CA Clarity™ PPM

Basics User Guide

Release 13.2.00

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Chapter 1: Introduction

This section contains the following topics:

About this Guide

This guide introduces basic information and techniques for working in CA Clarity PPM. This guide assumes that the reader is a non administrative CA Clarity PPM user who has the appropriate access rights to needed perform basic functions.

The procedures described are for CA Clarity PPM with no customization. If you have personalized changes or if an administrator has modified the user interface, the procedures can vary from what you see.

CA Clarity PPM Training and Training Tools

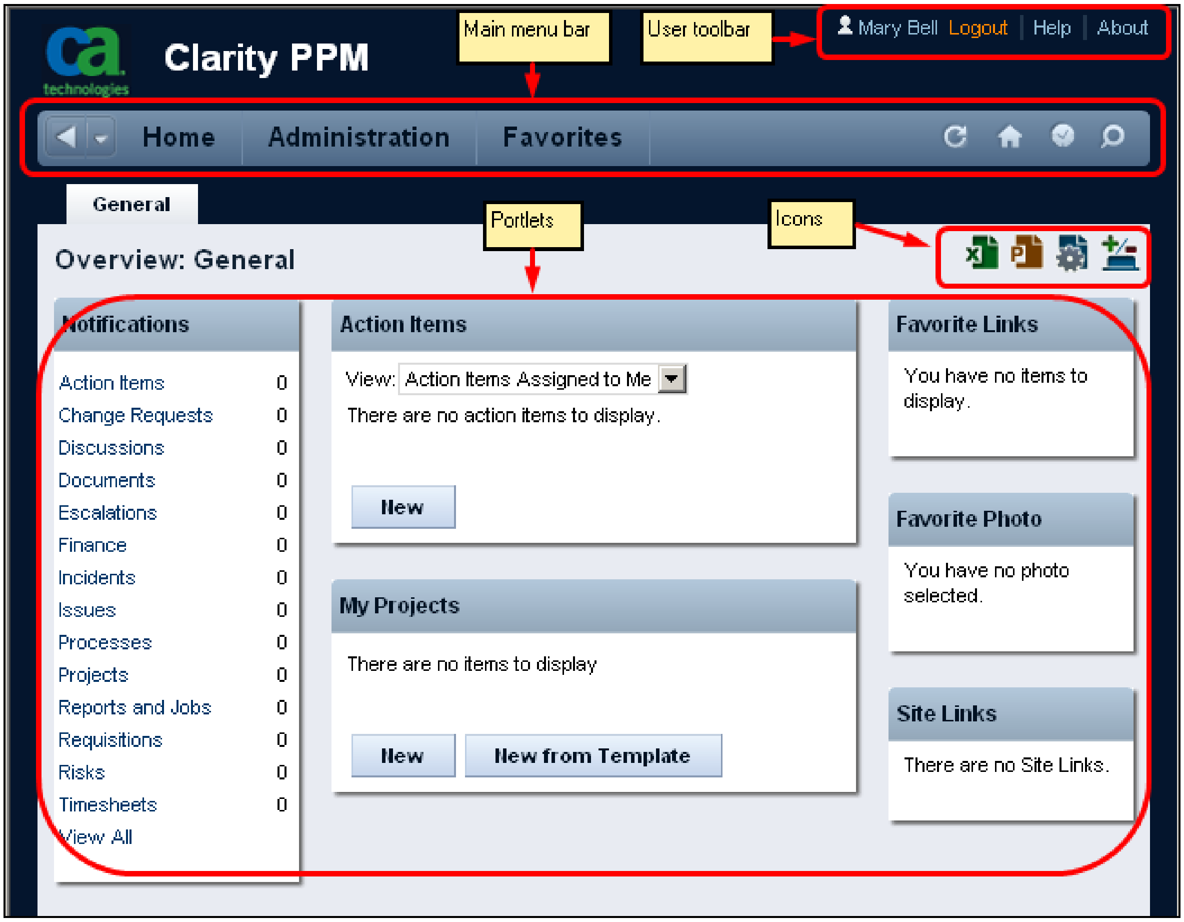
For implementation teams, CA Technologies offers instructor-led and self-paced CA Clarity PPM training. This training is designed to help implementation teams understand CA Clarity PPM functionality so they can make informed decisions on configuring CA Clarity PPM.

For user training, CA Technologies offers the CA Productivity Accelerator (CA PA) solution. You can use this solution to create custom education materials and practice simulations and assessments. The custom education materials are used in classroom training and online simulations. Your users can access the practice simulations and assessments from the Learn link on the User toolbar, or from the learning management system (LMS). CA PA provides standard content modules that you can upload into your CA PA editor and modify to reflect your configuration of CA Clarity PPM. You can also integrate organizational processes and procedures into the CA PA solution.

CA Education offers these training solutions. To learn more about the training offerings and CA PA, see http://ca.com/education.

Quick Tour of CA Clarity PPM

The following illustration shows the default home page for CA Clarity PPM and its main components. The components and features available from this page are described in the following sections.



Main Menu

Move the cursor over the following features on the main menu to see a tooltip that identifies the feature.

The following list explains the numbered features in the preceding figure:

1–Back

Returns you to the previous page. The page you return to is based on the previous entry in the Recent Pages list.

2–Recent Pages (History)

Provides a drop-down list of the pages most recently viewed. You can select from the list to return to a page. Entries are not made for navigation between subpages that belong to a specific instance. For example, if you are navigating between the subpages of a specific project, the subpages are not listed in the Recent Pages list.

3–Home, Administration, and Favorites Menus

Provide the navigation to all CA Clarity PPM pages. The menus and options that you can view depend on your access rights.

4–Refresh

Renews the data on a page.

5–Home

Returns you to the home page.

6–Current Timesheet

Takes you to your current open timesheet.

7–Search

Opens a search window for CA Clarity PPM.

User Toolbar

The User toolbar always displays at the top of the CA Clarity PPM page.

Use the links on the toolbar to access the following:

Logout

Logs you out, ends the session, and presents the Login window.

Help

Provides online help information for individual CA Clarity PPM pages.

About

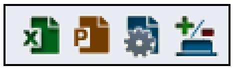
Provides information about the CA Clarity PPM version, the logged-in user, and third-party software.

Learn (Optional)

Presents the CA PA training modules for your organization. If CA PA is not set up for your organization, the link does not display.

Page Icons

The icons shown in the following figure provide quick access to functions needed on a CA Clarity PPM page. Not all icons appear on all pages. If the icons do not appear, the functions they represent are not available for the page.



Export to Excel

Exports information from a page to an Excel format. If a page does not have portlets, the icon does not appear.

Export to PowerPoint

Exports content from a page to a PowerPoint format. If a page does not have portlets, the icon does not appear.

Personalize

Lets you customize a page by adding or removing a portlet, adding or removing a filter, or changing the layout of portlets.

Manage My Tabs

Lets you create new tabs, add content to tabs, and change the layout of portlets on tabs.

For information about using the Personalize or Manage My Tabs icons, see the *Personalizing CA Clarity PPM User Guide*.

Overview Page Portlets

A portlet provides a snapshot of specific CA Clarity PPM data. A portlet can be a list, a chart, or a snippet of HTML. You can select the data that displays in a portlet.

The *Overview* page, contains the following portlets:

Action Items

Provides a list of action items assigned to you.

Favorite Links

Provides a list of internal CA Clarity PPM links you save.

Favorite Photo

Provides a list of your photos.

My Projects

Provides a list of projects you select for easy access from this portlet.

Notifications

Provides a list of notifications sent to you.

Site Links

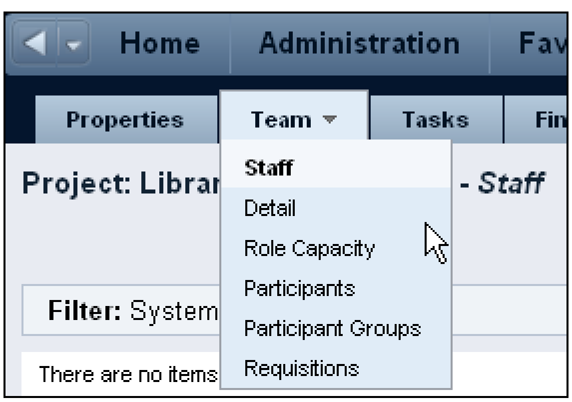
Provides a list of external internet sites you save.

Tab Menus

Some tabbed pages have menus on the tabs. When you select a tab on a page, if a menu is available for the tab, an arrow displays on the tab.

Click the displayed tab once to open the menu and view the menu options.

The following illustration shows the open Team tab menu.



Chapter 2: Getting Started

This section contains the following topics:

Home Menu

The Home menu is the main menu for CA Clarity PPM users. The following illustration shows the Home menu expanded. To open and expand the menu, move the pointer over the menu name.

The menu options that appear on the Home menu depend on the rights granted to you. Menu selections can vary for each user.

The menu includes the following features:

Previous and Next

Scrolls to the right or the left when clicked. If the Next button is active (bolded), more menus appear to the right on the menu. If the Previous button is active, more menus appear to the left.

Set as Home

Sets the page currently open as your home page.

Reset Home

Resets the home page to the default home page, the *Overview* page.

Refresh

Updates the menu to include recent changes.

Set a Home Page

The default home page is the *Overview* page. You can make any page the home page.

Follow these steps:

1. Navigate to the page you want as the new home page.
2. Open Home and click Set as Home at the bottom of the menu.

To reset the home page to the default Overview page, open Home and click Reset home at the bottom of the menu.

View Your Information

To view your CA Clarity PPM information, open one of the following pages:

Overview

To view this page, open the Home menu and from Personal, click Overview.

Overview is the default home page. This page contains portlets that list your action items and notifications. This page also contains portlets to which you can add:

- Personal links for easy access to projects
- Pages inside CA Clarity PPM
- External internet addresses
- Favorite photos

For information about how to configure portlets, see the *Personalizing CA Clarity PPM User Guide.*

Organizer

To view this page, open the Home menu and from Personal, click Organizer.

This page contains detailed information about your action items, tasks, processes, and notifications.

How to Manage Your Assignments

As an application user, you use the product to manage your assignments. You can view, and update tasks and action items to keep your assignments status up-to-date.

A personal task is a work item for which you can log work in your timesheet and can track the progress.

An action item is a nontask that you assign to yourself, or others assign to you. An action item is an assignment that lets you select an option depending on the status of the work. You can use action items to track the progress of projects and to help ensure that a project is complete and on time.

A *process* is a series of actions (steps) in resulting in an end. Each step performs a single action that is intended to move the process toward its completion. The completeness of a process instance depends on the status of the steps it contains. When the Finish step is completed, the process instance ends.

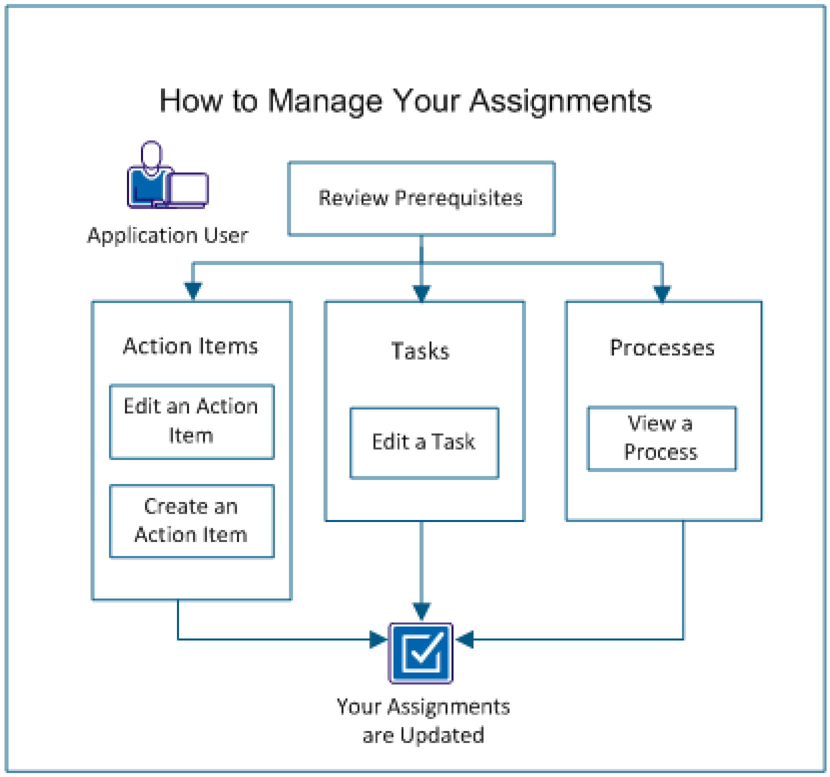
You can access your assignments from Overview or Organizer page. The Overview page is the default home page that contains configurable portlets with your action items, notifications, links. The Organizer page contains detailed information about your action items, tasks, processes, and notifications.

Note: For information about how to configure portlets, see the Personalizing CA Clarity PPM User Guide.

Prerequisites:

- Make sure that you can access the CA Clarity PPM user interface.
- To access the organizer page, make sure that you have the global right: 'Organizer – Access'.

The following process describes how an application user manages their assignments:



To manage your assignments, follow these steps:

1. Edit an Action Item (see page 18).
2. Create an Action Item (see page 19).
3. Edit a Task (see page 20).
4. View an Initiated or Available Process (see page 22).

Edit an Action Item

You are the owner of action items you create. As the owner, you can modify or delete an action item. You can modify the properties of a personal action item you create.

Note: For an action item assigned to you by another user, you can update *only* the status.

Follow these steps:

1. Open Home, and from Personal, click Organizer.
2. To update the status of an action item, select the status of the action item and Save.
3. Click the name of the action item.

4. Click Edit.
5. Edit the action item fields, and save.

   The changes to the action item are saved.

Create an Action Item

You can create both personal and project-related action items.

Note: For more information about project-related Management, see the *Project Management User Guide*.

Follow these steps:

1. Open Home, and from Personal, click Organizer.
2. Click New.
3. In the General section, complete the following fields:

   Subject

   Defines the name for this action item.

   Description

   Defines the description of the action item.

   Priority

   Specifies the priority level of the action item.

   Values: Low, Medium, or High

   Due Date

   Defines the date the action item is due for completion. If desired, select the hour and minute the action item is due.

   Recurring

   Indicates if the action item occurs at regular intervals. If the action item is to occur only once, clear this check box.

   Frequency

   Specifies how often the action item to reoccur.

   Example: Enter 1 in this field to create a status report each week.

   Units

   Specifies the time period during which the action item reoccurs.

   Values: Days, Weeks, Months, and Years

   Until

   Indicate the last date on which you want the action item to reoccur.

4. In the Notify section, complete the following fields:

   Notify Assignees

   Indicates if a notification is sent.

   Send Reminder

   Indicates if a reminder email notification is sent to the assigned resource (or resources) when the action item is due.

   Time Before Reminder

   Defines the amount of time before an item is due that the reminder occurs. For example, enter 15 in this field, and select Minutes in the Units field.

   Units

   If the Send Reminder check box is selected, this field specifies the unit of time for the reminder.

5. In the Assignees section, enter the name of the resource to assign the action item and save.

   Assign To

   Defines the name of the resource assigned to the action item.

   Default: The resource currently logged in.

Edit a Task

You can update a personal or assigned task to ensure that information about tasks is up-to-date.

Follow these steps:

1. Open Home, and from Personal, click Organizer.

   The action items list appears.

2. Click Tasks.

   The tasks list appears.

3. Click on a task that you want to update.

The following task properties appear. You can edit the appropriate fields as needed:

Task

Defines the name of the task. The value for the field is derived from the Name field on the task properties page. On list pages or in portlets, displays the name of the task. You can click the task name to open the task properties page.

Limits: 64 characters

Required: Yes

Investment

Displays the name for the investment. The value for this field is based on the Project Name field on the project properties page. Click this link to open the investment.

Start

Defines the date of starting the task assignment for a resource. The list pages or portlets display the start date.

Default: Task start date

Required: Yes

Note: Define the assignment to start on or after the task start date. If an assignment has actuals, the field is view only.

Finish

Defines the date of completing the task assignment for a resource. The list pages or portlets display the completion date.

Default: Task completion date

Required: Yes

Note: Define the assignment to finish on or before the task completion date.

Actuals

Defines the total work units that a resource has worked and posted to the task assignment.

Pending Actuals

Displays the number of hours entered by a resource on a submitted timesheet that is waiting to be posted.

ETC

Displays the estimated hours to complete the task. You can click in the cell to edit.

Assignment Status

Displays the status of the task. The value for this field is from the Status field on the task properties page.

Values:

- Not Started. No time is posted against the task.
- Started. Automatically changes the status to "Started" when time was posted against the task.
- Completed. Automatically changes the status to "Completed" when the task ETC has zero hours and the task status is updated to "Completed".

4. Click Save.

   Your updates are saved.

View an Initiated or Available Process

You can filter and view a list of initiated or available processes. From a list, you can do the following:

- For initiated processes, you can view the status or click a process link to view the step details.
- For available processes, you can start a process or click a process link to edit its definition. You can also create new processes.

Note: To view a list of all available global processes, process administrator access is required.

Follow these steps:

1. Open Home, and from Personal, click Organizer.
2. Click Processes.
3. Expand the Processes menu, and click Available or Initiated.

   A list page with initiated or available processes appears.

Notifications

A notification can be an alert, an email, or an SMS message that notifies you of new activities or changes in CA Clarity PPM. The alerts that you can see are for your assigned action items or overdue timesheets.

Alert notifications appear in the following locations:

- Overview page on the Notifications portlet
- Organizer page on the Notifications tab

Open an Action Item from Notifications

The following procedure explains how to open an action item from the notification list. You can delete notifications that you no longer need.

Follow these steps:

1. Open Home, and from Personal, click Organizer.

   The action items page appears.

2. Click Notifications.

   The notifications list appears,

3. Click the link in Message column or the Properties icon that displays next to the alert notification.

Favorites

The Favorites menu lets you store a link to any page as a favorite for easy access at any time. Favorites is a personal menu that you can use to store the links you use every day.

Save a Page as a Favorite

You can save any page as a favorite.

Follow these steps:

1. Open the page to save as a favorite.
2. Open the Favorites menu, and click Add Current.

Add a Favorites Page Link

Follow these steps:

1. Open Favorites, and click Configure.
2. Click Add.

   The create page appears.

3. Select Page Link and click Next.

   The menu item properties page appears.

4. Complete the following fields, and save:

   Link Name

   Defines the label for the page link that appears in the menu.

Description

Defines the purpose for the section or page link.

Page Name

Specifies the page that appears when the link is clicked.

Parent Menu Item

Specifies the menu section in which the link appears.

Add a Favorites Action Link

Use this procedure to add an object action that performs a task to the Favorites menu.

Follow these steps:

1. Open Favorites, and click Configure.
2. Click Add.

   The create page appears.
3. Select Action Link and click Next.

   The menu item properties page appears.
4. Complete the following fields:

   Link Name

   Defines the name of the link that performs an action. This is the label for the link that displays in the menu.

   Description

   Defines the purpose of the link.

   Action Name

   Specifies the action that occurs when the link is clicked in the menu.

   Parent Menu Item

   Specifies the section in which the link appears.
5. Click Save and Return.

Add a Favorites Menu Section

Follow these steps:

1. Open Favorites, and click Configure.

2. Click Add.

   The create page appears.

3. Select Section and click Next.

   The menu item properties page appears.

4. Complete the following fields:

   Section Name

   Defines the name for the section.

   Section ID

   Defines the unique identifier for the section.

   Description

   Defines the purpose for the section or page link.

5. Click Save and Return.

Reorder Menu Sections

Use this procedure to reorder sections and links in the Favorites menu.

Follow these steps:

1. Open Favorites, and click Configure.
2. Click Reorder.

   The reorder menu page appears.

3. In the Menu Items list box, select a section and click the up or down arrows to move the section to a new position.
4. Save the changes.

Note: If you don't see your changes reflected in the menu, click the Refresh button.

Remove a Menu Section or Link

Use this procedure to remove a menu section, page link, or action link. You can only remove sections or links that you have created. You cannot remove CA Clarity PPM default sections or links.

Follow these steps:

1. Open Favorites, and click Configure.

2. Select the check box next to the section or link to delete, and click Remove.

   The confirm menu item delete page appears.

3. Click Yes.

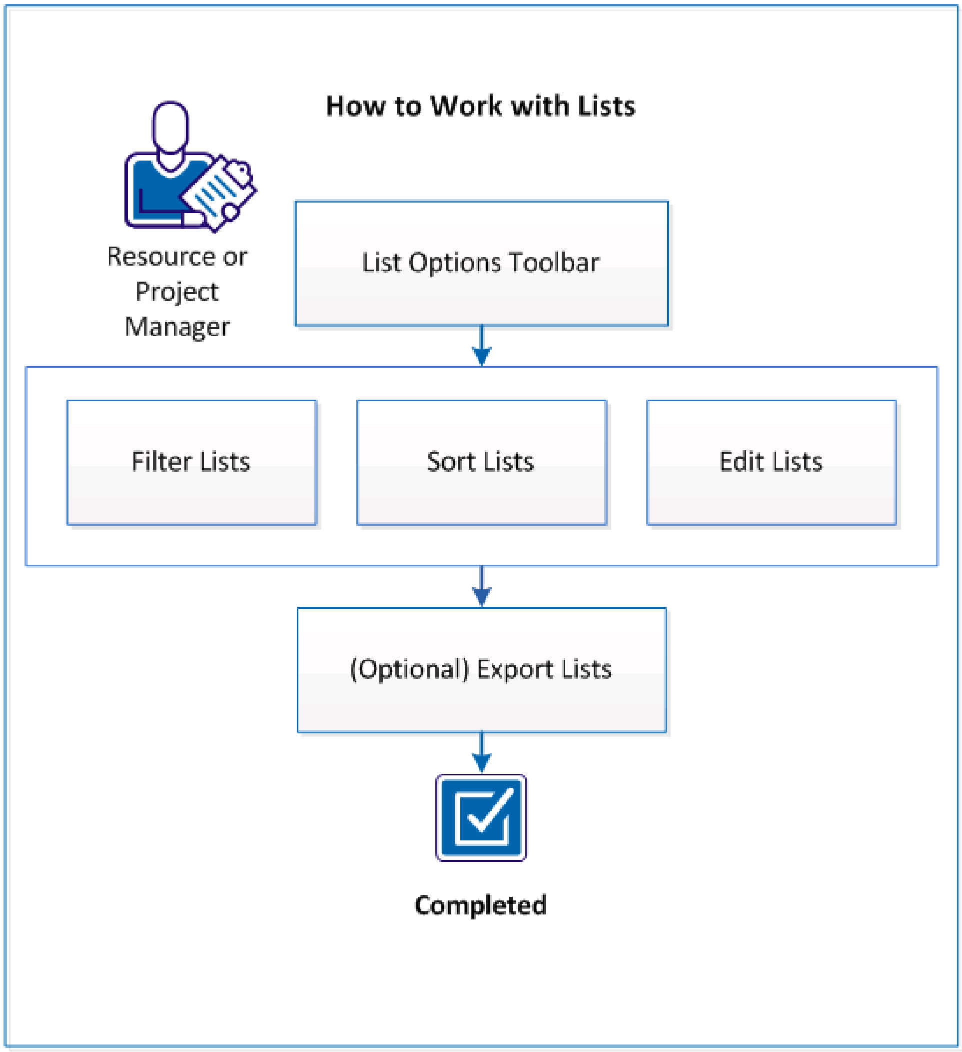
Chapter 3: Page and Portlet Basics

This section contains the following topics:

How to Work with Lists

As an application user, you use CA Clarity PPM to work with lists that relate to your projects. Lists can be very long, so you can filter the list to view only what you want, sort the list to see the items in the order you want, edit the lists to update and correct information, and export lists to view and work with them in Excel.

The following process describes how an application user works with lists and filters:



Follow these steps:

1. List Options Toolbar (see page 29).
2. Filter Lists (see page 30).
3. Sort Lists (see page 32).
4. Edit Lists (see page 33).
5. Export Lists (see page 34).

List Options Toolbar

The Options toolbar displays at the top of lists. The toolbar options help you manage the information included in lists.

- Filter option
- Options menu (expanded)

The toolbar options let you do the following:

Filter

Lets you filter the list with criteria you select. You can expand or collapse the filter by double-clicking the toolbar or by clicking the icons (+ or -) that appear next to the filter name. The filter in use is listed in the filter field. To see a list of saved filters, click the down arrow. For more information about filters, see Filter Lists (see page 30).

Options Menu

Lets you access options that apply to the portlet being viewed. The options that appear can vary depending on the portlet. The following list shows some of the menu options that can appear on the Options menu.

Configure

Lets you do the following:

- Modify the list and filter fields.
- Modify the list and filter layout.
- Aggregate the information in columns
- Set options for how the list displays.
- Define the display settings for a Gantt chart.
- Define the time period settings for a time-scaled value.

Note: For information about settings for Gantt charts and time-scaled values, see the *Personalizing CA Clarity User Guide*.

Multisort

Lets you sort the information in a list using multiple columns. For more information about sorting, see Sort Lists (see page 32).

Export to Excel (Data Only)

Exports the list to Microsoft Excel. No charts are included in this export. For more information about exporting, see Export Lists (see page 34).

Note: Some lists display a Configuration icon in the Options toolbar. For these lists, you can set items that are selected from the list to display in a separate pop-up that floats above the workspace. The pop-up has the same functionality as a page presented in the workspace.

Filter Lists

Lists with many items can span multiple pages. Use the filter fields to filter the list to only those items you want to view.

Use the Expand/Collapse Filter icon on the Options toolbar to hide or display the filter. When a list is filtered, you can return to the default results list and view all the items in the list page. Click Show All or select System Default from the Filter drop-down.

You can name a filter and save the criteria for later use. Access saved filters from the Filter drop-down.

Note: Filter fields are not case-sensitive.

Follow these steps:

1. Open the list page.
2. Click the Expand Filter icon at the top of the list if the filter is not open.
3. Enter filtering criteria in the filter section of the page, and click Save Filter.
4. Enter a name for the filter.
5. To make this filter the default filter for this list page, select Default.
6. Click Save and Return.

   You created a filter that is available from the filter drop-down.

Note: When you apply a filter to a hierarchical list, the expanded items collapse. The resulting filtered items include its parent and up the hierarchy to the top-level item, and all rows display collapsed.

Build a Power Filter

A power filter is a custom filter that searches a list page by criteria you define. Use a power filter alone or with other filter fields on the list page. Only one power filter can be created for a list page.

You design and build a power filter using an expression that is divided into two parts, left and right, and separated by an operator, such as, =. For example, the expression to search for all active projects on the projects list page appears in the Expression text box as the following:

```
project.is_active == 1.
```

Follow these steps:

1. With a list page open, expand the filter.
2. Click the Build Power Filter link in the filter section.
3. Build the left part of the expression by completing the following fields:

   Note: The available fields are dependent on the page displayed.

   Object

   Specifies the type of object to filter. The page refreshes.

   Field

   Specifies the field to display in the Filter section. The page refreshes.

4. Select one of the following operators:

   Note: The operators that are available are dependent on the object and field values that are used for the left part of the expression.

   - =
   - !=
   - >
   - >=
   - <
   - <=

5. Complete the following fields to build the right part of the expression:

   Note: The fields that are available are dependent on the page displayed.

   Constant

   Specifies the constant for the field.

   Values: Yes or No

   Example: Select the Active field of the project object and use the equals operator, then select Yes as the constant. This combination finds all active projects.

   Object

   Specifies the type of object to filter. The page refreshes.

   Field

   Specifies the field to display in the Filter section. The page refreshes.

6. Click Add.

   The expression appears in the Expression field.

7. Select a value from the following field to create an equation with multiple clauses. For example, you can create a power filter with multiple clauses to display all active projects that are also assigned to a specific department. If you select a value from this field, create the additional clause for the expression and click Add. This action appends the clause to the value in the Expression field.

   And/Or

   Specifies the equation type for the second half of the expression.

   And

   Defines an equation with multiple clauses.

   Or

   Defines an either/or equation.

8. Do one of the following:
   - Click Evaluate to evaluate the syntax of the expression. If the syntax is not valid, INVALID appears above the expression text box.
   - Click Add Parenthesis to surround the expression with parentheses.
   - Click Negate Expression to negate the expression by surrounding the expression with parentheses and preceding it with an exclamation point.
   - Click Clear to clear the expression text box.

9. Save the changes.

   The power filter is saved. The name appears in the Power Filter field of the page filter.

Sort Lists

You can sort lists by row or column to view the items in the order you want. Once the list is sorted, you can reset the sort to the default sort order. You can sort parent items in lists. When the list is sorted, the child items inherit the sorting criteria of the parent.

To sort a column, click the column header. When the list is sorted, an arrow appears in the column header. To reverse the sort order, click the column header again. Do the same to sort by any other column headers.

Use the Multisort option to change the sort order of columns or sort by multiple columns to change your page layout.

Follow these steps:

1. Open a list page.
2. Open the Options menu by clicking the icon on the Options toolbar, and select Multisort.

   The sort by multiple columns page appears.

3. Complete the following fields, and save:

   First Field

   Specifies the column that leads the sort order.

   Type: Text

   Displays information in alphabetical order.

   Type: Numbers

   Displays information in numerical order.

   Second Field

   Specifies the column that defines the second order of the sort.

   Third Field

   Specifies the column that defines the third order of the sort.

   Fourth Field

   Specifies the column that defines the fourth order of the sort.

4. For each selection you make in a Column field, indicate the direction of the sort for that column: ascending or descending.

   You sorted a list.

Edit Lists

When you click in a field to update, the entire list is placed into edit mode. Use the edit feature to update and correct fields in a list. You can click links and icons in other fields while the list is in edit mode. A flag appears in the field to indicate an unsaved update. Press the Esc key on your keyboard to return to display mode and discard unsaved changes.

Note: If the field can be edited, the field changes to edit mode. If no action occurs, the field cannot be edited.

In addition to editing lists, you can insert an item.

Note: If the list includes a time-scaled value column and you want to edit the time-scaled information, save your changes first.

Follow these steps:

1. Open a list page.
2. Select the check box or click anywhere on the item row to insert a new row below it.
3. Click New.
4. Edit fields and save.

   The new row is inserted with the updated fields.

   Note: Fields that are displayed are required.

Export Lists

You can export the information from any list portlet that displays the Export to Excel (Data Only) icon on the Options toolbar. Exporting to Excel is especially helpful when the list extends over multiple pages. To use statistical operations such as SUM and AVERAGE, export and view the list in Excel format.

Note: If the Export to Excel icon is not displayed, the list is restricted.

The following rules apply when you export information in a list:

- You can run only one active export at a time.
- If you apply filter criteria, only the filtered results are exported.
- Only first-level items are exported.
- Only the fields that are displayed in the list are exported.
- Only the items that are listed on the page are exported. If you have more than one page, export these pages independently.
- For items that contain charts (including Gantt charts), you can export a maximum of 300 items.
- You can export an unlimited number of items without charts.Use the Export to Excel (Data Only) option, and leave the Maximum rows for Export to Excel field empty.

- The exported information appears in Excel or PowerPoint the way that the information appears in CA Clarity PPM.
- You can export some CA Clarity PPM pages that contain portlets, like the overview page. If you can export a page of portlets, the export option is available.

Important! Expect certain changes in how information is displayed in Excel when you export CA Clarity PPM information to Microsoft Excel.

Before you export information, verify that you are exporting the returned results and have not applied any pagination.

Follow these steps:

1. With a list page open containing the information for exporting, click the Export to Excel icon.

   The file download page appears.

2. Open the list as an Excel spreadsheet, or save it to your local desktop.

   You exported a list to be able to and work with it in Excel.

Present a Page as a Pop-up

Some lists display a Configuration icon in the Options toolbar. For these lists, you can set items selected from the list to display in a separate pop-up that floats above the workspace. A pop-up is one way to provide a visual reminder of where you are in the application. The popup has the same functionality as a page presented in the workspace.

Note: When you set an item on a list page to appear in a pop-up, all list items are set to appear in a pop-up.

Follow these steps:

1. Open the list page you want to configure.

   For example, to open the Projects list page, open the Home menu, and from Portfolio Management, click Projects.

2. Open the Options menu by clicking the icon on the toolbar, and click Configure.
3. Open the List Column Section menu, and click Fields.
4. In the Attribute column, locate the Name attribute, and click the Properties icon.
5. Select the Open as Pop-up check box, and click Save and Return.
6. Click Return.

   The pop-up setting is complete. Any item you click in the list appears in a separate pop-up window.

Charts

You can use the three-dimensional and animation charting capabilities to organize and visually represent complex information. With charts, you can do the following:

- Mouse over data points to view additional information about dimension values and metrics.
- Drill down to view details on a data point on the chart.
- Slice a pie or funnel chart to call out information.
- Assign colors and change X and Y-axis labels.

You can display charts from any portlet page, such as the overview page or dashboards. You can add charts by personalizing pages or your CA Clarity PPM administrator can add charts using Studio.

For more information, see the *Personalizing CA Clarity PPM User Guide*.

For more information, see the *Studio Developer's Guide*.

Set Chart Options

You can print, slice, or rotate charts by setting chart options.

Right-click a chart to set the following chart options:

- Print. Prints the chart.
- Slicing. Extracts slices from a pie or funnel chart. Slicing is the default setting.
- View 2-D. Temporarily changes to a two-dimensional view of the chart. When you leave the chart portlet page and return, the chart view is three-dimensional.

The following table describes the available options for each chart.

Chart Type	View 2-D	Slicing	Rotation
Area	Yes	No	No
Bar	No	No	No
Bubble	No	No	No
Column	Yes	No	No
Funnel	Yes	Yes	No
Line	Yes	No	No
Pie	Yes	Yes	Yes

Scatter	Yes	No	No

Chapter 4: Personal Dashboards

This section contains the following topics:

About Personal Dashboards

You can create personal dashboards that display the specific information you want to see. You can create custom portlets to use in a personal dashboard, or if you have the appropriate access rights, you can use stock portlets.

For more information, see the *Personalizing CA Clarity PPM User Guide*.

You can also view dashboards that other users have shared with you.

You can export the contents of a dashboard or an individual portlet displayed in the dashboard to Microsoft Excel or PowerPoint. The maximum size for Export to Excel or Export to PowerPoint is 300 records. If you use the Export to Excel (Data Only) option, there is no limit to the number of records that can be exported.

Note: You cannot export interactive portlets. These portlets are HTML portlets and cannot be exported.

You can fit the exported information to a page. This option is helpful if you are exporting information to PowerPoint for a presentation. You can also elect to place each exported portlet on a separate page. This approach avoids having all portlets fitted onto a single page as they might appear in a dashboard.

View a Dashboard

Follow these steps:

1. Open Home, and from Personal, click Dashboards.

   The dashboard list page appears showing dashboards created by you or shared with you by other users.

2. Do one of the following to view a dashboard:

   - Click the icon next to a dashboard in the list.
   - Click the name of a dashboard to open the details page, and from the Actions menu, click View Dashboard.

Export a Dashboard

A dashboard can be exported from the details page, or from a dashboard displayed for viewing.

If you are exporting a chart portlet, the chart displays in native Microsoft Office chart format.

Follow these steps:

1. Open Home, and from Personal, click Dashboards.

   The list page appears.

2. Click the name of the dashboard you want to export.

   The details page appears.

3. In the Export field, select the appropriate check boxes to indicate how you want the portlets to appear in Excel or PowerPoint.

   - To fit all exported portlets on a single sheet or page, verify that both check boxes are clear. If you are exporting to PowerPoint, some portlets can be truncated if the number of portlets is larger than the PowerPoint page can accommodate.
   - To export each portlet to a separate page with the current dashboard size, select One Page per Slide/Sheet.
   - To export each portlet to a separate page and fit the portlet to the page, select both One Portlet per Slide/Sheet and Fit to Page.

4. Open the Actions menu and click Export to Excel or Export to PowerPoint.

   The File Download dialog appears.

5. Click Open to display the file without saving, or click Save to save the file.

Export a Portlet

Display the dashboard for viewing to export an individual portlet. Some stock portlets are restricted and cannot be exported. If a portlet is restricted, the Export to icon for exporting does not appear in the Options toolbar.

Follow these steps:

1. Display the dashboard to view the individual portlets.
2. On the portlet you want to export, open the Options menu on the portlet toolbar and *select on*e of the following options:
   - Export to Excel. This option exports the portlet information to Excel, including any portlet charts.
   - Export to Excel (Data Only). This option exports the portlet information to Excel but does not include charts.
   - Export to PowerPoint.This option exports portlet information to PowerPoint, including any portlet charts.

   The File Download dialog appears.
3. Click Open to display the file without saving, or click Save to save the file.

Chapter 5: Viewing and Posting Discussion Topics

Users with the appropriate access rights can access Discussions from within certain objects. Discussion allows its users to post discussion topics and reply to topics and messages.

This section contains the following topics:

About Discussions

Use the Discussion feature to exchange ideas and communicate in a common location on subjects relevant to the participating resources. This feature is available from the following locations:

- Projects and Programs
- Requisitions

  For more information about managing resources, see the *Resource Management User Guide*.

Requires specific access rights to use discussions from the locations.

For more information, see the *Project Management User Guide*.

Discussion Terminology

The following provides definitions of the standard message board terms you see when using discussions:

Topic

A topic is the top-level grouping for a message. Topics consist of a topic name (subject) and participants. Each topic can contain any number of threads.

Thread

A thread consists of a message and all of the responses to it.

Message

A message is the conversation part of a thread.

Reply

A reply is a response to a message, or to another response.

Open a Discussions List Page

You can open the list of discussion topics for a program or a project. Access to the discussion list for a project or program is required to open and view it.

Follow these steps:

1. Do one of the following:
   - Open Home, and from Portfolio Management, click Programs.
   - Open Home, and from Portfolio Management, click Projects.

   The list page appears.
2. Click the name of the program or project.

   The properties page appears.
3. Click Collaboration.
4. Open the Collaboration menu and click Discussions.
5. The list of discussion topics appears.

Create a New Discussion Topic

Only users who are collaboration managers can create new discussion topics. By default, the user who creates projects or programs is the collaboration manager. Additional collaboration managers can be designated.

An author cannot change topic or message content once it is posted. Only resources who are collaboration managers for the specified investment can delete discussion topics and messages.

For more information, see the *Project Management User Guide*.

Follow these steps:

1. Open the discussions list page for the project or program.
2. Click New.

   The properties page appears.

3. Complete the following fields, and save:

   Topic Name

   Defines the name of the topic.

   Access

   Specifies the access applied to this discussion. To grant discussion access to all of the project or program participants, click All Resources/Groups.

   Default: All Resources/Groups

   Selected Resources/Groups

   Specifies the individuals who can participate in the discussion.

Post a Message to a Discussion Topic

Follow these steps:

1. Open the discussions list page for the project or program.
2. Click the name of the topic to which you want to respond.

   The messages page appears.

3. Click New.

   The properties page appears.

4. Complete the following fields:

   Subject

   Defines the subject of the message.

   Message Text

   Defines the text of the message.

Access

Defines the resources having access to the message.

Values:

- All Resources/Groups. Select this option to add all of the project participants.
- Selected Resources/Groups. Select this option to locate and add specific individuals to the discussion.

Default: All Resources/Groups

Attach a Document

Defines the path of the document to attach to the message.

Notify Participants

Specifies if you want the discussion recipients to receive an email notification when a new message arrives for their review.

Default: Selected

5. Save the changes.

   The message displays in the list messages page beneath the topic name.

Post a Reply to a Message

Follow these steps:

1. Open the discussions list page for the project or program.
2. Click the name of the message to reply.

   The replies page appears.
3. Click New.

   The properties page appears.
4. Complete the following fields:

   Subject

   Defines the subject of the message.

   Message Text

   Defines the text of the message.

   Attach a Document

   Defines the path of the document to attach to the message.

Notify Participants

Specifies if you want the discussion recipients to receive an email notification when a new message arrives for their review.

Default: Selected

5. Save the changes.

   The message you created displays in the replies list. Click the name of the subject to open and read it.

6. To return to the original message or to return to the list of topics, click the appropriate link at the top of the list.

Expand or Collapse a Discussion Thread

You can expand a thread to view all of the replies to a message and collapse it back to the message level.

Expanding a thread

When you expand a thread, you can see the expanded view of the message you selected. To expand a thread, select the message or reply whose contents you want to view, and click Expand.

Collapsing a thread

When you collapse a thread, the message or reply displays only its subject line. To collapse a thread, select the message or reply whose contents you want to collapse, and click Collapse.

Chapter 6: Documents and Folders

You can access and manage your documents from two repositories:

- The Knowledge Store
- Document Manager

This section contains the following topics:

Document Repository Overview

Your administrator maintains the Knowledge Store and Document Manager. These repositories contain documents on policies or procedures that pertain many people.

You can use the Knowledge Store for saving and accessing your generic documents. You can use Document Manager to do the following:

- To build a repository for project-related forms and documents
- To build a repository for program-related forms and documents
- To attach documents, such as a resume or an application form, to a resource profile

Though most users can access these repositories, their access to the folders and documents within it vary. With the appropriate permissions, users can create new folders, add documents to them, and edit both documents and folders. Key differences exist in the access rights of the two repositories.

Knowledge Store Access Rights

Access to the Knowledge Store and to its folders and documents are provided at the following levels:

- Access rights at the Knowledge Store level
- Permissions at the folder and document levels

The following rights to access are required to manage or view content in the Knowledge Store:

Knowledge Store - Administrate

Allows you to access all of the folders and documents in the Knowledge Store. Only users with the Knowledge Store - Administrate access right can create folders at the top level of the Knowledge Store folder tree. Users with the Knowledge Store - Access right and with the appropriate permissions can add sub folders and documents to the folders.

Knowledge Store - Access

Allows you to create, edit, and view documents and folders in the Knowledge Store to which you have access. Allows you to delete the folders you created, and the documents you added.

Knowledge Store - View All

Allows you to view all documents in the Knowledge Store.

Knowledge Store and Document Manager Permissions

The CA Clarity PPM administrator grants Knowledge Store access rights. Access to folders and documents are granted on a case-by-case basis. When you create or administer a folder or document, identify the users who need access to the folder or document. Then, give the users permission to read, read/write, or read/write/delete on the folder or document. The permission level determines the actions users can take on a folder or document.

The following table describes the permissions required for the Knowledge Store or Document Manager.

Permission	Description
Read	You can do the following: ■ Open current and prior versions of a document ■ Check out current and prior versions of a document
Read/Write	You can do the following: ■ Open, read, copy, and move documents ■ Check in or check out documents ■ View checkin/checkout history ■ View document versions ■ View and modify document properties ■ View and modify document permissions ■ Attach processes for documents ■ Add new folders and documents

Permission	Description
Read/Write/Delete	You have all the read/write permissions, plus you can move and delete documents and folders.

All Document Manager participants are automatically given the read permission. The project manager, the program manager, the resource manager, or CA Clarity PPM administrator grants the other permissions.

View the Knowledge Store

You can view folders to which you have access using the Knowledge Store page.

Note: If you do not see the Knowledge Store link, you do not have access to the Knowledge Store. See your CA Clarity PPM administrator for access.

Follow these steps:

1. Open Home, and from Organization, click Knowledge Store.

   The Knowledge Store page appears.

2. Click the folder name.

   This action expands the folder tree so you can see the subfolders and documents beneath it.

View the Document Manager

The following procedures show how to see documents related to a specific project, program, or resource.

Project

Follow these steps:

1. Open the Home menu, and from Portfolio Management, click Projects.

   The list page appears.

2. Click the name of the project to view the Document Manager.
3. Click the Collaboration tab.

   The Document Manager page appears for the project.

Program

Follow these steps:

1. Open the Home menu, and from Portfolio Management, click Programs.

   The list page appears.

2. Click the name of the program to view the Document Manager.
3. Click the Collaboration tab.

   The Document Manager page appears for the program.

Resource

Follow these steps:

1. Open the Home menu, and from Resource Management, click Resources.

   The list page appears.

2. Click the name of the resource to view corresponding documents.
3. Click Document Manager.

   The Document Manager page for the resource appears.

Folders

Folders can stand alone and contain documents, or a folder can serve as a top-level folder that contains subfolders. Both top-level folders and subfolders can contain documents.

To view the list of folder actions, from a Knowledge Store or Document Manager page, click a folder Actions menu. Your access rights and permissions determine the actions that display.

If you do not have the appropriate access for a particular action, the action does not appear in the Actions menu for that folder.

Create a Folder

You can create subfolders for a top-level folder, and subfolders for a subfolder. When you create a subfolder, the application automatically gives read/write access to that subfolder to those resources you selected at the top level. These resources are named participants. You can select individual resources from the existing participant group and give access to additional users.

Follow these steps:

1. Open the Knowledge Store or the Document Manager page for a specific program, project, or resource.
2. Select New Folder from the folder Actions menu.

   The properties page appears.
3. Complete the following fields:

   Folder Name

   Defines the unique name for the folder.

   Access

   Defines the resources who have access to this folder. Select additional resources from a list of resources to which you have access. You can also remove an existing resource.

   Resources are automatically grouped as participants. You to grant them access to any of its subfolders as a group.

   Allow Non-participants to Access Folder

   Indicates if users not assigned to the project have access to project documents.
4. Click Save and Return.

Add a Document to a Folder

You can add a maximum of five files to a folder at one time. If you are adding files from a page in the Document Manager, choosing Add Documents from the folder Actions menu opens the add multiple documents page.

Follow these steps:

1. Open the Knowledge Store or the Document Manager page for a specific program, project, or resource.
2. Open the Actions menu, and click Add Documents from the folder.

   The Add Documents page appears.
3. Edit the following fields:

   Select Files

   Specifies the files are adding to the folder. At each field, click the Browse icon to attach a file.

   Limits: Five files at one time

   Status

   Indicates if the documents are Approved, Rejected, or Submitted.

Category

Defines the document category. For example, select Proposal from the drop-down if the document is a proposal.

Date Created

Defines the document creation date. The date can be an actual creation date or the date you add the file to the folder.

Access

Indicates the type of access for this folder

Values

- All Participants. Indicates granting read/write access to this folder to all participants in the group.

Select Participants. Indicates that individual resources are from the existing participant group.

Default: All Participants selected.

Allow Non-participants to Access Folder

Indicates if users not assigned to the project have access to project documents.

Enable Check Out

Indicates if resources with appropriate access can check out and edit the file.

Enable Versioning

Indicates resources with appropriate access can create another version of the file.

Notify Resources/Groups

Indicates if resources who have access to the files are notified when documents are added.

Description

Defines the description of the files.

Comments

Specifies any comments about the files.

4. Click Add.

The selected documents are added to the folder.

Download Files from Folders

Use the Download All or the Incremental Download option to download files from a selected folder to a local zip file. The absence of these options on the Actions menu implies that you do not have the required permissions to perform the action.

You can download:

- All the files and subfolders in a selected folder
- A subset of files from the selected folder. The subset includes those files that have changed since you last downloaded and those not yet downloaded.

The zip file name is the name of the folder by default. You can select where to download the file. When you download files from a folder, the file structure is not maintained in the saved zip file.

Important! Enable the Enable Document Download setting before downloading files.

For more information, see the *Administration Guide*.

Download All Files

Use the following procedure to download all the files selected, including files in subfolders.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Select Download All from the folder Actions menu.

   The File Download window opens.

   If the size exceeds the maximum for download set by your administrator, download a subset of files from the folder.
3. Click Save to save the zip file to a location on your computer.

   The Save As dialog opens.
4. Select the location, and click Save.

   The zip file is saved to the specified location on your computer.

Download Files Incrementally

Use the following procedure to download a subset of files from a selected folder. The zip file includes only files that have changed since you last downloaded them and files not yet downloaded.

The file structure is not maintained in the saved zip file.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Open the folder Actions menu, and click Incremental Download.

   The File Download window opens.

   If the size exceeds the document download maximum set by your administrator, download one file at a time.
3. Save to save the zip file to a location on your computer.

   The Save As dialog opens.
4. Select the location, and click Save.

   The zip file is saved to the location specified on your computer.

Edit Folder Properties

Follow these steps:

1. Open the Knowledge Store or the Document Manager page for a specific program, project, or resource.
2. Select Properties on the Actions menu of the folder to edit.
3. Edit the following fields, and save:

   Folder Name

   Defines the unique folder name.

   Owner

   Defines the owner for the folder.

   Access

   Defines the level of folder access.

   Options:

   - All Participants. Indicates if read/write access is given to the participant group created when the top-level folder for this subfolder is created.
   - Select Participants. Indicates if individual resources are selected from the existing participant group.

Edit Folder Permissions

When you add resources to a folder, they are automatically grouped as participants with read/write access to this folder. The user who creates the folder is automatically given read, write, and delete access to the folder. You can change the permissions at any time.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Open the Actions menu, and click Permissions.

   The permissions page appears.
3. Select the permission you want to allocate to each resource.
4. To allow a resource to transfer the rights to any documents and subfolders in the current folder, select Cascade Permissions.
5. Save the changes.

Documents

While you can check out a document to edit it, you can also open it in read-only mode for viewing purposes only.

To view a document, select Open from the document Actions menu, and click Open when prompted on the File Download window. This option restricts your access to read-only for the document.

To save a document to your computer, select Open from the document's Actions menu and click Save when prompted on the File Download window.

This option restricts your access to read-only for that document, just as opening the document for read-only restricts your access. To edit the document and save it back to the application, check out the document.

Check Out Documents

To edit a document, check it out of a folder. When you are finished, check the document back in. If document versioning is enabled, another version of the document is created automatically.

Other users cannot edit a checked-out document until you check it in. Enable the document for checkout before you can proceed.

Check Out

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Check Out.

   The File Download windows appears.
3. Save the document to your desktop, and select a location for the file.
4. Click OK.

Undo Checkout

Only the user who checked out the document originally can undo a checkout. Performing this action unlocks the document, allowing others to check out the document.

Select Undo Check Out from the document Actions menu to undo a document check-out status.

Check In

Click Check-in from the document Actions menu and browse for the updated copy in the location selected when you checked out the document.

Copy a Document

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document to copy to a different folder, and from the document Actions menu, click Copy.

   A page appears for selecting the destination folder.
3. In the Select Placement section, select the destination folder.
4. Select the Notify Resources/Groups check box for users with access to this document notified about the copy action.
5. Click Copy.

Edit Document Properties

The user who added the document can update the document properties.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Properties.

   The properties page appears.
3. Edit the available fields, and save.

Edit Document Permissions

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, Permissions.

   The permissions page appears.
3. Select the permission to allocate to a resource.

   Values include Read, Read/Write, and Read/Write/Delete.
4. Save the changes.

Review Document History

The Document History page lists the names of the users who have accessed the document and the date and time of their most recent visit.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click History.

   The history page appears.
3. Click Return when done.

Move a Document to a Different Folder

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Move.

   A page appears for selecting the destination folder.
3. Select the folder to move the document to.
4. Click Move.

Work with Document Versions

Use document versioning to save a separate version of a document each time you check it in. To use document versioning, enable the document for versioning.

Open Previous Document Versions

You cannot modify a previous version of a document, but you can open and view it.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Versions.

   The document versions page appears and lists all the versions of the document.
3. Open the document version Actions menu, and click Open.

   The file download window appears.
4. Click Open.

Copy a Document Version to a Different Folder

You can copy a specific version of a document to a different folder. If you do this, you require revising the document permissions after copying it.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, from the document Actions menu, click Versions.

   The document versions page appears and lists all the versions of the document.

3. Open the document version Actions menu, and click Copy.

   The copy document page appears.

4. Select the folder to copy the document to, and click Copy.

Work with Document Processes

If your CA Clarity PPM administrator has created document-related processes, they are listed on the available processes page. Document processes can be effective when routing a document through an approval process. Processes are effective because a document process can link to any associated project or program. You can send notifications and action items from the document process to the project roles and resources.

Note: See the *Administration Guide* for more information.

The initiated processes page of document lists the in-progress or completed processes. To view the page, open the Knowledge Store, and from the document Actions menu, click Processes.

The steps for starting, stopping, and deleting document processes from a Document Manager page are similar to the steps described in this section.

Start a Document Process

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Processes.

   The list of initiated processes appears.

3. Click the Available tab.

   The list page appears.

4. Select the process to start, and click Start.

Cancel a Document Process

The initiated processes page of document lists the in-progress or completed processes. To stop a document process, select the process to stop, and click Cancel Process. The application stops the process.

Delete a Process

You can delete completed or canceled processes but not processes that are running.

Follow these steps:

1. Open the knowledge store or the document manager page for a specific program, project, or resource.
2. Locate the document, and from the document Actions menu, click Processes.

   The list of initiated processes appears.

3. Click the Available tab.

   The list of available processes appears.

4. Select the process, and click Delete.

   A confirm process instance delete page appears.

5. Click Yes to confirm the deletion.

Chapter 7: Global Search Tool

This section contains the following topics:

About the Global Search Tool

The Global Search tool appears on the global toolbar. Use the global search field to perform a simple global search to look for specific documents and forms. Use the Advanced link to perform an advanced search to set additional search criteria to refine your search results.

You can search for information saved in the application at any time. However, by default, five minutes to elapse before new information can be searched. The amount of time is determined and can be changed by your administrator.

For more information, see the *Administration Guide*.

Perform a Basic Search

To perform a basic search, click the Search icon and enter all or part of the term, then click Search. The search results page appears displaying a list of all items that match the criteria specified. It the list contains only items you have the right to view.

Keep in mind these guidelines when entering terms in the global search field:

- To perform a wildcard search, enter all or part of the search criteria. You do not need to append your entry with a wildcard character (*). Basic search is not case-sensitive. For example, the entries Orange, orange, and ORANGE all return the same results.
- If you enter the search phrase, Resource Profile List*,* without quotations, the application searches for items that contain any of these words in any order. However, if you enter the search phrase in quotation marks ("Resource Profile List"), only instances of the exact string are returned.
- Do not use the following characters in basic searches:

  @ = [] {} <>

Perform an Advanced Search

Use the Advanced Search page to set additional criteria to refine your search results.

Use the fields and options on the page to narrow your search. You can search according to one or any combination of the criteria. Search results display only for those items you have permissions to view or edit.

Follow these steps:

1. On the global menu, click the Search icon, then click the Advanced link.

   The Advanced Search page appears.

2. In the General section, enter the following:

   Text

   Defines the text to search. To perform a wildcard search, enter an asterisk (*) at the end of the text. Searches are not case-sensitive.

   Mode

   Specifies the mode of searching.

   Values: All Words, Any Words, or Exact Phrase

   Owner

   Specifies the owner type.

   Values: All Owners or Selected Owners

   Created Date

   Defines the date of creating the item being searched. You can enter a range of From Date and To Date.

   Modified Date

   Defines the date of modifying the item being searched. You can enter a range of From Date and To Date.

3. In the What to Search section, enter the following:

   Documents

   Specifies the type of document being searched.

   Values: All, None, or a specific type

   Include File Contents

   Indicates if the search results include the document contents.

   Include Prior Versions

   Indicates if the search results include a prior version of a document.

Action Items

Indicates if the search results include action items.

Discussions

Indicates if the search results include discussions.

4. In the Where to Search section, for Areas to Search, select the check box of each CA Clarity PPM module. For example, Knowledge Store or Resources.
5. Click Search.

   The search results page displays a list of all items that match the criteria you specified. Only items that you have the right to view appear in the results.
6. Do one of the following:
   - To perform another advanced search, click Revise Search.

     The advanced search page appears where you can revise the fields.
   - To return to the Overview: General page, click Return.

Global Search Techniques

Use the following techniques for performing global searches:

- Wildcard characters
- Boolean operators
- Subqueries

Use Wildcard Characters in a Global Search

With the Global Search tool, you can perform single and multiple character wildcard searches. Do not use the "*" or "?" symbols as the first character of a search.

Single Character Wildcard Search

The single character wildcard search looks for terms that match that with the single character replaced. To perform a single character wildcard search, use the "?" symbol.

Example: To search for text or test, enter the query:
`te?t`

Multiple Character Wildcard Search

Multiple character wildcard searches look for zero or more characters. To perform a multiple character wildcard search, use the "*" symbol.

Example: To search for test, tests, or tester, enter the following:

`test*`

You can also use wildcard searches in the middle of a term.

Example:

`te*t`

Use Boolean Operators in a Global Search

Boolean operators allow you to perform global searches using multiple terms that are combined through logic operators. The following Boolean operators are supported: AND, +, OR, NOT, and -.

Enter Boolean operators in all caps.

OR

OR is the default conjunction operator, which means no Boolean operator exists between two terms, OR is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. This operation is equivalent to a union using sets. You can use the symbol || in place of the OR operator.

Example: To search for documents that contain "jakarta apache" or "jakarta", use the query:

`"jakarta apache" "jakarta"`

or,

`"jakarta apache" OR "jakarta"`

or,

`"jakarta apache" || "jakarta"`

AND

The AND operator matches documents in which both terms exist anywhere in the text of a single document. This operation is equivalent to an intersection using sets. You can use the special character && in place of the AND operator.

Example: To search for "jakarta apache" and "jakarta CA Clarity PPM", use the query:

`"jakarta apache" AND "jakarta CA Clarity PPM"`

or,

`"jakarta apache" && "jakarta CA Clarity PPM"`

+ (required)

The +, or required, operator requires that the term after the + operator to exist somewhere in a field of a single document or form.

Example: To search for documents containing "jakarta" with or without "CA Clarity PPM", use the query:

```
+"jakarta CA Clarity PPM"
```

NOT

The NOT operator excludes documents or forms that contain the term after the NOT operator. You can use the symbol ! in place of the NOT operator.

Example: To search for documents that contain "jakarta apache" but not "jakarta CA Clarity PPM", use the query:

```
"jakarta apache" NOT "jakarta CA Clarity PPM"
```

or,

```
"jakarta apache" ! "jakarta CA Clarity PPM"
```

The NOT operator cannot be used with a single term. This query returns no results:

```
NOT "jakarta apache"
```

- (prohibit)

The -, or prohibit, operator excludes documents that contain the term after the - operator.

Example: To search for documents and forms that contain "jakarta apache" but not "jakarta CA Clarity PPM", use the query:

```
"jakarta apache" - "jakarta CA Clarity PPM"
```

Form Subqueries in a Global Search

Subqueries allow you to control the Boolean logic during global searches by grouping clauses with parentheses. For example, to search for documents and forms that contain either "jakarta" or "apache" and "website", include the following sub query in the query:

("jakarta" OR "apache") AND "website"

The preceding query helps ensure that "website" exists and that either term, "jakarta" or "apache", possibly exist.

Escape Special Characters in Global Searches

Escape special characters in global searches properly. To escape these characters, use the "\" (backslash) character before the special character. For example, to escape the special characters in a global search for (1+1):2, use the following query:

```
\(1\+1\)\:2
```

The following table lists the special characters:

<table>
<tr><th>Special Character</th><th>Description</th><th>Rule</th></tr>
<tr><td>+</td><td>plus sign</td><td>\+</td></tr>
<tr><td>-</td><td>minus sign</td><td>\-</td></tr>
<tr><td>&&</td><td>double ampersand</td><td>\&&</td></tr>
<tr><td>||</td><td>double solid vertical bars</td><td>\||</td></tr>
<tr><td>!</td><td>exclamation point</td><td>\!</td></tr>
<tr><td>(</td><td>left parenthesis</td><td>\(</td></tr>
<tr><td>)</td><td>right parenthesis</td><td>\)</td></tr>
<tr><td>{</td><td>left curly brace</td><td>\{</td></tr>
<tr><td>}</td><td>right curly brace</td><td>\}</td></tr>
<tr><td>[</td><td>left square bracket</td><td>\[</td></tr>
<tr><td>]</td><td>right square bracket</td><td>\]</td></tr>
<tr><td>^</td><td>circumflex</td><td>\^</td></tr>
<tr><td>"</td><td>quotes</td><td>\"</td></tr>
<tr><td>~</td><td>tilde</td><td>\~</td></tr>
<tr><td>*</td><td>asterisk</td><td>*</td></tr>
<tr><td>?</td><td>question mark</td><td>\?</td></tr>
<tr><td>:</td><td>colon</td><td>\:</td></tr>
<tr><td>\</td><td>backslash</td><td>\\</td></tr>
</table>

Chapter 8: Timesheets

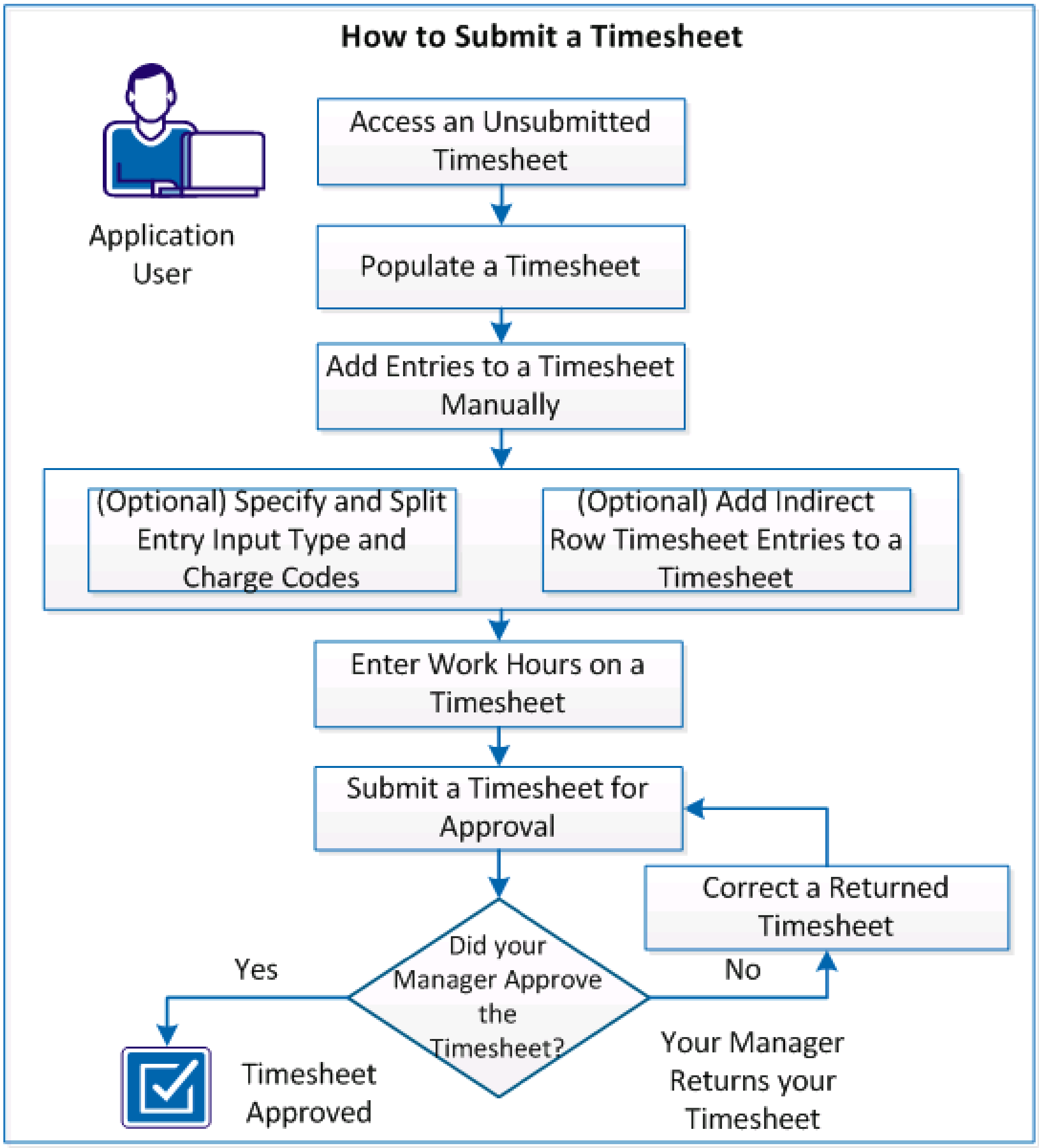
This section contains the following topics:

How to Submit a Timesheet

As an application user, you are responsible for tracking the number of hours that you work on specific tasks. Tracking work time using timesheets allows companies to plan budgets for complex projects, track the allocation of resources, implement charge codes, and so on. Therefore, your manager may ask you to track the hours you spend on specific tasks for specific projects. Depending on the policy of your company, your manager may also want you to track the hours you spend on tasks under various charge codes and input methods. As an application user, you track your working hours, using timesheets.

For more information about how projects are managed using CA Clarity PPM, see the *Project Management User Guide*.

The following diagram describes how an application user submits a timesheet.



To submit a timesheet, perform these steps:

1. Access an Unsubmitted Timesheet (see page 71)
2. Populate a Timesheet (see page 71)
3. Add Entries to a Timesheet Manually (see page 72)
4. (Optional) Specify and Split Entry Input Type and Charge Codes (see page 72)

5. (Optional) Add Indirect Row Timesheet Entries to a Timesheet (see page 73)
6. Enter Work Hours on a Timesheet (see page 73)
7. Submit a Timesheet for Approval (see page 73)
8. Correct a Returned Timesheet (see page 74)

Access an Unsubmitted Timesheet

After your manager registers you as a user, you can start to work with CA Clarity PPM. To start tracking time with timesheets, access your unsubmitted timesheets.

Follow these steps:

1. Open Home, and from Personal, click Timesheets.

   The timesheets list page appears with the unsubmitted timesheets up to the current reporting period.

2. Click the Timesheet icon next to the timesheet.

   The timesheet page appears.

Populate a Timesheet

When you first open a timesheet, the timesheet is blank, containing no tasks. To prepopulate your current timesheet with tasks, click the Populate button on the timesheet page.

Note: Depending on how your CA Clarity PPM administrator sets up your timesheet options, prepopulating a timesheet does one of the following tasks:

- Copies all of your assignments to the timesheet.
- Copies the timesheet entries and actuals from the most recently submitted timesheet to your current timesheet.

Add Entries to a Timesheet Manually

After you populate your timesheet with tasks, you can add additional tasks from your project. To manually add additional tasks to a timesheet, use the add task feature.

Follow these steps:

1. Click the Add Task button on the open timesheet.

   A page opens with a list of tasks available to the user.

2. Select the check box next to the tasks you want to add to the timesheet, and then click the Add button at the bottom of the page.

   Your timesheet opens with the manually added tasks.

Specify Entry Input Type and Charge Codes

Input type and charge codes are used for payroll purposes. If your company uses these codes, your project manager can make them available to you in your timesheets. Your manager may also want you to split entries in this process. Verify the policy of your company on input type and charge codes before submitting your timesheets.

For more information about this topic, see the *Project Management User Guide.*

Follow these steps:

1. Open the timesheet.
2. Select an input type code or charge code from the Input Type Code or Charge Code drop-down for the desired time entry row.
3. (Optional) Select the check box next to the timesheet entry you want to split it, and click Split.

   Note: This step is appropriate when your manager wants you to enter specific hours under two different charge codes. After you split the entry, you can select a type code or charge code from the Input Type Code or Charge Code field for the second entry.

4. Save the changes.

Add Indirect Row Timesheet Entries to a Timesheet

Your manager may want you to add indirect rows to a timesheet under an indirect category. To fulfill the specific requirements of your company, add an indirect row timesheet entry to a timesheet.

Follow these steps:

1. With your timesheet open, click New Indirect Row.

   A new entry is created.

2. If your company uses Charge Codes or Input Type Codes, select them.
3. Save the changes.

Enter Work Hours in a Timesheet

To record the time you worked each day on specific task assignments, use the timesheet page of your current work period.

Note: You can also distribute the number of hours for a single task evenly across all working days, by entering the total number of hours you worked in the Total column for the time entry row. If you enter values in both the Date and Total cells, the Date cell value overrides the Total cell value.

To track the time you spend on tasks each week, enter work hours on a timesheet.

Follow these steps:

1. Open the timesheet.

   The timesheet page appears.

2. Enter the number of hours you worked on each assignment each day in the Date cells of the timesheet.
3. Save the changes.

Submit a Timesheet for Approval

When you submit a timesheet, it goes to your manager for approval. The status of the timesheet is *Unapproved* until your manager approves it. To send a timesheet to your manager for approval, submit the timesheet.

Do one of the following:

- From the timesheets list page, select the timesheet, and click Submit for Approval.
- Open the timesheet, and click Submit for Approval.

Correct a Returned Timesheet

When your manager returns a timesheet, you receive a notification. The method of this notification depends on your account settings. If your manager returns a timesheet to you to correct, use the following process to correct the timesheet.

Follow these steps:

1. Access your timesheet.

   Note: The returned timesheet may have notes from your manager about what to correct. The Paper and Pencil icons on the timesheet indicate if there are new notes. For more information about timesheet notes, see the *Basics User Guide*.

2. Make the corrections to your timesheet as needed.

3. Submit your timesheet for approval.

   Your manager is notified that the corrected timesheet is ready for review and approval.

Chapter 9: Reports and Jobs

This section contains the following topics:

Reports Overview

Reports are documents that organize and display extracted CA Clarity PPM information. With reports, you can capture and analyze information related to your work. You can run and view out-of-the-box reports or reports designed for your specific needs.

About Report Security

Security for reports has three levels. The following levels describe what occurs at each level of access. The CA Clarity PPM administrator grants you access rights to specific features.

Report access

This access level lets you view reports. When you have access at this level, you can open the available reports page. The Reports - Access right includes this level of access.

You can be granted instance access rights to view and run a specific report. The Report - Run access right lets you run a report and view the output. This access right does not let you change the parameters that filter information for a report.

Report definition

This access level lets you edit a specific report definition. When you have this level of access, you can change the report parameters to filter information for a report. The Reports and Jobs - Edit Definition instance access right lets you edit a specific report definition.

Row-level security within a report

This access level helps ensure that information is provided to you if you have the right to view the information. The row content that appears in each report varies depending on the access rights you have to items contained in the report. For example, if you run a report that lists information for multiple projects, only those projects to which you have rights appear in the report.

Jobs Affecting Report Information

The Setup and Update Data Used by Reports and Time Slicing jobs generate report information. If these jobs fail, reports can be affected. If report information does not display, it implies that one of the jobs have failed to run.

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

Run or Schedule a Report To Run

You can run and view reports from the available reports page. You cannot delete or remove available reports.

If you have personalized the overview page to display the My Reports portlet, you can run reports from this portlet.

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

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Specify the filter criteria, or click Show All to view a list of all available reports.
3. Click the name of the report to execute.

   The properties page appears.

4. Define the run properties for the report, and save the changes.

Scheduled Report Runs

Scheduled report runs provide the ability to set up recurring schedules for your frequently viewed reports. By scheduling the reports to run in advance, the updated reports are available when you need them.

Define or Edit Scheduled Report Run Properties

You can edit the properties of scheduled report runs that have the "Cancelled" or "Completed" status using the report properties page. Otherwise, you can only view report run properties.

Report run properties include scheduling and notification information, and any parameters that you can customize.

Note: If a report is scheduled to run only once, you can only edit its properties before the scheduled run time.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. If you are editing the schedule of an existing report run, open the Reports menu, and click Scheduled Reports.

   The scheduled reports page appears.

3. Click the name of the report to define or edit the run properties.

   The properties page appears.

4. In the General section of the page, complete the following field:

   Report Name

   Defines the name of the report to run. For scheduled runs, a display-only report ID and its status are displayed.

5. In the Parameters section, complete the following fields:

   Parameters

   Specifies the parameters used to run the report. The parameters that appear vary based on the report displayed. If this section does not appear, then your administrator did not define parameters.

6. In the When section, choose when you want to run the report:

   When

   Defines the interval on which the report runs.

   Values:

   - Immediately. Select to run the report now.
   - Scheduled. Select to schedule the report to run later. Then complete the following fields:

Start Date

Defines the date of running the report.

Required: Yes

Start Time

Defines the start time in hours and minutes.

Recurrence

Defines the recurrent run time. You can set a recurrence, such as weekly or monthly, by clicking the Set Recurrence link. You can also set the recurrence of a scheduled report by using UNIX crontab format entry. To use crontab to set the recurrence, click Use UNIX Crontab Entry Format, and enter the schedule.

7. Click Set Recurrence to specify a repeating run time for the report, and complete the following fields:

   Run Once

   Indicates if this scheduled occurrence only occurs once.

   Weekly

   - On. Defines the day of the week (Sunday through Saturday) on which the report run starts.
   - Months. Defines the month (January through December) on which the report run starts.
   - Recur Until. Defines the date until which the report run is to recur.

   Monthly

   - Days of the Month (1-31). Defines the specific day (range 1-31) each month on which the report run is to start.
   - Months. Defines the month (January through December) on which the report run starts.
   - Recur Until. Defines the date until which the report run is to recur.

   Use UNIX crontab entry format

   Defines the schedule in UNIX Crontab entry format. Go to Oracle docs.sun.com for more information about the UNIX crontab syntax format and special character usage.

   Example: 0 0 1, 15 * * runs the report at midnight on the 1st and 15th of every month.

8. Complete the following fields in the Notify section:

   Resources to Notify on Failure

   Specifies the users who receive report status notifications when the report run fails.

   Resources to Notify on Completion

   Specifies the users who receive report status notifications when the report run successfully completes.

   Groups to Notify on Failure

   Specifies the groups who receive report status notifications when the report run fails.

   Groups to Notify on Completion

   Specifies the groups who receive report status notifications when the report run successfully completes.

   Note: If a report fails, check the status of scheduled runs for additional information or contact your administrator for assistance.

9. Save and submit the changes.

View the Status of a Scheduled Report Run

You can check report scheduled run times and check report run statuses using the scheduled reports page. All scheduled report runs (except the deleted reports) appear in the list regardless of their status.

Scheduled report runs can have the following statuses:

- Cancelled. The scheduled run is stopped and future recurring runs permanently cancelled.
- Completed. The single, nonrecurring scheduled run is complete and the generated report output is available.

  Recurring scheduled runs never show a "Completed" status.
- Paused. The scheduled run is stopped temporarily.
- Running. The scheduled run is in progress.
- Scheduled. The scheduled run starts generating the report on its prescribed date and time.
- Waiting. The scheduled run cannot start generating the report until an incompatible report or job run is completed.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Scheduled Reports.

   The scheduled reports page appears.

Delete a Scheduled Report Run

You can delete scheduled runs with a "Cancelled" or "Completed" status. Deleting a scheduled run does not delete the report type, or any completed generated reports listed in the Reports Library.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Scheduled Reports.

   The scheduled reports page appears.

3. Select the check box next to the run, and click Delete Job.

Add a Report to the My Reports Portlet

If you have personalized the Overview page to display My Reports portlet, you can add any available report and run reports from the page.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click the name of the report to add.

   The properties page appears.

3. Click Add to My Reports.

   The report is added to the My Reports portlet on the Overview page.

View a Generated Report

Use the report library page to review generated report output to which you have access or to view the run properties of generated reports. You must have Adobe Acrobat Reader installed to view reports. Requires the view permission for a report to view the report in the report library page.

If you ran the report immediately, the output appears in a separate window. Otherwise, if you scheduled the run, you can access the report output from the report library page.

Note: For reports that run immediately, you have the option to view the report immediately. You can also save the report and view it later from the report library page.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Report Library.

   The report library page appears.

3. Do one of the following:

   ■ Click the Open Report icon next to the report to review.

     The report output appears.

   ■ Click the Report link to view run properties.

Delete Generated Reports

You can delete generated reports as needed. Also, request the Remove Job Logs and Report Library entries job run to periodically remove outdated reports from the Reports Library.

For more information, see the *Administration Guide*.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Report Library.

   The scheduled reports page appears.

3. Select the check box next to the report, and click Delete.

Pause or Resume Scheduled Report Runs

Pausing scheduled report runs temporarily stops the report from running. When in this state, the report cannot run at its scheduled time until you resume the report run. When you resume the report runs, it runs at its next scheduled run time. You can pause reports that have a "Scheduled" status.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Scheduled Reports.

   The scheduled reports page appears.

3. Select the check box next to the scheduled report run, and do one of the following:

   - Click Pause.

     The status of the report run changes to "Paused".

   - Click Resume.

     The status of the report run changes to "Scheduled". The report runs at the next scheduled time.

Cancel Scheduled Report Runs

Canceling scheduled runs stops the run immediately and cancels any future runs. A cancelled run remains listed on the scheduled reports page with a status "Cancelled" status. Once you cancel a run, you cannot change its status or edit any of its properties.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Open the Reports menu, and click Scheduled Reports.

   The scheduled reports page appears.

3. Select the check box next to the scheduled run, and click Cancel Job.

   The status changes to "Cancelled".

Jobs Overview

Jobs are sets of actions used by CA Clarity PPM to perform automated administrative processes on a regular basis. For example, populating or refreshing database tables and running background processes. A job can be composed of queries, statements, or procedures.

For more information, see the *Administration Guide*.

Run or Schedule a Job to Run

You can view a list of all the jobs that you have access to. You can run a job immediately or schedule it to run later using the available jobs page.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The list page appears.

3. Click the name of the job.

   The properties page appears.

4. In the When section, complete the following field, and save:

   When

   Defines the interval on which the job runs.

   Values:

   - Immediately. Select to run the job now.
   - Scheduled. Select to schedule the job to run later, and complete the following fields:

   Start Date

   Defines the date for running the job.

   Required: Yes

   Start Time

   Defines the start time in hours and minutes.

Recurrence

Defines the recurrent run time. To set a recurrence, such as weekly or monthly, click the Set Recurrence link. To set the recurrence of a scheduled job, use UNIX Crontab Format Entry. To use Crontab to set the recurrence, select Use UNIX Crontab Entry Format and enter the schedule.

Example: 0 0 1, 15 * * means run the job at midnight on the 1st and 15th of every month.

Scheduled Job Runs

Use the scheduled job page to check the run times of a job and to check the run status. All scheduled runs (except deleted ones) are listed regardless of their status.

Use the scheduled jobs page to view the status of scheduled runs.

A scheduled run can have one of the following statuses:

- Cancelled. The scheduled run was stopped and future recurring runs permanently cancelled.
- Completed. The single, non-recurring scheduled run has completed. If the job definition is set to generate a log, you can view it in the Job Log.

  Note: Recurring scheduled runs never show a status of "Completed".
- Paused. The scheduled run is stopped temporarily.
- Running. The scheduled run is in progress.
- Scheduled. The scheduled run starts executing the job on its prescribed date and time.
- Waiting. The scheduled run has reached its scheduled run date and time, but cannot start executing the job until an incompatible report or job completes running.

Define or Edit Scheduled Job Run Properties

Using the job properties page, edit the properties of scheduled job runs that have a "Cancelled" or "Completed" status. Otherwise, you can only view job run properties.

Note: If you schedule a job to run only once, you can edit its properties before the scheduled run time.

Follow these steps:

1. Open the job.

   The properties page appears.

2. In the General section, complete the following fields:

   Job Name

   Defines the name of the job. For scheduled runs, you can change the name to distinguish each instance of a run.

   Example: Retailing Banking - Monthly Rate Extraction run

   Job ID

   Displays the unique identifier for a scheduled job.

   Job Status

   Displays the status for a scheduled job.

3. Complete the fields in the Parameters section.

   Note: The parameters that display vary based on the job. If this section does not display implies your CA Clarity PPM administrator defined no parameters. Save the parameters to reuse the defined set of parameters. Saved parameters appear in the list on the available jobs list page below the job type.

4. Complete the following fields, and save:

   When

   Defines the interval on which the job runs.

   Values:

   - Immediately. Select to run the job now.
   - Scheduled. Select to schedule the job to run later, and complete the following fields:

   Start Date

   Defines the date for running the job.

   Required: Yes

   Start Time

   Defines the start time in hours and minutes.

Recurrence

Defines the recurrent run time. To set a recurrence, such as weekly or monthly, click the Set Recurrence link. To set the recurrence of a scheduled job, use UNIX Crontab Format Entry. To use Crontab to set the recurrence, select Use UNIX Crontab Entry Format and enter the schedule.

Example: 0 0 1, 15 * * means run the job at midnight on the 1st and 15th of every month.

5. Complete the following fields in the Notify section:

   Resources to Notify on Failure

   Specifies the resources to notify on failure.

   Groups to Notify on Failure

   Specifies the groups to notify on failure.

   Resources to Notify on Completion

   Enter a resource name in the field or use the search tool to select the name from a resource list.

   Groups to Notify on Completion

   Enter the name of the group to notify in the field or use the search tool to select the group from a list.

6. Complete the following fields in the Sharing section:

   Resources

   Specifies the users who can view the generated report.

   Groups

   Specifies the groups who can view the generated report.

Pause or Resume a Scheduled Job Run

On the scheduled jobs page, you can pause any job with a "Scheduled" status, and resume any paused job. You can pause a run to stop temporarily a job from running. When in this state, the job cannot run at its scheduled time until you resume the job. When you resume a job, it runs at its next schedule run time.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The available jobs list appears.

3. Open the Jobs menu, and click Scheduled Jobs.

   The scheduled jobs list appears.

4. Select the check box next to the scheduled run, and do one of the following:

   a. Click Pause.

      The status for the job run changes to "Paused".

   b. Click Resume.

      The status for the job run changes to "Scheduled". The job runs at the next scheduled time.

View the Status of a Scheduled Job Run

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The available jobs list appears.

3. Open the Jobs menu, and click Scheduled Jobs.

4. Browse for or filter the scheduled runs.

   The jobs display in the list.

5. Check their status.

Cancel a Scheduled Job Run

You can cancel a schedule job run from the scheduled jobs list page. Canceling a scheduled job run stops the job immediately and cancels any future runs. A canceled run remains in the scheduled jobs list with a "Canceled" status. Once you cancel a job run, you cannot change its status, or edit any of its properties.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The list of available jobs appears.

3. Open the Jobs menu, and click Scheduled Jobs.

   The scheduled jobs page appears.

4. Browse for or filter the scheduled runs.

   The jobs display in the list.

5. Select the check box next to the scheduled run, and click Cancel Job.

   The status of the scheduled job changes to "Canceled."

View the Job Log

Use the jobs log page to view information about a job run, or delete outdated job logs.

A job log consists of a read-only version of its run properties and lists job entries, times, and any messages. If a job fails, the log indicates the nature of the error.

You can also schedule the Remove Job and Library job to remove job logs and report instances periodically from the Report Library or Job Log.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The available jobs list appears.

3. Open the Jobs menu, and click Log.

   A list of jobs with log entries appears.

4. Click the name of the job.

   The job log displays.

Delete a Scheduled Job Run

Using the scheduled jobs page, you can remove scheduled job runs with a "Cancelled" or "Completed" status. Removing scheduled runs does not delete the job type, or any of the job logs of the run.

Follow these steps:

1. Open Home, and from Personal, click Reports and Jobs.

   The list page appears.

2. Click Jobs.

   The available jobs list appears.

3. Open the Jobs menu, and click Scheduled Jobs.

   The scheduled jobs page appears.

4. Select the check box next to the scheduled run, and click Delete Job.

Chapter 10: Account Settings

This section contains the following topics:

How to Manage Your Account

Use the account settings pages to change elements of your resource profile, assign your action items to a different user, and to download software. Use the personal information page to manage your account settings.

You can do the following to manage your account settings:

- Manage your personal information (see page 91).
- Update your password (see page 93).
- View a list of proxies (see page 94).
- Update your proxy settings (see page 94).
- Change the method in which you receive notifications (see page 95).
- Download software (see page 98).

Manage Your Personal Information

Use the personal information page in account settings to do the following:

- Update your contact and password information
- Reset your home page
- Set the current timesheet as your home page

For more information about managing resources, see the *Resource Management User Guide*.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.

   The personal information page appears.

2. In the General Information section, complete the following fields, and save:

   User Name

   Defines the user name that the resource uses to log in to CA Clarity PPM. On the personal information page, displays the user name.

   Limits: 80 characters

   Last Name

   Defines the last name for the resource. On the personal information page, displays the last name.

   Required: Yes

   First Name

   Defines the first name for the resource.

   Required: Yes

   Email Address

   Defines the address the notifications and other CA Clarity PPM communications are sent to. On the personal information page, displays the email address.

   Required: Yes

   Note: Accurate and updated address is required.

   SMS Address

   Defines the SMS (Short Messaging Service) address to which notifications are sent. The SMS transmits short messages to mobile communications devices such as cellular telephones.

   Note: Contact your mobile service provider for details about using the SMS.

   Work Phone

   Defines your work telephone number.

   Home Phone

   Defines your home telephone number.

   Time Zone

   Defines the primary workplace time zone.

Locale

Defines your work locale. The locale drives the number and date language formatting in CA Clarity PPM.

Default: English (United States)

Language

Defines the language to use CA Clarity PPM. The language selected here also applies to the Business Objects reports for the resource.

Note: Change in the language takes 15 minutes to reflect. You can wait for 15 minutes, or log out and log back in to reflect the change.

Default: English

Home Page

Defines your home page.

Default: System Default or User Configured

Update Your Password

You can include an unlimited number of characters in your password.

Best Practice: Select a combination of letters and numbers in your password to help ensure that your information remains secure.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.

   The personal information page appears.

2. In the Change Passwords section, complete the following fields, and save:

   Old Password

   Defines the current password you use to log in to CA Clarity PPM.

   New Password

   Defines the new password you can use to log in to CA Clarity PPM.

   Confirm Password

   Defines the confirmation of the new password you can use to log in to CA Clarity PPM.

Designate Proxies

You can temporarily designate another resource as your action items proxy using the proxy page in account settings. As a proxy, the assigned resource receives action items (such as your regularly scheduled or urgent actions items) during the specified proxy period.

During the period that an action item is due, the designated proxy sees the action item in their Action Items portlet on their overview page.

Important! Verify that the resource designated as your action items proxy has the appropriate access rights for the actions they must process. For example, if you designate a proxy to receive action items to approve timesheets, the proxy requires the Timesheets - Approve All right.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.
2. Click Proxy.

   The proxy page appears.
3. In the Setup section, complete the following, and save:

   Proxy

      Specifies if you want to use a proxy.

   Resource

      Defines the resource being designated as your proxy.

   Start Date

      Defines the start date for the proxy period.

   End Date

      Defines the end date for the proxy period.

View Your List of Proxies

If other resources have designated you as their action items proxy, their names appear in the Resources field on the proxy page of account settings. Any action items that become due during the proxy period display in your Action Items portlet on the overview page. One or more resources can designate you as a proxy.

Notifications Setup

Notifications are automatically generated when certain actions are triggered. For example, you can select notification by email when someone responds to an action item.

You can view and manage the method in which you receive your notifications when their associated events are triggered. Select from the following types of notification methods:

- Alert. Sends alerts to the Notifications portlet on the overview page and to the notifications page of the organizer.
- Email. Sends emails to your email account.

  Specify your email address in your resource profile to use this notification method.
- SMS. Transmits short messages to mobile communications devices such as cellular telephones.

  Note: Specify your Short Message Service (SMS) address to use this notification method.

Notification Functional Areas

The following list describes examples of situations that trigger notifications for each functional area:

Action Items

A notification is sent out when a new action item is assigned to you and when one is due.

Change Request

A notification is sent when you are assigned to a change request.

Escalation

A notification is sent when a process fails or stalls and you are identified as the person to notify for escalations.

Issues

A notification is sent when you are assigned to an issue.

Processes

A notification is sent when a resource identifies you as the person to contact for a certain step in a process.

Projects

A notification is sent when a resource adds you to or removes you from a project.

Reports and Jobs

A notification is sent when a report or job you initiated, scheduled, or assigned to is completed or failed.

Risks

A notification is sent when you are assigned to a risk.

Timesheets

A notification is sent when you receive notification for a timesheet submitted. If you submitted a timesheet, you can receive notification that it is overdue or returned.

Manage Your Notification Settings

Use the notifications page in account settings to specify, or change the types of notifications you want to receive. You can also specify the method used to receive notifications.

All the method check boxes for each functional area are selected by default.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.

   The personal information page appears.

2. Click Notifications.

   The notifications page appears.

3. Select the check box next to each notification and method you want to receive, and save the changes.

Specify Notification Methods

You can view and manage the method in which you receive your notifications when their associated events are triggered. Select from the following types of notification methods:

- Alert. Sends alerts to the Notifications portlet on the overview page and to the notifications page of the Organizer.
- Email. Sends emails to your email account.

  Specify your email address in your resource profile to use this notification method.

  For more information about managing resources, see the *Resource Management User Guide*.

- SMS. Transmits short messages to mobile communications devices such as cellular telephones.

  Specify your Short Message Service (SMS) address to use this notification method.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.

   The personal information page appears.

2. Click Notifications.

   The notifications page appears.

3. Clear the check box next to each notification and method you do not want to receive, and save the changes.

Software Downloads

You can download the following software from CA Clarity PPM:

Open Workbench

This application is desktop project management software. You can use Open Workbench as a stand-alone software application or with CA Clarity PPM.

Microsoft Project Interface

Use CA Clarity PPM Microsoft Project Interface to connect Microsoft Project with CA Clarity PPM.

Java Runtime Environment

Use Java Runtime Environment to use XML Open Gateway (XOG) to pass data between CA Clarity PPM and other programs.

Adobe SVG Viewer

Allows you to view graphical portlets and processes.

SAP BusinessObjects Xcelsius 2008

Used to download and install the Xcelsius locally on your computer. Use Xcelsius to create visualizations and to set up the data connections.

Note: For this download link to display on the software downloads page, requires access rights to install Xcelsius. In addition, the CA Clarity PPM administrator requires copying the Xcelsius setup zip file to a CA Clarity PPM install folder.

Contact your CA Clarity PPM administrator if you are unable to download Xcelsius.

CA Clarity UI Themes as Xcelsius Color Schemes

Used to give your Xcelsius visualizations the same colors as your portlets and pages in CA Clarity PPM. The CA Clarity PPM UI themes are available to use in Xcelsius visualizations.

Follow the instructions on the software downloads page for information about making UI themes available as Xcelsius color schemes.

Design Files for Stock Xcelsius Visualizations

Used to help you get started with sample implementations. You can use the Xcelsius visualizations design files (.XLF) as is, or you can use them as a starting point to design your own Xcelsius visualizations.

See the *CA Clarity-Xcelsius Implementation Guide* for more information.

Download Software

Use the following procedure to download client software to your computer from CA Clarity PPM. To download software:

- The CA Clarity PPM administrator requires setting up the installation files on the CA Clarity PPM server.
- Requires the access rights to download the software.
- Requires administrator rights to install the software.

Note: Even if you have the appropriate access rights, the software may not be available. Make a note of the folder location to which you install the software.

See your CA Clarity PPM administrator for assistance if you are unable to download the required client software. In addition, contact your administrator if you have questions about the download process.

Follow these steps:

1. Open Home, and from Personal, click Account Settings.

   The personal information page appears.

2. Click Software Downloads.

   The software downloads page appears.

3. Click the Download link next to the name of the software.

   Depending on the software you select, a series of file download, "Save As", and install windows open.

4. Follow the download instructions.

Appendix A: Keyboard Shortcuts

This section contains the following topics:

Keyboard Shortcuts for Basic Features

The following table shows the keyboard shortcuts for basic features available on all CA Clarity PPM pages.

Feature	Key Combination
Home Menu	Ctrl+Alt+h
Administration Menu	Ctrl+Alt+a
Favorites Menu	Ctrl+Alt+f
Back	Ctrl+Alt+b or Alt+Left Arrow
Home Page	Ctrl+Alt+Home
Refresh	Ctrl+Alt+F5
Search	Ctrl+Alt+s
History	Ctrl+Alt+v
Help	F1

Keyboard Shortcuts for CA Clarity PPM Actions

The following table shows keyboard shortcuts for actions on CA Clarity PPM pages.

Action	Key Combination	Alternate Accessibility Key Combination
Activate a field editor (for example, a date picker)	Enter	Alt+Enter

Action	Key Combination	Alternate Accessibility Key Combination
Close a popup	Esc	Shift+Esc
Open a tab menu	Enter	Alt+Enter
Move left, right, up, or down in a menu	Left Arrow Right Arrow Up Arrow Down Arrow	Alt+Up Arrow Alt+Down Arrow Alt+Up Arrow Alt+Down Arrow
Select a highlighted menu item	Enter	Alt+Enter
Open a link in a list page	Ctrl+Enter	
Select or clear a check box **Note**: Focus must be on the checkbox.	Space Bar	
Expand a hierarchical list **Note**: Focus must be on the + in the hierarchical list.	Space Bar	

Keyboard Shortcuts for Lists

The following table shows the keyboard shortcuts for lists.

Action	Mode	Keyboard Combination
Switch between edit and display mode in a list	Display, Edit	Enter
Move from cell to cell through a list (grid)	Display	Left Arrow Right Arrow Up Arrow Down Arrow
Move to different areas within a list: portlet icons, column headers, body of list, buttons	Display	Tab (Forward) Shift+Tab (Back)
Switch to display mode	Edit	Esc or Enter
Move left or right within a cell	Edit	Left Arrow Right Arrow
Move from editable cell to editable cell	Edit	Tab (Forward) Shift+Tab (Back)

Action	Mode	Keyboard Combination
Move to the end of a row **Note**: If the action is on a TSV row, repeat the keyboard combination to leave the TSV section.	Edit	Ctrl+Right Arrow
Move to the beginning of a row	Edit	Ctrl+Left Arrow
Page up or down	Display, Edit	Ctrl+Alt+Up Arrow Ctrl+Alt+Down Arrow
Move to the top or bottom of a list **Note**: If the action is in a TSV cell, repeat the keyboard combination to leave the TSV section.	Display, Edit	Ctrl+Up Arrow Ctrl+Down Arrow
Open a drop-down list or a date selector	Edit	Enter
Move through selection items in a drop-down	Edit	Up Arrow Down Arrow
Select a highlighted value in a drop-down or a date selector	Edit	Enter
Highlight a date in a date selector	Edit	Down Arrow
Add a new line in a long text area	Edit	Ctrl+Enter

Keyboard Shortcuts for Time-Scaled Value Cells

The following table shows the keyboard shortcuts for time-scaled value cells in a list.

Action	Key Combination	Alternate Accessibility Key Combination
Select a TSV row	Shift+Ctrl+Right Arrow	
Select a TSV column	Shift+Ctrl+Down Arrow	
Select a single cell to the left or right of the current cell	Shift+Right Arrow Shift+Left Arrow	
Select a single row above or below the current cell	Shift+Up Arrow Shift+Down Arrow	
Copy a TSV cell	Ctrl+c	
Paste a TSV cell	Ctrl+v	
Cut a TSV cell	Ctrl+x	

Action	Key Combination	Alternate Accessibility Key Combination
Undo a cut, copy, or paste operation	Ctrl+z	

Appendix B: Access Rights

This section contains the following topics:

Audit Trail Access Rights

The following access rights are available for audit:

Audit Trail - Access

Allows users to access audit page.

Type: Global

Audit Trail - View - All

Allows users to view any audit page.

Type: Global

Basic User Group Access Rights

The following access rights are provided by the default user group, *Basic Group for User Access*:

Account Settings - Navigate

Lets the user navigate to the Account Settings page.

Type: Global

Organizer - Access

Lets the user access the Organizer page and the Actions, Events, and Notifications portlets available from the Organizer page.

Type: Global

Projects - Navigate

Lets the user navigate to the Projects list page and to the My Projects portlet.

Type: Global

Dashboard Access Rights

The following access rights are available for dashboards:

Dashboard - Create

Allows users to create new dashboards from CA Clarity PPM.

Type: Global

Dashboard - Navigate

Allows users to navigate to any dashboard page in CA Clarity PPM.

Type: Global

Reports Access Rights

The following access rights are available for users who run and review reports:

Reports - Access

Allows users to access reports pages and the My Reports portlet. This access right is dependent on one of the following access rights being granted to a user:

- The *Reports - Run - All* access right
- Instance level access rights such as *Report - Run*, *Report - View Output*, or *Report - Edit Properties*

Type: Global

Reports - Run - All

Allows you to run any report. This right also allows users to schedule, edit properties, and view the output of any report. The access is dependent on being granted Reports - Access right.

Type: Global

Report - Run

Allows users to run specific reports, edit properties and review output.

Requires: Reports - Access right

Type: Instance

Reports - View Output - All

Allows users to view the output of any report.

Requires: Reports - Access right

Type: Global

Software Download Access Rights

The following access rights are available for downloading software:

Software Download - Microsoft Project Interface

Allows users to download the CA Clarity PPM Microsoft Project Interface.

Type: Global

Software Download - Open Workbench

Required to download Open Workbench.

Type: Global

Software Download - Xcelsius

Required to download Xcelsius.

Type: Global

Software Download - SVG Viewer

Required to download the SVG viewer.

Type: Global

Timesheets Access Rights

The following access rights are available for timesheets:

Timesheets - Navigate

Allows you to navigate to timesheet pages.

Type: Global

Timesheets - Edit All

Allows users to edit all timesheets.

Type: Global

Timesheets - Approve All

Allows users to approve all submitted timesheets.

Type: Global

Resource - Enter Time

Allows users to complete and submit timesheets for a specific resource.

Type: Instance

Project - Edit Project Plan

Allows users to add unplanned tasks to a specific project when completing their timesheets when they are a team member on the project.

Type: Instance