

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

**Product Financials (plan of record)**

The following columns are displayed on the portlet:

**Product**

The product name. Click on the name to drill down to the product properties page.

**Grid with Plus (Add to Scenario) Icon**

Click the icon to drill down to the create scenarios page.

**Product Category**

The selected product category on the project.

**Planned Revenue**

Total planned revenue for the project.

**Planned Cost**

Total planned cost for the project.

**Actual Cost**

Total actual cost for the project.

**Remaining Cost**

The difference between actual cost and planned cost.

**Planned NPV**

NPV percentage from the project.

**Planned ROI**

ROI percentage from the project.

**Planned Breakeven**

Displays the date and amount to indicate the period and value at which the program becomes profitable.

The following portlet filters are available:

**Planned NPV**

NPV percentage from the project.

**Planned ROI**

ROI percentage from the project.

**Product Financials**

The following columns are displayed on the portlet:

**Name**

The product name. Click on the name to drill down to the product properties page.

**Grid with Plus (Add to Scenario) Icon**

Click the icon to drill down to the Create Scenarios page.

**Product Type**

The selected product type on the project.

**Planned Benefit**

The total planned benefit of the portfolio.

**Planned Cost**

Total planned cost for the project.

**Actual Cost**

Total actual cost for the project.

**Remaining Cost**

The difference between actual cost and planned cost.

**Planned NPV**

NPV percentage from the project.

**Planned ROI**

ROI percentage from the project.

**Planned Breakeven**

Displays the date and amount to indicate the period and value at which the program becomes profitable.

The following portlet filters are available:

**OBS Unit**

Click the browse icon to filter by OBS unit.

**OBS Unit Filter Mode**

Select a filter mode from the drop-down list.

- Unit only
- Unit and descendants
- Unit and ancestors

## Competitive Analysis

The Competitive Analysis page contains two portlets that provide general information for a marketing or product manager.

- Competitive Comparison (plan of record)
- Competitive Comparison (compare to)

To view the portlets, click Portfolios in the Portfolio Management menu. Click the NPD Product Master link, and then click Competitive Analysis.

## Competitive Comparison [Plan of Record]

The Competitive Comparison [Plan of Record] portlet is a bubble chart that displays individual products based on their product category. For example, new to world or new to company. The portlet displays the current plan of record for a product portfolio (the portfolio must have products in it for the bubble chart to work).

The portlet compares the metrics for the competition rating on the X-axis and the customer value perception on the Y-axis. The portlet helps product analysts review competitive information in the plan of record as compared to a scenario.

The legend lists each of the following attributes with the colors:

**X-Axis**

Competition Rating.

**Y-Axis**

Customer Value Perception.

**Bubble Color**

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

**Bubble Size**

Market Share

The following portlet filters are available:

**Planned Cost**

Enter a range for the planned cost.

**Finish Date**

Enter a date range.

**Competitive Comparison [Competitors]**

The Competitive Comparison [Competitors] bubble chart is similar to the Competitive Comparison [Plan of Record] portlet. The portlet also displays individual products based on their product category, except it displays for a selected scenario, rather than the plan of record.

The portlet compares the metrics for the competition rating on the X-axis and the customer value perception on the Y-axis. The portlet helps product analysts review competitive information in the plan of record as compared to a scenario.

The legend lists each of the following attributes with the colors:

**X-Axis**

Competition Rating.

**Y-Axis**

Customer Value Perception.

**Bubble Color**

The bubble color represents the product category.

- Green = New to World
- Blue = New to Company
- Grey = Line Extension
- Purple = Modification
- Yellow = Enhancement

**Bubble Size**

Market Share

The following portlet filters are available:

**Planned Cost**

Enter a range for the planned cost.

**Finish Date**

Enter a date range.

**Role Comparison Tab**

The Role Comparison page contains two portlets that provide general information for a marketing or product manager.

- Role Capacity and Demand [Plan of Record]
- Role Capacity and Demand [Compare to Scenario]

To view the portlets, open the Portfolio Management menu, and click Portfolios. Click the NPD Product Master link, and then click Role Comparison.

**Role Capacity and Demand [Plan of Record]**

The Role Capacity and Demand [Plan of Record] portlet displays individual roles that are associated to the portfolio with allocation, availability, and the variance between the two. The portlet displays the current plan of record for the portfolio and current role plans across selected time periods.

The portlet helps product analysts review resource assignments in the plan of record as compared to a scenario.

The following columns display on the portlet:

**Role**

The portfolio name. Click the name to open the role properties page.

**Availability**

The available hours across all the resources that belong to the role and portfolio, and it is specific to the time period. For example, monthly or quarterly.

**Allocation**

The allocated hours across all the resources that belong to this role and this portfolio, and it is specific to the time period. For example, monthly or quarterly.

**Variance**

A red or green stoplight displays based upon the calculation of subtracting the allocation from the availability.

- Red = if availability is LESS THAN allocation.
- Green = if availability is GREATER THAN allocation.

The following portlet filters are available:

**Month(s)**

Click the Browse icon to pick one or more months or years for display in the portlet.

## Role Capacity and Demand [Compare to Scenario]

The Role Capacity and Demand [Compare to Scenario] grid portlet displays individual roles that are associated to the portfolio with allocation, availability, and the variance between the two. The portlet is the companion portlet to the Role Capacity and Demand [Plan of Record] portlet, and it displays a selected scenario with role plans across selected time periods. This portlet helps product analysts review resource assignments in the plan of record as compared to a scenario.

The following columns display on the portlet:

**Role**

The portfolio name. Click on the name to drill down to the role properties page.

**Availability**

The available hours across all the resources that belong to this role and this portfolio, and it is specific to the time period. For example, monthly or quarterly.

**Allocation**

The allocated hours across all the resources that belong to this role and this portfolio, and it is specific to the time period. For example, monthly or quarterly).

**Variance**

A red or green stoplight display based upon the calculation of subtracting the allocation from the availability.

- Red = if availability is LESS THAN allocation.
- Green = if availability is GREATER THAN allocation.

The following portlet filters are available:

**Month(s)**

Click the multi-select browse icon to pick one or more months or years for display in the portlet.

## Project Master Portfolio Page Layout

The Project Portfolio Page Layout is a set of pages and portlets you can select as the layout when viewing a portfolio. This layout is built for project managers to view groups of projects to review statistical trends and metrics.

## Scorecard Tab

The Scorecard page contains two portlets that display project metrics in the portfolio.

- Projects
- Stage Gate Review

To view the portlets, open the Portfolio Management menu, click Portfolios. Click the NPD Project Master link, and then click Scorecard.

## Projects

The Projects portlet is a listing of all the projects in the selected portfolio. The portlet shows a variety of metrics with graphics for easy viewing of project status. The portlet also includes costs, ROI, and NPV. This portlet is reminiscent of the Idea Vault, but instead of ideas, you have projects in all the different statuses and states of execution.

The following columns display on the portlet:

### Project

The name of the project. Click on the name to drill down to the project properties page.

### Hierarchy Icon

Click the icon to drill down to the project hierarchy page.

### Grid with Plus (Add to Scenario) Icon

Click the icon to drill down to the portfolios scenarios page.

### Gate Score

The stoplight icon and gate score number (from the project or idea gate score field).

### Gate Decision

The current gate decision represented by a colored, directional arrow.

- Green = Go
- Yellow = Hold
- Red = Kill
- Blue = Recycle

### Stage

The current stage of the project.

### Customer Market

The customer market selection on the project.

**Product Category**

The selected product category on the project.

**Ranking**

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

**Planned Revenue**

Total planned revenue for the project.

**Planned Cost**

Total planned cost for the project.

**Actual Cost**

Total actual cost for the project.

**Remaining Cost**

The difference between actual cost and planned cost.

**Planned ROI**

ROI percentage from the project.

**Planned NPV**

NPV percentage from the project.

The following portlet filters are available:

**Product Category**

Select a category from the drop-down list.

**Product Line**

Select a product line from the drop-down list.

**Gate Decision**

Select a gate decision from the drop-down list.

**Customer Market**

Select a customer market from the drop-down list.

**Customer Segment**

Select a customer market from the drop down list.

**Stage**

Filter by stage; based on the stage values for NPD.

**Gate Score**

Filter by gate score; enter a score in the field.



**Project Manager**

Click the browse icon to filter by project manager.

**Stage Gate Review**

The Stage Gate Review portlet is a graph that displays all the projects in the portfolio as bubbles based on the stage and cost of the project. The portlet provides you with a visual of where to focus resources and budget, and what to be planning for as projects move towards the launch stage.

The legend lists each of the following attributes with the colors:

**X-Axis**

Projects Grouped by Stage - each section of the graph represents one of the five stages for a project.

**Y-Axis**

Planned Cost - The total planned cost from a project.

**Bubble Color**

The bubble color represents the gate decision.

- Gold = Green
- Red = Kill
- Yellow = Hold
- Blue = Recycle

**Bubble Size**

Gate Score.

**Background Color**

A list of the stages with their colors and the placement on the X-axis.

- Scoping is first (2-3)
- Business Case is second (3-4)
- Development is third (4-5)
- Test and Validate is fourth (5-6)
- Launch is fifth (6-7)

The following portlet filters are available:

**Gate Decision**

Select a gate decision from the drop-down list (Go, Kill, Hold, Recycle, All).

## Resources

The resources page contains a portlet that provides the role demand data.

To view the portlet, open the Portfolio Management menu, click Portfolios. Click the NPD Project Master link, and then click Resource Demand on Projects.

## Resource Demand on Projects

The Resource Demand on Projects portlet highlights the total resource and role hours per project, such as start and end dates, and planned cost. Portfolio managers can easily link back to the scenarios tab to play with increasing or decreasing roles for these projects.

The following columns display on the portlet:

### **Project**

The name of the project. Click on the name to drill down to the project properties page.

### **Grid with Plus (Add to Scenario) Icon**

Click the icon to drill down to the portfolios scenarios page.

### **Ranking**

An attribute on the project that allows selection of a number from 1 to 10 to rank projects from most to least important.

### **Start**

The date of starting the project.

### **Finish**

The date of completing the project.

### **Role Demand**

The total number of resource or role hours based on the start and end date for the portfolio. The value does not mirror the total amount of hours on the project if the project falls outside of the range for the portfolio.

### **Planned Cost**

Total planned cost for the project.

# Appendix A: CA Clarity PPM Accelerator for NPD Access Rights

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The access rights listed in this section pertain only to CA Clarity PPM Accelerator for NPD.

See the *Administration Guide* for more information.

This section contains the following topics:

[Non-Clarity User Group Access Rights](#) (see page 91)

[Team Member User Group Access Rights](#) (see page 92)

[Marketing Manager User Group Access Rights](#) (see page 93)

[Project Portfolio Manager User Group Access Rights](#) (see page 94)

[Product Portfolio Manager User Group Access Rights](#) (see page 96)

[Executive User Group Access Rights](#) (see page 97)

## Non-Clarity User Group Access Rights

The Non-Clarity User group access rights provide a collection of security rights for users that infrequently access CA Clarity PPM but still require submitting product ideas.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

### Instance Rights

- Page - View
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

### Global Rights

- Ideas - Create
- Portlet Viewer - All

### Portlet Pages (Dashboards)

- Idea Management Dashboard: Overview and Idea Vault

## Team Member User Group Access Rights

The Team Member user group access rights provide a collection of security rights for users assigned as resources to projects and products in CA Clarity PPM. The users also mainly enter timesheets and upload documents to a project.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

### Instance Rights

- Page - View
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

### Global Rights

- Ideas - Create
- Portlet Viewer - All
- Project - View Tasks - All
- Timesheets - Navigate

### Portlet Pages (Dashboards)

- Idea Management Dashboard: Overview and Idea Vault.

## Marketing Manager User Group Access Rights

The Marketing Manager user group access rights provide a collection of security rights for users that manage ideas and facilitate movement of ideas into the scoring process.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

### Instance Rights

- Page - View
- Process - Cancel (on each CA Clarity PPM Accelerator for NPD process)
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Process - View Definition (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

### Global Rights

- Gate Scoring - Navigate
- Idea - Hierarchy - Parents - Add - All
- Ideas - Create
- Portlet Viewer - All
- Resource - Navigate
- Resource - View All
- Timesheets - Navigate

### Portlet Pages (Dashboards)

- Idea Management Dashboard

## Project Portfolio Manager User Group Access Rights

The Project Portfolio Manager user group access rights provide a collection of security rights for users that manage projects and portfolios and participate in gate scoring.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

### Instance Rights

- Page - View
- Portfolio - Create Scenarios (on Project Master)
- Portfolio - Edit (on Project Master)
- Process - Cancel (on each CA Clarity PPM Accelerator for NPD process)
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Process - View Definition (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

### **Global Rights**

- Department - View - All
- Gate Scoring - Navigate
- Ideas - Create
- Portfolio - View - All
- Portlet Viewer - All
- Project - Benefit Plan - Edit All
- Project - Budget Plan - Edit All
- Project - Cost Plan - Edit All
- Project - Create
- Project - Create from Template
- Project - Risk, Issue, Change Request - Delete - All
- Project - Risk, Issue, Change Request - Edit - All
- Reports - Access
- Reports - Run - All
- Resource - External - Access
- Resource - Navigate
- Resource - Soft Book - All
- Resource - View All
- Timesheets - Navigate

### **Portlet Pages (Dashboards)**

- Idea Management Dashboard
- Portfolio Management Dashboard

## Product Portfolio Manager User Group Access Rights

The Product Portfolio Manager user group access rights provide a collection of security rights for users that manage products and portfolios and participate in gate scoring.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

### Instance Rights

- Page - View
- Portfolio - Create Scenarios (on Product Master)
- Portfolio - Edit (on Product Master)
- Process - Cancel (on each CA Clarity PPM Accelerator for NPD process)
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Process - View Definition (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

### Global Rights

- Department - View - All
- Gate Scoring - Navigate
- Idea - Hierarchy - Parents - Add - All
- Ideas - Create
- Portfolio - Create
- Portfolio - View - All
- Portlet - Viewer - All



- Product - Benefit Plan - Edit All
- Product - Budget Plan - Edit All
- Product - Cost Plan - Edit All
- Product - Create
- Reports - Access
- Reports - Run All
- Resource - Navigate
- Resource - Soft Book All
- Resource - View - All
- Timesheets - Navigate

**Portlet Pages (Dashboards)**

- Idea Management Dashboard
- Executive Dashboard

## Executive User Group Access Rights

The Executive user group access rights provide a collection of security rights for users at an executive, or director level and require insight into portfolios of projects, products, and ideas, and also participate in gate scoring.

The group comprises the following CA Clarity PPM Accelerator for NPD access rights:

**Instance Rights**

- Page - View
- Process - Start (on each CA Clarity PPM Accelerator for NPD process)
- Project - Risk, Issue, Change Request - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View (on the CA Clarity PPM Accelerator for NPD template)
- Project - View Management (on the CA Clarity PPM Accelerator for NPD template)

**Global Rights**

- Gate Scoring - View All
- Idea - Hierarchy - Parents - View - All
- Idea - View All
- Ideas - Create
- Portfolio - Navigate
- Portfolio - View All
- Portlet Viewer - All
- Product - View All
- Product - View Chargebacks Information All
- Product - View Financial Information All
- Product - Benefit Plan - View All
- Project Budget Plan - View All
- Project - Cost Plan - View All
- Project - Edit Management - All
- Project - Hierarchy - Financial Rollup - View - All
- Project - Risk, Issue, Change Request - View - All
- Project - View Financial - All
- Project - View Management - All
- Project - View Requisitions - All
- Project - View Tasks - All
- Project Benefit Plan - View All
- Resource - View All
- Resource - View Book - All
- Resource - View Financial - All

**Portlet Pages (Dashboards)**

- Executive Dashboard