CA Clarity™ PPM

Glossary
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access right

An *access right* determines the object instances that users can access and the actions they can take on them. Access rights can be granted to the following objects:

- An individual resource

- A group

- Members of an OBS unit for an object instance, all object instances in an OBS unit, or all object instances at the global level

action item

An *action item* is a non-project unit of work (personal action item). You can generate an action item from a project.

activity

An *activity* is the second level in the default Work Breakdown Structure (Project-Phase-Activity-Task).

actual

Actuals refer to the actual time spent, cost incurred, or revenue generated on an investment, as opposed to the planned or expected time, cost or revenue.

adjustment

An *adjustment* is made within financial management through the WIP adjustment process. Use adjustments to correct transactions that are inadvertently charged to the incorrect project, or when an incorrect cost code is selected for the transaction. This adjustment is made before the billing cycle procedures begin. An adjustment becomes available for billing only after it has been approved.

allocation

An *allocation* is the time period a resource is booked to a project.

as-of date

An *as-of date* is a reference date that separates actual data from future data and is the key date for Earned Value Analysis (EVA).

assignment

When a resource is assigned to a task, the task becomes an *assignment*. A task can contain multiple assignments.

attribute (field)

An *attribute* is information that is associated with an object. The information can display on an object's pages.

autoschedule

An *autoschedule* is an Open Workbench feature that allows you to schedule a project automatically, subject to dependency relationships, task priorities, and (optionally) resource availability constraints. Autoscheduling with resource constraints is similar to Resource Leveling in Microsoft Project.

availability

Availability is the total amount of time a resource is available for booking.

back loading pattern

Back loading pattern is an assignment loading pattern by which a resource is scheduled as late as possible in the process of completing a task.

base calendar

A *base calendar* is the calendar from which another calendar receives its default values.

baseline

A *baseline* is a snapshot of the total effort of a project and the total costs at the moment of capture.

booking

A *booking* occurs when a resource is assigned to a project for a specified duration. Booking status can be hard (committed) or soft (tentatively scheduled).

business day

A *business day* is also named a workday. The opposite of a business day is a holiday.

calendar

A *calendar* is a set of dates that are defined as working days or non-working days. CA Clarity™ PPM comes with default calendar values. You can create a repository calendar from a system base calendar and a resource calendar from a repository base calendar.

capacity

Capacity is the total number of resources that are available to accommodate the demand for resources in projects.

category (notes)

A *category* helps you organize a note. When writing a note, you can classify the note by a category.

charge code

A *charge code* is used to classify planned or actual costs. For example, charge code values are typically capital and expense, to indicate whether the costs are capitalized, or expensed as incurred.

contour loading pattern

A *contour loading pattern* is an assignment loading pattern by which a resource is used to complete a task at a rate that varies with resource availability. For example, a developer is available three hours on Monday and four hours on Tuesday. The developer is assigned to the task for three hours on Monday and four hours on Tuesday through the autoscheduling process of the project's scheduling tool.

cost code

A *cost code* represents the services that are provided, tasks, activities, or third-party costs or expenses that are incurred during a project.

critical path

A *critical* path is a set of tasks in the project. The delay or expansion of a critical path lengthens the project or causes the project deadlines to slip. The critical path determines the earliest finish date of the project and does not take resource constraints into account.

critical path method

Critical path method (CPM) is a method that the project scheduling tool uses to calculate the duration of the project. The critical path of a project is the longest path in terms of duration to complete a set of tasks. The project scheduling tool uses the critical path value to determine the tasks that drive the project deadlines and constraints.

data provider

A *data provider* is the source of data that is used by Studio portlets. Data providers can be objects, queries, or system types. If you chose to use queries to provide data, you must use NSQL to create the queries. The data model of CA Clarity PPM supports most of the business objects you need, but you can also create constructs to meet your unique business needs.

date range

A *date range* is a span of time between start and finish dates.

default

A *default* value is the value entered in a field by the system when you create a record. Typically, you can change this value. In some cases, you can reset the field to the default value.

deliverable

A *deliverable* is a measurable result of a product of a task, such as a report or a prototype.

demand

Demand is the need to fill the project tasks with resources.

dependency type

A *dependency type* is a type of constraint that is placed on the start or finish date of the detail task or milestone. The product supports the following dependency types:

- **+ Finish-Start**

  The successor task cannot finish until its predecessor has started.

- **+ Finish-Finish**

  The successor task cannot finish until its predecessor is finished.

- **+ Start-Start**

  The successor task cannot start until its predecessor has started.

- **+ Start-Finish**

  The successor task cannot start until its predecessor is finished.

dimension

A *dimension* is a related data element in a query. For example, project-related data such as project ID, name, start date, so on, is considered a single dimension. If a query contains project and resource data, it contains two dimensions.

duration

A *duration* is the length of time, in business days, that a task requires from conception to completion, including the start and finish dates.

edit mode

An *edit mode* is a state in which the keystrokes, such as entering or deleting text, affect the contents of cells. Edit mode is different from navigation mode.

entity

An *entity* refers to any company that has a set of books on its own general ledger or has one of many books in a general ledger.

estimate at completion (EAC)

Estimate at completion (EAC) is the expected total cost of a task based on the performance. EAC is calculated as Actual + Estimate to Complete (ETC) x Billing Rate.

estimate to complete (ETC)

Estimate to complete (ETC) is the estimated time that is required for a resource to complete a task assignment. ETC is used for project planning and revenue recognition.

financial attribute

A *financial attribute* can be used for grouping cost plan data, or to drive costs and revenues using the Rate Matrix. Examples of financial attributes are department, location, charge code, WIP class, resource, role, input type code, and transaction class.

financial organization structure (FOS)

The *financial organization structure (FOS)* is the segment of the OBS that relates to project accounting. FOS creates the relationship between entities, locations, and departments.

financially-enabled

Financially-enabled indicates that a resource or role has financial properties, and so can be used for financial activities such as cost plans, transactions, and determining costs and rates in the rate matrix.

finish date

A *finish date* is the current planned date on which a task or project will be completed.

fixed duration

A *fixed duration* is a task for which the duration is constant and is not driven by resource assignments. A fixed duration task is also called a time-constrained task.

float

A *float* represents the number of days by which the initiation or completion of a task can be delayed without adversely affecting the Project Finish Date. Float is calculated as Late Start - Early Start.

front loading pattern

A *front loading pattern* is the rate at which a resource is used to complete a task. In this case, the resource is scheduled to work on the task as soon as possible.

full-time equivalent (FTE)

Full-time equivalent (FTE) is a method for normalizing data for full and part-time resources and is calculated based on the standard calendar. For example, the capacity of a part-time resource is counted as 0.5 FTE.

gantt chart

A *gantt chart* is a chart with time along the horizontal axis. This chart displays the status of multiple tasks. The duration of each task is displayed as a horizontal bar in the gantt chart of the scheduling tool. The ends of the bar correspond to the start and finish dates of the tasks.

group

A *group* is a collection of resources that require the same set of access rights. It can also be a logical grouping of steps within a process.

grouping attribute

A *grouping attribute* is any one of several financial attributes that can be used to organize cost plan detail records.

guideline

A *guideline* is an instruction on how to perform a task, general statements of a policy, or any information that can help a resource to complete the tasks in a project.

holiday

A *holiday* is a non-business day when a resource is unavailable. You set days as business days or holidays in the calendar.

idea

An *idea* is the initial stage for creating new opportunities for investment.

incident

An *incident* is an unscheduled event that is not part of the standard operation of a service. An incident can interrupt or reduce the quality of service.

indirect entry

An *indirect entry* is a time entry on the timesheet that is not directly related to a project, such as taking vacation or a training class.

investment

An *investment* is a project, program, asset, or product that corporations fund to help achieve their business goals. A portfolio inventory is made up of investments.

key task

A *key task* indicates the important tasks in the work breakdown structure (WBS).

lag

A *lag* is the amount of time between two dependent tasks. For example, if you want Task B to start three days after Task A is finished, make the relationship Finish-Start and enter 3 as the lag. Alternatively, you can enter a negative number to indicate a negative lag. If you want Task B to start two days before Task A ends, enter -2 as the lag. You can also specify a lag or a negative lag as a percentage of the task duration.

late finish date

The *last finish date* is the latest date on which a task can be completed without adversely affecting the critical path of a project.

level of analysis

A *level of analysis* controls the level of consolidation of project data displayed in a view before filtering and sorting criteria are applied.

loading pattern

A *loading pattern* is the pattern in which resources are used to complete a task. The product supports the following loading patterns:

- Back Loading Pattern
- Contour Loading Pattern
- Fixed Loading Pattern
- Front Loading Pattern
- Uniform Loading Pattern

lookup

A *lookup* is a drop-down list or a browse list that filters portlet data.

master project

A *master project* is the top-level or parent project of child projects (or subprojects) that are related.

menu

A *menu* is a navigational element of the user interface that provides links to other product pages.

message area

A *message area* is a bar at the bottom of the user interface that shows messages describing selected objects or commands and available keys.

metric

A *metric* is a value in a data set, such as booked hours, capacity, or number of tasks that can be measured.

milestone

A *milestone* is a reference point for measuring the progress of a project. A milestone is a task that has no duration; its start date and finish date are the same.

module

A *module* is any component in the product that can be accessed using the main menu.

navigation mode

A *navigation mode* is a state in which keystrokes affect table cells, columns, and rows rather than their contents, such as moving the cursor from one cell to another. This mode is different from the edit mode.

net present value (NPV)

Net present value (NPV) is calculated as Benefit - Cost.

NSQL

NSQL is an extension of the SQL language that is used to query data in the CA Clarity PPM database.

object

An *object* defines the fields (attributes), links, and page layout that make up the product pages. For example, an object can be a resource, project, document, company, and so on.

object action

An *object action* is an action for an object that you can perform by clicking a link in a menu. System object actions are provided with CA Clarity PPM. You can create custom object actions and place them on a menu where they are needed. Examples of system object actions include New Project, Create Baseline, and Add Subproject.

object instance

An o*bject instance* is a unique item of an object. For example, the Wireless Network project is an instance of the Project object, and Inga Swenson is an instance of the Resource object.

OBS (organizational breakdown structure)

An *OBS (organizational breakdown structure)* is a hierarchical structure that controls security, drives reporting, and organizes resources and other objects. OBS often models the organization structure of an enterprise.

OBS level

An *OBS level* is the basic building block of an OBS. This level represents the depth of the OBS hierarchy.

OBS unit

An *OBS unit* is the basic building block of an OBS. This unit represents a unit in the OBS hierarchy.

overallocation

Overallocation occurs when a resource is assigned more project hours than the hours the resource is available to work.

participant

A *participant* is a member of the project team who can access the calendar, documents, processes, action items, and the discussions of the project. This participant may not necessarily be assigned any project tasks.

partition model

A *partition model* is a hierarchical structure that controls how objects are managed and appear in the product. Using partitions within the partition model, an enterprise can deploy corporate wide standards, processes, and policies, and can enable local divisions to deploy industry or business-specific standards and processes.

percent of completion

Percent of completion is a method of revenue recognition. Revenue on certain types of projects, primarily long-term and retainer contracts is calculated on a percent of completion basis.

personal calendar

A *personal calendar* is a calendar for specific a user. The calendar is a consolidation of the project events of all the users and any additional personal events.

phase

A *phase* is the top-level default value for Project-Phase-Activity-Task. Levels can be changed and added as required to match WBS conventions.

portfolio

A *portfolio* is an inventory of investments that determines where to invest funds or when to delay or cancel investments. Scorecards and scenarios are used to evaluate the financial health of investments in portfolios and their alignment to corporate goals.

portlet

A *portlet* is a snapshot into the product data and is a window pane of information. A portlet can be a graph, table, or a web page snippet.

portlet page

A *portlet page* is a CA Clarity PPM web page with content comprised of portlets or views. A portlet page can be configured to have a single or multiple tabs.

posting

Posting is the process of committing actual time data (actuals) on approved timesheets from a specified time period.

power filter

A *power filter* is advanced filtering based on the user-define criteria.

predecessor

A *predecessor* is a task that precedes another (successor) task. A predecessor is related to a successor by a dependency type link.

primary role

A *primary role* is the role that a resource performs most often. Primary roles are used in project planning.

process

A *process* is a series of steps that are used to automate a workflow. Each step in a process performs a single action that is intended to move the process towards its completion. Processes can route actions items and notifications to users when it is their turn to complete a request.

program

A *program* (initiative) is a top-level project that is the parent project to child projects. Unlike a master project, a program shows actuals and effort for all of the projects it contains.

project

A *project* is a set of related tasks that is designed to achieve a specific objective. A project is composed of tasks, staff who complete the tasks, financials, collaboration, document sharing, and so forth.

project calendar

A *project calendar* is a calendar for members of a project group. A project calendar is accessible to all project members to create and collaborate on events.

project management

Project management is a body of knowledge dealing with the planning and the control of projects. A set of principles, techniques, and tools are used to manage projects.

project plan

A *project plan* contains basic information about projects, such as start and finish dates. Third-party scheduler products (for example, Microsoft Project and Open Workbench) can be used to create tasks and assignments in a project plan.

query

A *query* is a set of conditions to retrieve specific information from a database.

rate matrix

A *rate matrix* is a user-configurable engine that uses financial attributes to return the planned and actual costs and rates for a given period.

requisition

A *requisition* is a formal request for one or more resources.

resource

A *resource* is a user who can be assigned to perform work on a project is a resource. You can associate resources with skills, primary role, resource pools and OBS. Resource profiles have properties such as resource name, email address, employment type, manager, available hours per day, target billable rate, and standard cost.

resource calendar

A *resource calendar* is a calendar that defines the availability of a resource, including non-working days such as weekends and resource shifts. A resource calendar drives resource allocation and availability for resource staffing.

resource usage

Resource usage is the amount of resource used. For example, hours an employee worked, number of employees that worked, fleet of cars that are driven, or how much funding from a pool has been used. People are always resources, but resources are not always people.

return on investment (ROI)

Return on investment (ROI) is the profit or loss that results from an investment transaction. ROI is calculated as Net Present Value (NPV) / Cost.

risk

A *risk* is a measurement of an investment's likelihood of meeting expectations. For example, finishing on time, within the budget, and with the expected quality level.

role

A *role* describes the work function or job responsibilities of a resource.

schedule

A *schedule* is a timetable for performing tasks, utilizing resources, or allocating facilities.

schedule variance (SV)

A *schedule variance (SV)* is the value of what you have accomplished to date versus what you planned to have accomplished on that date.
Schedule variance is calculated as BCWP - BCWS.

scheduler tool

A *scheduler tool* is a third-party product, such as Open Workbench and Microsoft Project, that can be used with the product for project scheduling and planning.

shortlist

A *shortlist* is a list of resources that resulted from searching for resources to book to projects or to attach to requisitions.

staff

Staff is a group of members of the project team who are assigned to the project tasks.

status

A *status* is the project results compared to the project plan. Status is determined in terms of costs, resources, deliverables, and whether the project is started, not started, or complete. In Open Workbench, a status indicator reflects the status of a project, or for a program, the status of its component projects.

subnet

A *subnet* is a group of tasks in a project that have dependencies among themselves. During autoschedule, a separate critical path can be calculated for each subnet.

subproject

A *subproject* is a child project contained in a master project or a program.

successor

A *successor* is a task that follows another task (predecessor) and is related to it by a dependency type link.

system partition

A *system partition* is the default partition that exists in each CA Clarity PPM enterprise installation. Any partitions that you create become children to this partition.

task

A *task* is a unit of work in a project plan that is assigned to one or more resources for a specified period. A task can have milestones to measure progress.

timesheet

A *timesheet* enables resources to record and submit the time spent (actuals) on the tasks that are assigned to them.

total effort

Total effort calculates the amount of effort that is required to complete a project or a task. Total effort is calculated as Actuals + Remaining ETC.

tracking

Tracking is the process of measuring the status of a project and comparing the status with the plan. Tracking is used to identify variances and to take corrective action.

transaction

A *transaction* is where all financial transactions for time, expense, and partial billings for projects are maintained. Only chargeable items that are in WIP can be billed. Items are removed from WIP and moved to history when the job is billed. Changes to the transactions in WIP can only occur by creating a WIP Adjustment or WIP Reversal entry.

transaction class

A *transaction class* defines the type of financial transaction. For example, billable or non-billable.

type code

A *type code* is an abbreviation, acronym, short phrase, or a number that refers to certain description of payroll time. For example, standard time, overtime, holiday pay, travel pay, straight commission, and consultant fees.

uniform loading pattern

A *uniform loading pattern* is an assignment loading pattern by which the time of a resource is scheduled evenly across a task. The time is scheduled only on those days when the resource is available to meet the task requirements.

unstructured project

An *unstructured project* (collaboration project) is a project that does not include any tasks. This project can include calendar, documents (including processes), discussions, and project roster features. No transaction processing occurs in an unstructured project.

usage

Usage is the total effort (actuals plus remaining ETC) to date for a resource.

user

A *user* is the labor resource who has access rights to use the product. A user can participate on a collaboration project and can also be a resource.

utilization

Utilization is the total usage per time period for a resource resulting from the summation of all tasks in the project.

versioning

Versioning refers to retaining and accessing prior iterations of a document.

view

A *view* determines how information is displayed on a page, such as in properties, list columns, or list filters.

virtual attribute

A *virtual attribute* is an attribute to which CA Clarity PPM can make calls but that does not physically exist in CA Clarity PPM. A virtual attribute can be a calculated attribute or an attribute with temporary values generated by CA Clarity PPM as needed. You cannot access a virtual attribute because it does not physically exist. Virtual columns are not stored in database tables.

virtual column

In a *virtual column,* the data is not computed when the query is created; the data is created in real time.

WBS activity

WBS activity is the grouping of tasks in a project plan.

WBS object

A *WBS object* is a step in the Work Breakdown Structure (WBS) used as a building block in Open Workbench and Microsoft Project. Organizations use different terms to refer to WBS objects. For example, Summary tasks or Parent tasks, Child tasks or Detail tasks. Each WBS object contains information on its dependencies, role assignments, initial estimates, and deliverables.

WIP adjustment transaction

A *WIP adjustment transaction* is created through the WIP Adjustment process to correct an error in a transaction that has been posted to WIP but not billed or invoiced.

WIP adjustment type

The product supports the following types of *WIP adjustments*:

■ **Modify**

Changes the data within a transaction, such as the number of hours worked in a labor transaction. Modify does not involve a transfer of data between different groups that define the transaction.

■ **Reverse**

Enters a counter-balancing transaction to cancel the original transaction.

■ **Transfer**

Occurs when a transaction is moved from one client, project, cost code, or employee to another.

WIP class

A *WIP class* is primarily used for the financial reporting of projects, but can also be used to drive planned and actual costs and revenues. WIP class is used for grouping WIP transactions for the general ledger.

WIP history

The transactions of the project can be moved from WIP to *WIP history* after the project has been closed.

WIP reversal transaction

A *WIP reversal transaction* reverses a financial transaction that has been posted to WIP, but has not been billed to a client. A WIP reversal completely removes a financial transaction from the project. If the financial transaction comes from a timesheet, the WIP reversal does not remove the transaction from the timesheet.

work breakdown structure (WBS)

A *work breakdown structure (WBS)* refers to the organization of tasks into a hierarchy that typically includes phases, key tasks, milestones, and subsequent tasks (child tasks that fall under a parent task).