

# CA Clarity™ PPM

## Access Rights Reference Guide

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# Chapter 1: Introduction to Access Rights

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Access rights provide users read or write privileges for features and functions. For example, assign portfolio managers *Portlet - View* instance rights so they can access the portfolio pages. Assign *Portfolio - Edit - All* global rights so they can edit all portfolios.

This guide is a reference of the following access rights available in CA Clarity PPM:

- [Auto-Access Rights](#) (see page 11)
- [Basic Group for User Access](#) (see page 13)
- [CA Clarity PPM Access Rights](#) (see page 19)
- [Add-ins Access Rights](#) (see page 105)

You can assign the CA Clarity PPM and Add-ins access rights at the following levels:

## **Instance**

Provides access to object instances (for example, a specific portfolio, rather than all portfolios).

## **Organization Breakdown Structure (OBS) Unit**

(Not typical for user groups.) Provides access rights to all instances having the selected OBS unit.

## **Global**

Provides unlimited access to an object (for example, all portfolios rather than a specific portfolio).



## Chapter 2: Auto-Access Rights

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Auto-access rights are granted automatically when you are assigned a role or when you perform a certain action. For example, if you are assigned as a project manager, you are automatically given the *Project – Manager (Auto)* access right. This right allows you to view and edit the general and management properties of the project.

To view these rights, open Administration, and from Organization and Access, click Resources. You can see these rights in the resource's list of access rights. These rights become visible in a resource's list of assigned access rights only after the condition is met.

If you are removed as the project manager, then this auto-access right is taken away.

The following table lists all the auto-access rights available in the product:

| Auto Access Right                | Object Type | Description                                                                                                                                                |
|----------------------------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application - Manager (Auto)     | Application | This right is equivalent to Application - Edit, and is automatically granted to the Application Manager.                                                   |
| Asset - Manager (Auto)           | Asset       | This right is equivalent to Asset - Edit, and is automatically granted to the Asset Manager.                                                               |
| Idea - Initiator (Auto)          | Idea        | Automatic right granted to the initiator of an Idea.                                                                                                       |
| Idea - Manager (Auto)            | Idea        | Automatic right granted to the manager of an Idea.                                                                                                         |
| Job Type Creator (Auto)          | Job/Report  | This right is automatically granted to the creator of a Job Type when it is created..                                                                      |
| Other Work - Manager - Automatic | Other Work  | Automatic right <i>granted to the</i> manager of Other Work; equivalent to Other Work - Edit.                                                              |
| Page Creator (Auto)              | Page        | Allows user to edit page.                                                                                                                                  |
| Portfolio - Owner (Auto)         | Portfolio   | Automatic right granted to an owner of a Portfolio.                                                                                                        |
| Portfolio - Stakeholder (Auto)   | Portfolio   | Automatic right granted to a stakeholder of a Portfolio.                                                                                                   |
| Portlet Creator (Auto)           | Portlet     | Allows user to edit portlet.                                                                                                                               |
| Product - Manager (Auto)         | Product     | Allows user to baseline all Products. Does not include the <i>Product - Navigate</i> right, and requires the user to have <i>the Product - Edit</i> right. |

|                                     |                      |                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project - Discussion Manager (Auto) | Project              | This right is automatically created for the user who creates a project. It makes the creator of the project the collaboration manager. The user can subsequently grant Collaboration Manager rights to additional resources or revoke this right by changing it to participant.                                                     |
| Project - Manager (Auto)            | Project              | The user who enables a project for management is automatically granted this right. In other words, the user becomes the Project Manager for the project. It allows user to view and edit the general and management properties of the project.                                                                                      |
| Project - Participant (Auto)        | Project              | A user assigned to a project as a project participant will automatically be assigned this right. The right allows the user access to Action Items, Project Calendar, Document Manager and Discussions.                                                                                                                              |
| Project - Participant Groups (Auto) | Project              | A user assigned to a project through a project group will automatically be assigned this right. The right allows the user access to Action Items, Project Calendar, Document Manager and Discussions.                                                                                                                               |
| Release - Manager (Auto)            | Release              | Automatic right granted to the manager of a Release.                                                                                                                                                                                                                                                                                |
| Release Plan - Manager (Auto)       | Release Plan         | Automatic right granted to the manager of a Release Plan.                                                                                                                                                                                                                                                                           |
| Report Type Creator (Auto)          | Job/Report           | This right is automatically granted to the creator of a Report Type when it is created.                                                                                                                                                                                                                                             |
| Requirement - Manager (Auto)        | Requirement          | Automatic right granted to the manager of a Requirement.                                                                                                                                                                                                                                                                            |
| Resource - Manager (Auto)           | Resource             | The user creating a new resource is automatically granted this right. In other words, the user becomes the resource manager for the resource. It allows the user to view and edit general resource properties. If the resource is assigned another resource manager, the present resource manager will lose rights to the resource. |
| Resource - Self (Auto)              | Resource             | Rights automatically granted to a resource when created. Includes Resource - Edit Ideas.                                                                                                                                                                                                                                            |
| Run Report (Auto)                   | Scheduled Job/Report | This right is automatically granted to the user who runs a report.                                                                                                                                                                                                                                                                  |
| Scenario - Creator (Auto)           | Scenario             | This right includes Scenario - Edit and Scenario - Edit Access Rights, and is automatically granted to the Scenario creator.                                                                                                                                                                                                        |
| Service - Manager Auto              | Service              | Automatic right granted to the manager of a service                                                                                                                                                                                                                                                                                 |

# Chapter 3: Basic User Group Access Rights

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The *Basic group for user access* is a group that every user is assigned to automatically when they are added to CA Clarity PPM. The members of this group automatically inherit the access rights of the group.

By default, all users are members of the group *Basic group for user access*, which provides the following access rights:

## **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 users navigate to the Projects list page and to the My Projects portlet.

**Type:** Global



# Chapter 4: How to Assign CA Clarity PPM and Add-ins Access Rights

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This section contains the following topics:

[How to Add Instance-Level Access Rights to a Resource](#) (see page 15)

[How to Assign Instance-Level Access Rights to a User Group](#) (see page 15)

[How to Assign Global-Level Access Rights to a User Group](#) (see page 16)

[How to Assign XOG Access Rights to a Resource](#) (see page 17)

## How to Add Instance-Level Access Rights to a Resource

You can give a resource instance-level access rights to a specific object, such as to a page or project.

**Follow these steps:**

1. Open Administration, and from Organization and Access, click Resources.
2. Click the resource name.
3. Open the Resource's Access Rights menu and click Instance.
4. Click Add.
5. Select the object from the drop-down list and click Next.
6. Select the access rights you want to assign to the user, and click Add and Continue.
7. Select the specific instances you want to give the user access to, and click Add.

## How to Assign Instance-Level Access Rights to a User Group

Assign instance-level access rights to provide access to specific object instances. For example, assign portfolio managers instance-level access to the Portfolio portlet pages so they can work with portfolios.

**Follow these steps:**

1. Open Administration, and from Organization and Access, click Groups.
2. Open a group and click Group's Access Rights.
3. Click Instance.

If the user group is new, no access rights appear.

4. Click Add.
5. Select an object from the drop-down list and click Next.
6. Select the access rights to add to the user group and click Add and Continue.  
**Note:** If more access rights are available on additional pages, select the access rights and click Add and Select More. Continue assigning access rights until all appropriate access rights have been assigned.
7. Select the instances that you want by clicking the corresponding check boxes and click Add.  
**Note:** If more instances are available on additional pages, select the instances and click Add and Select More. Continue assigning instances until all appropriate instances have been added.
8. Complete one of the following steps after you have finished assigning instance level access rights to the user group:
  - Click Continue to add global access rights, if the user group needs access rights for all instances of an object.
  - Click Return to go back to the Groups page.

After you assign instance-level access rights to a user group, you have successfully created a user group with access rights. The users in the user group can now perform their assigned tasks.

## How to Assign Global-Level Access Rights to a User Group

Assign global access rights for all instances of an object to system administrators or super users so they can perform both end-user and administrative functions.

For example, assign a user group, called Portfolio - Managers, global access rights to the Portfolios object. With this access, group members can create, edit, or remove portfolios.

### Follow these steps:

1. Open Administration, and from Organization and Access, click Groups.
2. Open a group and click Group's Access Rights.
3. Click Global.  
If the user group is new, no access rights appear.
4. Click Add.
5. Select the appropriate global rights for the user group and click Add.

**Note:** If more access rights are available on additional pages, click Add and Select More. Continue assigning access rights until all appropriate access rights have been assigned.

6. When you have finished assigning global rights to the user group, click Return.

After you assign global access rights to a user group, the users in the group can now perform their assigned tasks.

## How to Assign XOG Access Rights to a Resource

The following procedure explains how to assign XOG access rights to a resource.

**Follow these steps:**

1. Open Administration, and from Organization and Access, click Resources.
2. Click the resource name.
3. Open the Resource's Access Rights menu and click Global.
4. Click Add.
5. Enter \*XOG Access in the Access Right field and click Filter.
6. Select the appropriate XOG access rights and click Add.



# Chapter 5: CA Clarity PPM Access Rights

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The CA Clarity PPM access rights are grouped into the following categories:

- [Administration Access Rights](#) (see page 20)
- [Basics User Access Rights](#) (see page 48)
- [Demand Management Access Rights](#) (see page 52)
- [Financial Management Access Rights](#) (see page 61)
- [IT Service Management Access Rights](#) (see page 65)
- [Project Management Access Rights](#) (see page 75)
- [Resource Management Access Rights](#) (see page 86)
- [Studio Access Rights](#) (see page 92)
- [XOG Access Rights](#) (see page 97)

## Administration Access Rights

You require the following access rights to work with this category:

- [Administration Access Rights](#) (see page 20)
- [Audit Trail Access Rights](#) (see page 21)
- [Department Access Rights](#) (see page 22)
- [Earned Value Definition Access Rights](#) (see page 23)
- [Financial Administration Access Rights](#) (see page 24)
- [Financial Management Access Rights](#) (see page 24)
- [Financial Planning Access Rights](#) (see page 24)
- [Jobs Access Rights](#) (see page 26)
- [License Information Access Rights](#) (see page 28)
- [Location Access Rights](#) (see page 28)
- [Page Access Rights](#) (see page 29)
- [Portfolio Access Rights](#) (see page 30)
- [Portlet Access Rights](#) (see page 30)
- [Process Access Rights](#) (see page 32)
- [Project Access Rights](#) (see page 34)
- [Reports Access Rights](#) (see page 41)
- [Resource Access Rights](#) (see page 42)
- [Scenario Access Rights \(Capacity Planning\)](#) (see page 46)
- [Software Download Access Rights](#) (see page 47)
- [Timesheets Access Rights](#) (see page 47)

## Administration Access Rights

The following access rights are available to manage administrative tasks:

### **Administration - Access**

Allows the user to access the Administration menu.

**Type:** Global

**Administration - Application Setup**

Allows users to edit CA Clarity PPM system options and settings, including Organization and Access menu, Timesheet Options, Data Administration menu, and General Settings menu.

**Includes:** Administration - Access to access the Administration menu.

**Type:** Global

**Administration - Authorization**

Allows users to manage resources and groups.

**Includes:** *Administration - Access*

**Type:** Global

**Administration - Partition Models**

Allows users to manage partition models.

**Requires:** *Administration - Access*

**Type:** Global

**Administration - Resources**

Allows users to navigate to the administration pages for viewing and editing resources.

**Requires:** *Resource - Edit Administration* right to view individual resources.

**Type:** Global

**Administration - Studio**

Allows a user to navigate to Studio menus. Without this right, a user does not see the CA Clarity Studio menu in the Administration menu. This right is dependent on having a license to Studio.

**Type:** Global

**Administration - XOG**

Allows users to import and export information through the XML Open Gateway interface.

**Type:** Global

## 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

## Department Access Rights

You need the following access rights to work with departments.

**Department - Create**

Allows users to create departments.

**Includes:** *Department - Navigate* right

**Type:** Global

**Department - Edit**

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

**Department - Edit - All**

Allows users to edit and delete all departments.

**Includes:** *Department - View - All* right

**Type:** Global

**Department - Edit Access Rights**

Allows users to edit the access rights for a specific department.

**Requires:** *Department - Navigate* right and *Department - View* right

**Type:** Instance

**Department - Edit Access Rights - All**

Allows users to edit access rights for all departments.

**Requires:** *Department - Navigate* right and *Department - View* right

**Type:** Global

**Department - Navigate**

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

**Department - View**

Allows users to view specific departments.

**Requires:** *Department - Navigate* right

**Type:** Instance

**Department - View - All**

Allows users to view all departments.

**Includes:** *Department - Navigate* right

**Type:** Global

## Earned Value Definition Access Rights

The following access rights are required to work with earned value definitions:

**Earned Value Definition - Create**

Allows users to create a new earned value definition.

**Type:** Global

**Earned Value Definition - Edit Access Rights - All**

Allows users to edit the access rights for all earned value definitions.

**Requires:** *Earned Value Definition - Navigate* right or *Earned Value Definition - View* right

**Type:** Global

**Earned Value Definition - Edit All**

Allows users to edit any earned value definition.

**Type:** Global

**Earned Value Definition - Navigate**

Allows users to access any earned value definition pages.

**Type:** Global

**Earned Value Definition - View All**

Allows users to view any earned value definition.

**Type:** Global

## Financial Administration Access Rights

Users must be granted the following access rights if they are responsible for setting up structures:

### **Administration - Access**

Allows the user to access the Administration menu.

**Type:** Global

### **Financial Maintenance - Financial Organizational Structure**

Allows users to define the financial organizational structure and fiscal time periods. You can create, edit, and view entities, locations, departments, resource classes, transaction classes, and investment classes. Users can also assign departments to locations.

**Required:** Administration - Navigate

**Type:** Global

## Financial Management Access Rights

This section lists the access rights required for doing the following tasks:

- Setting up financial data
- Processing and monitoring transactions
- Processing and monitoring the financial cost/rate matrix

### **Financial Maintenance - Financial Management**

Allows users to access financial management setup features in the Administration menu.

**Type:** Global

## Financial Planning Access Rights

Users must have the following access rights for managing cost, benefit, and budget financial plans for any investment type.

### **<Investment> - Benefit Plan - Edit**

Allows the user to edit the benefit plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Benefit Plan - Edit All**

Allows the user to edit all benefit plans for the specified investment type.

**Type:** Global

**<Investment> - Benefit Plan - View**

Allows the user to view the benefit plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Benefit Plan - View All**

Allows the user to view all benefit plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - Approve**

Allows the user to approve the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - Approve All**

Allows the user to approve all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - Edit**

Allows the user to edit the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - Edit All**

Allows the user to edit all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - View**

Allows a resource to view the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - View All**

Allows the user to view all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Cost Plan - Edit**

Allows the user to edit the cost plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Cost Plan - Edit All**

Allows the user to edit all cost plans for the specified investment type.

**Type:** Global

**<Investment> - Cost Plan - View**

Allows the user to view the cost plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Cost Plan - View All**

Allows the user to view all cost plans for the specified investment type.

**Type:** Global

**Cost Plan - XOG Access**

Allows the user to import and export cost plan instances using the XML Open Gateway interface.

**Type:** Global

**Budget Plan - XOG Access**

Allows the user to import and export budget plan instances using the XML Open Gateway interface.

**Type:** Global

**Benefit Plan - XOG Access**

Allows the user to import and export benefit plan instances using the XML Open Gateway interface.

**Type:** Global

## Jobs Access Rights

The following access rights are available for managing jobs:

**Jobs - Access**

Allows users access to jobs pages. Additional rights such as the Jobs - Run - All right or instance level rights such as the Job - Run right, Job - View Output right, or Job - Edit Properties right are required.

**Type:** Global

**Job - Edit Properties**

Allows users to view and edit the job properties for specific jobs. This right also lets users reschedule jobs and view output.

**Type:** Global

**Job - Run**

Allows users to access and run jobs, edit job properties, and view job output.

**Requires:** Jobs - Access right

**Type:** Global

**Jobs - Run - All**

Allows users to run any job. This right also allows users to schedule of any job, edit of job properties for any job and view the output of any job.

**Jobs - View Output**

Allows users to view the output of the jobs to which they have access.

**Requires:** Jobs - Access right

**Type:** Global

**Jobs - View Output - All**

Allows users to view the output of any job.

**Requires:** Jobs - Access right

**Reports and Jobs - Administrator**

Allows you to view reports and manage job definitions and report and job categories.

**Type:** Global

**Reports and Jobs - Administrator Access**

Allows users to view report and job definitions. With this right, users can also view reports and jobs categories.

**Type:** Global

**Reports and Jobs - Create Definition**

Allows users to create, edit, and view report or job definitions.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

**Reports and Jobs - Edit Definition**

Allows users to view and change reports and job definitions.

**Requires:** Reports and Jobs - Administrator right

**Type:** Instance

**Reports and Jobs - Edit Definition - All**

Allows users to edit any report or job definition.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

## License Information Access Rights

To view license information, you must either be associated with the License Information Access group or be assigned each of the access rights. This access group allows users to view and navigate license information pages and portlets and includes the following access rights:

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

## Location Access Rights

You need the following access rights to work with locations.

**Location - Create**

Allows users to create locations.

**Type:** Global

**Location - Edit**

Allows users to edit specific locations.

**Type:** Instance

**Location - Edit - All**

Allows users to edit all locations.

**Type:** Global

**Location - Navigate**

Allows users to navigate to location pages.

**Type:** Global

**Location - View**

Allows users to view specific locations.

**Type:** Instance

**Location - View- All**

Allows users to view all locations.

**Type:** Global

## Page Access Rights

The following access rights are available for pages:

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Page Definition Editor**

Allows users to edit, view, and delete the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Editor - All**

Allows users to edit, view, and delete the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Definition Viewer**

Allows the user to view the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Viewer - All**

Allows the user to view the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

## Portlet Access Rights

The following access rights are available for portlets:

**Portlet Definition Editor**

Allows the user to edit and view the definition of a specific portlet.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Instance

**Portlet Definition Editor - All**

Allows a user to edit and view the definitions of all portlets available from Studio.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Global

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

## Portfolio Access Rights

The following access rights are available to resources, groups, and OBS units to create, view, and edit a portfolio:

**Portfolio - Navigate**

Allows users to access the Portfolio Management menu.

**Type:** Global

**Portfolio - Create**

Allows users to create portfolios.

**Includes:** *Portfolio - Navigate* to access Portfolio Management menu.

**Type:** Global

**Portfolio - Create Scenarios**

Allows user to create scenarios for a specific portfolio.

**Requires:**

- *Portfolio - Navigate* to access the Portfolio Management menu
- *Portfolio - View* to view a specific portfolio.

**Type:** Instance

**Portfolio - Edit**

Allows users to view, edit, and delete specific portfolio. This right also lets users change the portfolio layout and attach, modify, or delete a scenario. With this right, users can view investments, scenarios, and portlets in the portfolio to which they have access.

**Requires:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Instance

**Portfolio - Edit - All**

Allows users to view, edit, and delete all portfolios. Users can see only the investments, scenarios, and portlets to which they have access.

**Requires:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Global

**Portfolio - Edit Access Rights**

Allows users to view, edit, and delete the access rights for portfolios to which they have access.

**Requires:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Instance

**Portfolio - Edit Access Rights - All**

Allows users to view, edit, and delete the access rights for any portfolio to which they have access.

**Required:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Global

### Portfolio - Manager - Auto (Automatic)

Automatically assigned when users create an investment or are assigned as the manager of an investment. This right allows users to view, edit, and delete the portfolios they create. This right also lets users view, edit, and delete the access rights for the portfolio. The *Portfolio - Navigate* right is required.

This access right is equivalent to the *Portfolio - Edit* access right, and includes the *Portfolio - Read*, *Portfolio - Edit*, *Portfolio - Delete*, and *Portfolio - Navigate* access rights.

If you reassign the portfolio manager, this access right transfers to the new manager, and the previous manager's access rights to this portfolio is revoked.

**Type:** Instance

### Portfolio - View

Allows you to view a specific portfolio.

**Required:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Instance

### Portfolio - View - All

Allows users to view all portfolios. Users can view only investments, scenarios, and portlets in the portfolio to which they have access.

**Requires:** *Portfolio - Navigate* to access the Portfolio Management menu.

**Type:** Global

### Portfolio - View Scenarios

Allows users to view all scenarios for a specific portfolio.

**Requires:**

- *Portfolio - Navigate* to access the Portfolio Management menu.
- *Portfolio - View* to view a specific portfolio.

**Type:** Instance

## Process Access Rights

The following access rights are available to work with processes:

### Process Access

Allows the user to access the process pages.

**Type:** Global

**Process - Cancel**

Allows users to cancel process instances from a specific process definition.

**Type:** Instance

**Process - Cancel - All**

Allows users to cancel of all process instances.

**Type:** Global

**Process - Create Definition**

Allows users or OBS unit to create or change processes for any object type to which they have access. Users with this right can modify, copy, or start any process they create. Users can create processes from the *Processes* page of an object or from the Data Administration, Processes menu.

**Type:** Instance

**Process - Delete**

Allows users to delete process instances from a specific process definition.

**Type:** Instance

**Process - Delete - All**

Allows users to delete a process instance from any process definition.

**Type:** Global

**Process - Edit Definition**

Allows users to edit a specific process definition, but cannot start any process instances.

**Type:** Instance

**Process - Edit Definition - All**

Allows users to edit all process definitions. Typically, this right is given to administrators and senior executives. Users with this right cannot start processes.

**Type:** Global

**Process - Manage**

Allows users to start automatically a process instance for the process definition to which they have access. Users can also start a new process instance, delete a process instance, or cancel a process instance.

**Type:** Instance

### **Process - Manage - All**

Allows users to start automatically any process. This right is typically given to administrators and senior executives. Users with this right can change processes they create and start processes for objects to which they have access. This access right also allows users to start a new process instance, delete a process instance, or cancel a process instance.

**Type:** Global

### **Process - Start**

Allows users to start a new process instance from a specific process definition.

**Type:** Instance

### **Process - Start - All**

Allows users to start (that is, initiate) of all process instances.

**Type:** Global

### **Process View Instance - All**

Allows users to view all process instances.

**Type:** Global

### **Process - View Definition**

Allows users or an OBS unit to view the process definition from the objects to which they have access. Users with this right cannot start processes.

**Type:** Instance

### **Process - View Definition - All**

Allows users to view all process definitions. Typically, this right is administrators and senior executives. Users with this right cannot start processes.

**Type:** Global

### **Process Engine Monitoring**

Allows users to navigate to process engine monitoring and administration.

**Type:** Global

## Project Access Rights

The following access rights are required to work with projects:

### **Project - Approve**

Allows users to approve a specific project.

**Includes:** *Project - Edit* right to edit the project.

**Type:** Instance

**Project - Approve - All**

Allows users to approve all projects.

**Includes:** *Project - Edit - All* right to edit all projects.

**Type:** Global

**Project - Benefit Plan - Edit**

Allows users to edit the benefit plans for a specific project.

**Type:** Instance

**Project - Benefit Plan - Edit - All**

Allows users to edit the benefit plans for all projects.

**Type:** Global

**Project - Benefit Plan - View**

Allows users to view the benefit plans for a specific project.

**Type:** Instance

**Project - Benefit Plan - View - All**

Allows users to view the benefit plans for all projects.

**Type:** Global

**Project - Billing Access**

Allows users to access a billing for a specific project.

**Type:** Instance

**Project - Billing Approval**

Allows users to approve a billing for a specific project.

**Type:** Instance

**Project - Budget Plan - Approve**

Allows users to approve the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - Approve All**

Allows users to approve the budget plans of any project.

**Type:** Global

**Project - Budget Plan - Edit**

Allows users to edit the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - Edit All**

Allows users to edit the budget plans of any project.

**Type:** Global

**Project - Budget Plan - View**

Allows users to view the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - View All**

Allows users to view budget plans for all projects.

**Type:** Global

**Project - Cost Plan - Edit**

Allows users to edit the cost plans for a specific project.

**Type:** Instance

**Project - Cost Plan - Edit All**

Allows users to edit cost plans for all projects.

**Type:** Global

**Project - Cost Plan - View**

Allows users to view the cost plans for a specific project.

**Type:** Instance

**Project - Cost Plan - View All**

Allows users to view cost plans for all projects.

**Type:** Global

**Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Delete**

Allows users to delete a specific project.

**Requires:** *Project - View* to view the project.

**Type:** Instance

**Project - Delete - All**

Allows users to delete any project.

**Requires:** *Project - View* to view the project.

**Type:** Global

**Project - Edit**

Allows the user to edit all parts of a project.

**Type:** Instance

**Project - Edit - All**

Allows users to edit properties and other areas of any project, except for custom defined fields.

**Type:** Global

**Project - Edit Access Rights**

Allows users to manage access rights for all projects.

**Requires:** *Project - Edit Management* right to manage access rights for all projects.

**Type:** Global

**Project - Edit Assigned Tasks**

Allows the user to edit assigned tasks on a specific project.

**Type:** Instance

**Project - Edit Assigned Tasks - All**

Allows the user to edit assigned tasks on all projects.

**Type:** Global

**Project - Enable Financial**

Enable financial properties for Projects.

**Requires:**

- *Project - View*
- *Project - View Management or Project - Manager*

**Type:** Global

**Project - Edit Financial - All**

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

**Type:** Global

**Project - Edit Management**

Allows users to edit general and management properties, to add staff, create tasks, and create and manage processes for the specific project. This right includes the ability to add subprojects and to edit the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

**Project - Edit Management - All**

Allows the user to edit general and management properties for all projects. This right allows you to add staff and create tasks if projects are enabled for management. This right also includes the right to add subprojects to the project and edit the project in a project scheduler, such as Microsoft Project.

**Type:** Global

**Project - Edit Project Plan**

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

**Type:** Instance

**Project - Edit Project Plan - All**

Allows users to add unplanned tasks to any project when completing their timesheets when they are a team member of those projects.

**Type:** Global

**Project - Enable Financial**

Enable financial properties for Projects.

**Requires:**

- *Project - View*
- *Project - View Management or Project - Manager*

**Type:** Global

**Project - Financial Plan - Submit for Approval**

Allows users to submit the financial plans for approval for a specific project.

**Type:** Instance

**Project - Manager (Auto)**

Allows the user to view and edit general and management properties for the projects and programs to which they have access.

**Type:** Instance

**Project - Modify Baseline**

Allows users to edit the baseline for a specific project. This right also allows users to edit the project general properties and processes.

**Type:** Instance

**Project - Modify Baseline All**

Allows the user to edit the baseline for all project instances to which the user has edit access.

**Type:** Global

**Project - Risk, Issue, Change Request - Create/Edit**

Allows users to create and edit risks, issues, and changes for a specific project.

**Type:** Instance

**Project - Risk, Issue, Change Request - Delete**

Allows users to delete risks, issues, and changes for a specific project on which they are a staff member.

**Type:** Instance

**Project - Risk, Issue, Change Request - Delete - All**

Allows you to delete risks, issues, and change requests for all projects.

**Type:** Global

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and change requests for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - View**

Allows users to view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

### **Project - View Access Rights**

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the *Project - View* access right to the project. From Administration, users must also have the *Resource - Edit Administration* right.

**Type:** Instance

### **Project - View All Fields**

Allows users to view all the general properties and custom defined fields for a specific project.

**Type:** Instance

### **Project - View Financial**

Allows users to view the general and financial properties for a specific project.

**Type:** Instance

### **Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the *Project - Budget Plan - View All* access right.

**Type:** Global

### **Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

### **Project - View Management - All**

Allows users to view management properties and processes on any project that has been enabled for management.

**Type:** Global

### **Project - View Tasks**

Allows users to view all tasks for a specific project. This access right is dependent on the resource having the *Project - View Base* access right.

**Type:** Instance

**Project - View Tasks - All**

Allows users to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

**Projects - Navigate**

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

**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 users 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

## Resource Access Rights

The following access rights allow you to create, view, and edit resource properties.

### Administration - Resources

Allows users to navigate to the administration pages for viewing and editing resources.

**Requires:** *Resource - Edit Administration* right to view individual resources.

**Type:** Global

### Resource - Approve Time

Allows users to approve and reject timesheets for a specific resource. The right does not include the *Resource - Enter Time* right.

**Type:** Instance

### Resource - Create

Allows users to create a resource or role, and edit properties. The right allows users to create labor and nonlabor resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

### Resource - Edit

Allows users to view and edit general information, contact information, financial information, skills, and the calendar for a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

### Resource - Edit - All

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

### Resource - Edit Access Rights

Allows users to grant or revoke access rights for a specific resource.

**Requires:** The *Resource - Edit Administration* right and either the *Resource - View* or the *Resource - View - All* right

**Type:** Instance

**Resource - Edit Administration**

Allows users to edit a specific resource from administration pages.

**Requires:** *Administration - Resources* right

**Type:** Instance

**Resource - Edit Calendar**

Allows users to edit their own calendar.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit Financial**

Allows users to view general and financial properties, and to edit only the financial properties of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit Financial - All**

Allows users to view general and financial properties, and to edit only the financial properties for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Edit General**

Allows users to view and edit general information, contact information, skills, and the calendar of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit General - All**

Allows users to view and edit properties for a resource: general information, contact details, skills, and their calendar.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Enter Time**

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

**Type:** Instance

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Hard Book**

Allows users to soft and hard book a specific resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - Hard Book - All**

Allows users to soft and hard book all resources for investments to which they have view or edit rights.

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - Soft Book**

Allows users to soft book a specific resource or role to an investment.

**Type:** Instance

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - Update Skills**

Allows users to create, edit, and view the skills for a specific resource to which they have *Resource - View* access right. The privilege also allows users to view information about the resource.

**Requires:** *Resource - View* right

**Type:** Global

**Resource - Update Skills**

Allows users to create, edit, and view the skills of all resources. The privilege also allows users to view general information of resources.

**Requires:** *Resource - View* right

**Type:** Global

**Resource - View**

Allows users to view all of information for a specific resource, except for financial information.

**Type:** Instance

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Access Rights**

Allows users to view access rights for a specific resource.

**Requires:** *Resource - View* right or *Resource - Edit Administration* right

**Type:** Instance

**Resource - View Book**

Allows users to view bookings for a specific resource.

**Type:** Instance

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial**

Allows users to view general and financial information for a specific resource.

**Required:** *Resource - Navigate* right

**Type:** Instance

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

## Scenario Access Rights

**Best Practice:** Capacity planning scenarios are designed for you to view a subset of all resources or investments. Limit resources or investments through a security OBS or through instance-level resource access rights. A more manageable amount of data displays for those resources and investments you manage. Additionally, avoid accessing capacity planning scenarios as a CA Clarity PPM administrator or as a user with global access rights to all resources.

The following access rights are available to work with capacity planning scenarios:

### Scenario - Edit

Allows users to edit and delete a specific scenario.

**Includes:** *Scenario - View* and the ability to delete the Scenario

**Requires:** *Portfolio - Navigate*

**Type:** Global

### Scenario - Edit Access Rights

Allows users to edit access rights for a specific scenario.

**Requires:** *Portfolio - Navigate* right, *Portfolio - View* right, or *Scenario - View* right

**Type:** Instance

### Scenario - Manager - Automatic

When you create a scenario, access is automatically assigned. The access allows you to view, edit, and delete scenarios that you own. You can also view, edit, and delete access for that scenario.

**Type:** Global

### Scenario - Navigate

Allows users to view the Scenario toolbar on capacity planning scenario-enabled pages and create new scenarios.

**Type:** Global

### Scenario - View

Allows users to view a specific scenario.

**Requires:** *Portfolio - Navigate* right or *Portfolio - View* right.

**Type:** Instance

## 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

## Basics User Access Rights

You require the following access rights to work with this category:

- [Audit Trail Access Rights](#) (see page 21)
- [Dashboard Access Rights](#) (see page 48)
- [Knowledge Store Access Rights](#) (see page 49)
- [Page Access Rights](#) (see page 29)
- [Reports Access Rights](#) (see page 41)
- [Software Download Access Rights](#) (see page 47)
- [Timesheets Access Rights](#) (see page 47)

## 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

## 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

## 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.

## Page Access Rights

The following access rights are available for pages:

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Page Definition Editor**

Allows users to edit, view, and delete the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Editor - All**

Allows users to edit, view, and delete the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Definition Viewer**

Allows the user to view the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Viewer - All**

Allows the user to view the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

## 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 users 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

## Demand Management Access Rights

You require the following access rights to work with this category:

- [Idea Access Rights](#) (see page 52)
- [Resource Access Rights for Ideas](#) (see page 55)
- [Financial Access Rights for Ideas](#) (see page 57)
- [Incident Access Rights](#) (see page 58)

## Idea Access Rights

The following access rights are required to work with ideas:

**Idea - Approve - All**

Lets you approve all ideas.

**Type:** Global

**Idea - Approve**

Allows user to approve a specific idea.

**Type:** Instance

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Idea - Edit - All**

Lets you edit all ideas. The access right includes the Idea - View access and the ability to delete all ideas.

**Type:** Global

**Idea - Edit**

Allows user to edit a specific idea. The access right includes the *Idea - View* access right and the ability to delete a specific idea. The right does not include the *Ideas - Navigate* access right.

**Type:** Instance

**Idea - Edit Access Rights - All**

Lets you edit the access rights for all ideas. The right does not include the Ideas - Navigate or Idea - View access.

**Type:** Global

**Idea - Edit Access Rights**

Allows user to edit the access rights for a specific idea. The right does not include the *Ideas - Navigate* or *Idea - View* access rights

**Type:** Instance

**Idea - Hierarchy - Parents - Add - All**

Lets you add investments to the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - Add**

Allows users to add investments to the Parent Hierarchy for a specific idea.

**Type:** Instance

**Idea - Hierarchy - Parents - Edit - All**

Lets you edit investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - Edit**

Allows users to edit investments in the Parent Hierarchy for a specific idea.

**Type:** Instance

**Idea - Hierarchy - Parents - View - All**

Lets you view investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - View**

Allows user to view investments in the Parent Hierarchy for a specific idea.

**Type:** Instance

**Idea - Initiator (Auto)**

The right is automatically granted to the initiator of the idea.

**Type:** Instance

**Idea - Manager (Auto)**

The right is automatically granted to the manager of the idea. The right includes the *Idea - Hierarchy - Parents - View* access right. Users with the right can edit existing staff allocations.

**Type:** Instance

**Ideas - Navigate**

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

**Type:** Global

**Idea - View**

Allows user to view a specific idea. The right does not include the *Ideas - Navigate* access right.

**Type:** Instance

**Idea - View - All**

Lets you view all ideas. The right includes the Ideas - Navigate access.

**Type:** Global

**Idea - Hierarchy - Parents - View - All**

Lets you view investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - View**

Allows user to view investments in the Parent Hierarchy for a specific idea.

**Type:** Instance

**Idea - View - All**

Lets you view all ideas. The right includes the Ideas - Navigate access.

**Type:** Global

**Idea - View**

Allows user to view a specific idea. The right does not include the *Ideas - Navigate* access right.

**Type:** Instance

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the *Ideas - Navigate* access.

**Type:** Global

**Ideas - Navigate**

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

**Type:** Global

## Idea Resource Roles

No idea-specific roles exist in CA Clarity PPM. You can add the appropriate roles to work with ideas based on the instance and global access rights provided. For example, you can set up the following roles to work with ideas:

**Manager**

The idea manager has implicit access rights to the ideas created.

**Approver**

The approver of the idea has access to approve or reject ideas, or to set ideas as incomplete.

## Resource Access Right for Ideas

The following resource rights are also available when managing ideas:

**Resource - Approve Ideas**

Allows the user to approve Ideas for a specific Resource. Includes the *Resource - Edit Ideas* access right.

**Type:** Instance

**Resource - Approve Ideas - All**

Lets the user approve Ideas for all Resources. Includes the *Resource - Edit Ideas - All* access right.

**Type:** Global

**Resource - Edit Ideas**

Allows the user to edit and delete ideas for a specific Resource. Includes the *Resource - View Ideas* access right but not the *Ideas - Navigate* access right.

**Type:** Instance

**Resource - Edit Ideas - All**

Allows the user to edit and delete ideas for all resources and the *Resource - View Ideas - All* access right.

**Type:** Global

**Resource - Enter Time**

The right allows the user to complete, submit, and reject timesheets for a resource. The Timesheets link appears on the Personal page.

**Type:** Instance

**Resource - Self (Auto)**

The right is automatically granted to the resource and includes the *Resource - Edit Ideas* access right.

**Type:** Instance

**Resource - View Ideas**

Allows the user to view ideas for a specific resource. Includes the ability to delete Ideas, but does not include the *Ideas - Navigate* access right.

**Type:** Instance

**Resource - View Ideas - All**

Allows the user to view ideas for all resources. Includes the ability to delete ideas and the *Ideas - Navigate* access right.

**Type:** Global

## Financial Access Rights for Ideas

You require the following access rights to work with the financial plans for ideas:

**Idea - View Financial Information All**

Allows resources to view financial properties of all ideas.

**Idea - Edit Financial Information All**

Allows resources to edit financial properties of all ideas.

**Note:** This right allows the resource to view the Financial subpage only for those ideas to which the resource has access. This access right does not allow the resource to view all the ideas.

**Idea - Benefit Plan - Edit All**

Allows resource to edit all the Idea benefit plans.

**Idea - Benefit Plan - View All**

Allows resource to view all the Idea benefit plans.

**Idea - Budget Plan - Approve All**

Allows resource to approve all the Idea budget plans.

**Idea - Budget Plan - Edit All**

Allows resource to edit all the Idea budget plans.

**Idea - Budget Plan - View All**

Allows resource to view all the Idea budget plans.

**Idea - Cost Plan - Edit All**

Allows resource to edit all the Idea cost plans.

**Idea - Cost Plan - View All**

Allows resource to view all the Idea cost plans.

**Idea - Financial Plan - Submit All for Approval**

Allows resource to submit all the Idea financial plans for approval.

## Incident Access Rights

Incidents are typically short-lived. You can have many incidents at any given time. The access rights to incidents are governed from incident categories. You can see only the incidents mapped to categories to which you have access rights. Your CA Clarity PPM administrator can assign access rights to incidents, or the Incident Manager can assign access rights within the incident instance.

The following access rights are required to work with incidents and incident categories:

### **Incidents - Access**

Allows the user to access the incident pages.

**Type:** Global

### **Incidents - Administrate**

Allows the user to access the incident administration pages, and administer the category-investment mapping, category-group mapping, and priority setup.

**Type:** Global

### **Incidents - Create**

Allows the user to create and edit incidents, giving limited access to the incident properties. Includes the *Incidents - Access* access right.

**Type:** Global

### **Incident - Create/Edit**

Allows the user to create new incidents and edit a specific incident.

**Type:** Instance

### **Incidents - Create/Edit - All**

Allows the user to create and edit incidents on the incident pages. Includes the *Incidents - Access* and *Incidents - Select Category - All* access rights.

**Type:** Global

### **Incidents - Manage Category Incidents**

Allows the user to manage incidents mapped to a specific category. Includes the *Incidents - Select Category* access right.

**Type:** Instance

### **Incidents - Override Priority**

Allows the user to override the priority of the incident to which the user has access. Resources with the access right can view the Override Priority field on the Incident Properties page.

**Type:** Global

**Incidents - Select Category**

Allows a resource to select a specific incident category.

**Type:** Instance

**Incidents - Select Category - All**

Allows the user to select all categories on the incident pages. Includes the *Incidents - Access* access right.

**Type:** Global

## Incident Resource Roles

No default incident-specific roles exist. You can add the appropriate roles to work with incidents based on the instance and global access rights provided. For example, you can set up the following roles to work with incidents:

| Role             | Role Description                                                                                                                                                                                                                                                                                                                                                                                                                 | Access Right                                           |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| IT Administrator | Assign this role to resources responsible for setting up, administering, and mapping incident categories and financial settings for incidents from the Administration menu. Resources with this role are also responsible for assigning investments to incident categories. IT administrators determine which resources need incident access rights and the incident access rights that requires to be granted to the resources. | Incidents - Administrative;<br>Administration - Access |
| IT Manager       | Assign this role to resources responsible for assigning incidents. With this role, a resource can view new incidents, assign them to IT workers, and when necessary, reassign unresolved incidents to another resource or group.                                                                                                                                                                                                 | Incidents - Create/Edit - All                          |

| Role      | Role Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Access Right                                                                                                                    |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| IT Worker | Assign this role to resources responsible for working on and resolving incidents. With this role, a resource can create, view and assign appropriately all incidents within a specific set of incident categories. The default page that appears for an IT worker is Assigned to Me. This page displays those incidents that have been assigned to the IT worker. When an incident requires converting into a project or a project task, the IT worker flags the incident for conversion.                                                                                                                            | Incidents - Manage Category Incidents                                                                                           |
| Requestor | Assign this role to resources responsible for logging new incidents. With this role, a resource can view a prioritized work queue and record information about the nature of work performed against the reported incident. Those incidents logged by a requestor are displayed on the Reported by Me page. When a requestor is assigned to an incident, the Assigned to Me page appears and displays a list of those incidents.<br><br>Requestors have a limited view of the incident properties. They can view the incident public notes, tracking ID, short description, detailed description, type, and category. | Incidents - Create; either Incidents - Select Category - All or, Incidents - Select Category for at least one incident category |

## Financial Management Access Rights

You require the following access rights to work with this category:

- [Financial Administration Access Rights](#) (see page 24)
- [Financial Management Access Rights](#) (see page 24)
- [Financial Planning Access Rights](#) (see page 24)
- [Department Access Rights](#) (see page 22)
- [Location Access Rights](#) (see page 28)

## Financial Administration Access Rights

Users must be granted the following access rights if they are responsible for setting up structures:

### **Administration - Access**

Allows the user to access the Administration menu.

**Type:** Global

### **Financial Maintenance - Financial Organizational Structure**

Allows users to define the financial organizational structure and fiscal time periods. You can create, edit, and view entities, locations, departments, resource classes, transaction classes, and investment classes. Users can also assign departments to locations.

**Required:** Administration - Navigate

**Type:** Global

## Financial Management Access Rights

This section lists the access rights required for doing the following tasks:

- Setting up financial data
- Processing and monitoring transactions
- Processing and monitoring the financial cost/rate matrix

### **Financial Maintenance - Financial Management**

Allows users to access financial management setup features in the Administration menu.

**Type:** Global

## Financial Planning Access Rights

Users must have the following access rights for managing cost, benefit, and budget financial plans for any investment type.

**<Investment> - Benefit Plan - Edit**

Allows the user to edit the benefit plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Benefit Plan - Edit All**

Allows the user to edit all benefit plans for the specified investment type.

**Type:** Global

**<Investment> - Benefit Plan - View**

Allows the user to view the benefit plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Benefit Plan - View All**

Allows the user to view all benefit plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - Approve**

Allows the user to approve the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - Approve All**

Allows the user to approve all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - Edit**

Allows the user to edit the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - Edit All**

Allows the user to edit all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Budget Plan - View**

Allows a resource to view the budget plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Budget Plan - View All**

Allows the user to view all budget plans for the specified investment type.

**Type:** Global

**<Investment> - Cost Plan - Edit**

Allows the user to edit the cost plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Cost Plan - Edit All**

Allows the user to edit all cost plans for the specified investment type.

**Type:** Global

**<Investment> - Cost Plan - View**

Allows the user to view the cost plans for a specific instance of the selected investment type.

**Type:** Instance

**<Investment> Cost Plan - View All**

Allows the user to view all cost plans for the specified investment type.

**Type:** Global

**Cost Plan - XOG Access**

Allows the user to import and export cost plan instances using the XML Open Gateway interface.

**Type:** Global

**Budget Plan - XOG Access**

Allows the user to import and export budget plan instances using the XML Open Gateway interface.

**Type:** Global

**Benefit Plan - XOG Access**

Allows the user to import and export benefit plan instances using the XML Open Gateway interface.

**Type:** Global

## Department Access Rights

You need the following access rights to work with departments.

### **Department - Create**

Allows users to create departments.

**Includes:** *Department - Navigate* right

**Type:** Global

### **Department - Edit**

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

### **Department - Edit - All**

Allows users to edit and delete all departments.

**Includes:** *Department - View - All* right

**Type:** Global

### **Department - Edit Access Rights**

Allows users to edit the access rights for a specific department.

**Requires:** *Department - Navigate* right and *Department - View* right

**Type:** Instance

### **Department - Edit Access Rights - All**

Allows users to edit access rights for all departments.

**Requires:** *Department - Navigate* right and *Department - View* right

**Type:** Global

### **Department - Navigate**

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

### **Department - View**

Allows users to view specific departments.

**Requires:** *Department - Navigate* right

**Type:** Instance

**Department - View - All**

Allows users to view all departments.

**Includes:** *Department - Navigate* right

**Type:** Global

## Location Access Rights

You need the following access rights to work with locations.

**Location - Create**

Allows users to create locations.

**Type:** Global

**Location - Edit**

Allows users to edit specific locations.

**Type:** Instance

**Location - Edit - All**

Allows users to edit all locations.

**Type:** Global

**Location - Navigate**

Allows users to navigate to location pages.

**Type:** Global

**Location - View**

Allows users to view specific locations.

**Type:** Instance

**Location - View- All**

Allows users to view all locations.

**Type:** Global

## IT Service Management Access Rights

You require the following access rights to work with this category:

- [Service Access Rights](#) (see page 66)
- [BRM Accelerator Access Rights](#) (see page 68)

## Service Access Rights

Before you begin working with services, you must have the necessary access rights. If you require access to additional modules, contact your CA Clarity PPM administrator.

The following access rights are available to access, view, or edit services:

### **Service - Approve All**

Allows resource to approve all instances of this object type.

**Type:** Global

### **Service - Create**

Lets the resource create service. This access right includes the right to navigate to the service pages.

**Type:** Global

### **Service - Edit**

Lets the resource edit only selected service. Includes the ability to delete the service.

**Type:** Instance

### **Service - Edit - All**

Lets the user edit all Services. Includes the ability to delete Services, and the Service - View - All access right.

**Type:** Global

### **Service - Edit Access Rights**

Allows resource to edit only selected service access rights.

**Type:** Instance

### **Service - Edit Access Rights - All**

Lets the user edit the access rights for all Services. Does not include the Service - Navigate or Service - View access rights.

**Type:** Global

### **Service - Edit Allocation Information**

Allows resource to edit chargeback rules only for selected service.

**Type:** Instance

### **Service - Edit Chargebacks Information**

Allows user to edit chargeback rules for service.

**Type:** Instance

**Service - Edit Chargebacks Information All**

Allows user to edit chargeback rules for service.

**Type:** Global

**Service - Modify Baseline**

Allows resource to baseline only selected service. The access right requires to be granted with the Service - Edit access right.

**Type:** Instance

**Service Investment - Modify Baseline - All**

Lets the resource baseline all services. The access right requires to be granted with the Service - Edit - All access right

**Type:** Global

**Service - Navigate**

Lets the user navigate to Service pages. The user requires additional access rights to view individual Services.

**Type:** Global

**Service - Reverse Charges**

Allows resource to reverse charges only for selected service.

**Type:** Instance

**Service - View**

Lets the resource view only the selected service.

**Type:** Instance

**Service - View - All**

Lets the user view all Services. Includes the Service - Navigate access right.

**Type:** Global

**Service - View Allocations**

Allows resource to view allocations only for selected service.

**Type:** Instance

**Service - View Allocations - All**

Allows resource to access chargebacks for all services.

**Type:** Global

**Service - View Chargebacks Information**

Allows user to view chargeback rules for service.

**Type:** Instance

**Service - View Chargebacks Information All**

Allows user to view chargeback rules for service.

**Type:** Global

**Service Investment - Modify Baseline - All**

Allows a resource to baseline all service investments. The access right also allows a resource to view the general properties and processes for service investments.

**Type:** Global

## BRM Accelerator Access Rights

To work with the BRM Accelerator, you require the necessary access rights. If you find that you require access to additional modules, contact your CA Clarity PPM administrator.

The business relationship manager is assigned when defining the department properties. The business relationship manager then determines who has access to Provider or Customer portlets. For example, a user can be assigned as the BRM on the customer departments, but the IT manager can be assigned as the BRM on the provider departments. The IT manager does not see the data that the BRM sees on the customer department dashboard, and likewise with the BRM.

You require the following access rights to work with BRM Accelerator:

- [BRM Accelerator Access Rights](#) (see page 68)
- [Customer Department Manager Access Rights](#) (see page 70)
- [IT Manager Access Rights](#) (see page 72)
- [Service Manager Access Rights](#) (see page 73)
- [Provider Department Manager Access Rights](#) (see page 74)

## BRM Accelerator Access Rights

You require the following access rights to view and to navigate the BRM Accelerator dashboards and portlets:

**Department - Edit**

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

**Department - Navigate**

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

**Department - View Chargeback Information**

Lets the user view invoices and recovery statements of specific departments.

**Type:** Instance

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Ideas - Navigate**

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

**Type:** Global

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Service - Create**

Lets the resource create service. This access right includes the right to navigate to the service pages.

**Type:** Global

**Service - Edit - All**

Lets the user edit all Services. Includes the ability to delete Services, and the Service - View - All access right.

**Type:** Global

### **Service - Edit Access Rights - All**

Lets the user edit the access rights for all Services. Does not include the Service - Navigate or Service - View access rights.

**Type:** Global

### **Service Investment - Modify Baseline - All**

Lets the resource baseline all services. The access right requires to be granted with the Service - Edit - All access right

**Type:** Global

### **Service - Navigate**

Lets the user navigate to Service pages. The user requires additional access rights to view individual Services.

**Type:** Global

### **Service - View - All**

Lets the user view all Services. Includes the Service - Navigate access right.

**Type:** Global

### **Resource - Approve Ideas - All**

Lets the user approve Ideas for all Resources. Includes the *Resource - Edit Ideas - All* access right.

**Type:** Global

## Customer Department Manager Access Rights

The following access rights are required for a Customer Department Manager:

### **Department - Edit**

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

### **Department - Navigate**

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

### **Department - View Chargeback Information**

Lets the user view invoices and recovery statements of specific departments.

**Type:** Instance

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Ideas - Navigate**

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

**Type:** Global

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Resource - Approve Ideas - All**

Lets the user approve Ideas for all Resources. Includes the *Resource - Edit Ideas - All* access right.

**Type:** Global

**Service - Edit**

Lets the resource edit only selected service. Includes the ability to delete the service.

**Type:** Instance

**Service - View**

Lets the resource view only the selected service.

**Type:** Instance

## IT Manager Access Rights

The following instance-level access rights are required for an IT Manager:

### Department - Edit

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

### Department - Navigate

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

### Department - View Chargeback Information

Lets the user view invoices and recovery statements of specific departments.

**Type:** Instance

### Ideas - Navigate

Lets the user navigate to the Ideas pages to include the right to view the Ideas link.

**Type:** Global

### Page Viewer - All

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

### Portlet Viewer - All

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

### Service - Create

Lets the resource create service. This access right includes the right to navigate to the service pages.

**Type:** Global

**Service - Edit - All**

Lets the user edit all Services. Includes the ability to delete Services, and the Service - View - All access right.

**Type:** Global

**Service - Edit Access Rights - All**

Lets the user edit the access rights for all Services. Does not include the Service - Navigate or Service - View access rights.

**Type:** Global

**Service - Navigate**

Lets the user navigate to Service pages. The user requires additional access rights to view individual Services.

**Type:** Global

**Service - View - All**

Lets the user view all Services. Includes the Service - Navigate access right.

**Type:** Global

**Service Investment - Modify Baseline - All**

Allows a resource to baseline all service investments. The access right also allows a resource to view the general properties and processes for service investments.

**Type:** Global

## Service Manager Access Rights

The following access rights are required for a Service Manager:

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

**Department - View**

Allows users to view specific departments.

**Requires:** *Department - Navigate* right

**Type:** Instance

**Department - View Chargeback Information**

Lets the user view invoices and recovery statements of specific departments.

**Type:** Instance

### **Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

### **Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

### **Service - Edit**

Lets the resource edit only selected service. Includes the ability to delete the service.

**Type:** Instance

### **Service - Navigate**

Lets the user navigate to Service pages. The user requires additional access rights to view individual Services.

**Type:** Global

### **Service - View**

Lets the resource view only the selected service.

**Type:** Instance

## Provider Department Manager Access Rights

The following access rights are required for a Provider Department Manager:

### **Department - Edit**

Lets the user edit and delete specific departments.

**Includes:** *Department - View* access right

**Requires:** *Department - Navigate* right

**Type:** Instance

### **Department - Navigate**

Lets the user navigate to department pages.

**Requires:** *Department - View - All* right

**Type:** Global

**Department - View Chargeback Information**

Lets the user view invoices and recovery statements of specific departments.

**Type:** Instance

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Service - Edit**

Lets the resource edit only selected service. Includes the ability to delete the service.

**Type:** Instance

**Service - Navigate**

Lets the user navigate to Service pages. The user requires additional access rights to view individual Services.

**Type:** Global

**Service - View**

Lets the resource view only the selected service.

**Type:** Instance

## Project Management Access Rights

You require the following access rights to work with this category:

- [Earned Value Definition Access Rights](#) (see page 23)
- [Program Access Rights](#) (see page 76)
- [Project Access Rights](#) (see page 34)
- [Project Hierarchy Access Rights](#) (see page 84)
- [Timesheets Access Rights](#) (see page 47)

## Earned Value Definition Access Rights

The following access rights are required to work with earned value definitions:

### **Earned Value Definition - Create**

Allows users to create a new earned value definition.

**Type:** Global

### **Earned Value Definition - Edit Access Rights - All**

Allows users to edit the access rights for all earned value definitions.

**Requires:** *Earned Value Definition - Navigate* right or *Earned Value Definition - View* right

**Type:** Global

### **Earned Value Definition - Edit All**

Allows users to edit any earned value definition.

**Type:** Global

### **Earned Value Definition - Navigate**

Allows users to access any earned value definition pages.

**Type:** Global

### **Earned Value Definition - View All**

Allows users to view any earned value definition.

**Type:** Global

## Program Access Rights

The following access rights are available for users who create and edit programs and subprojects:

### **Management - Programs**

Allows user to access the programs to which you have access. This right is dependent on the user having rights to programs and projects at either the instance level or OBS level.

**Type:** Global

### **Project - Approve**

Allows the user to approve a specific project. This right includes the *Project - Edit* access right.

**Type:** Instance

**Project - Create**

Allows user to create a project or program specifying general project properties. A user with this right automatically becomes the collaboration manager for the project. The user can also create action items and discussion. This access right includes the *Project - Create from Template* access right.

**Type:** Global

**Project - Create from Template**

Allows user to create a new project or program using only templates. A user with this right automatically becomes the collaboration manager for the project. The user can create action items and discussion.

**Type:** Global

**Project - Delete**

Combined with the *Project - Edit* access right, this right allows users to delete the projects and programs to which they have access.

**Project - Edit**

Allows user to edit all parts of a project or program except the collaboration tools (e.g. Document Manager, Action Items, Calendar, and Discussion pages). Also, allows user to accept requisitions if project manager approval is required.

**Type:** Instance

**Project - Edit Access Rights**

Combined with the *Project - Edit Management* access right, this right allows user to manage access rights to a project or program.

**Type:** Global

**Project - Edit Management**

Allows user to edit general and management properties, to add staff, create tasks, and create and manage processes for the projects and programs to which the user has access. This includes the ability to add subprojects and to edit the project in Open Workbench or Microsoft Project.

**Type:** Instance.

**Project - Manager (Auto)**

Allows user to view and edit general and management properties for the projects and programs to which they have access.

**Type:** Instance

## Project Access Rights

The following access rights are required to work with projects:

### **Project - Approve**

Allows users to approve a specific project.

**Includes:** *Project - Edit* right to edit the project.

**Type:** Instance

### **Project - Approve - All**

Allows users to approve all projects.

**Includes:** *Project - Edit - All* right to edit all projects.

**Type:** Global

### **Project - Benefit Plan - Edit**

Allows users to edit the benefit plans for a specific project.

**Type:** Instance

### **Project - Benefit Plan - Edit - All**

Allows users to edit the benefit plans for all projects.

**Type:** Global

### **Project - Benefit Plan - View**

Allows users to view the benefit plans for a specific project.

**Type:** Instance

### **Project - Benefit Plan - View - All**

Allows users to view the benefit plans for all projects.

**Type:** Global

### **Project - Billing Access**

Allows users to access a billing for a specific project.

**Type:** Instance

### **Project - Billing Approval**

Allows users to approve a billing for a specific project.

**Type:** Instance

### **Project - Budget Plan - Approve**

Allows users to approve the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - Approve All**

Allows users to approve the budget plans of any project.

**Type:** Global

**Project - Budget Plan - Edit**

Allows users to edit the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - Edit All**

Allows users to edit the budget plans of any project.

**Type:** Global

**Project - Budget Plan - View**

Allows users to view the budget plans for a specific project.

**Type:** Instance

**Project - Budget Plan - View All**

Allows users to view budget plans for all projects.

**Type:** Global

**Project - Cost Plan - Edit**

Allows users to edit the cost plans for a specific project.

**Type:** Instance

**Project - Cost Plan - Edit All**

Allows users to edit cost plans for all projects.

**Type:** Global

**Project - Cost Plan - View**

Allows users to view the cost plans for a specific project.

**Type:** Instance

**Project - Cost Plan - View All**

Allows users to view cost plans for all projects.

**Type:** Global

**Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Delete**

Allows users to delete a specific project.

**Requires:** *Project - View* to view the project.

**Type:** Instance

**Project - Delete - All**

Allows users to delete any project.

**Requires:** *Project - View* to view the project.

**Type:** Global

**Project - Edit**

Allows the user to edit all parts of a project.

**Type:** Instance

**Project - Edit - All**

Allows users to edit properties and other areas of any project, except for custom defined fields.

**Type:** Global

**Project - Edit Access Rights**

Allows users to manage access rights for all projects.

**Requires:** *Project - Edit Management* right to manage access rights for all projects.

**Type:** Global

**Project - Edit Assigned Tasks**

Allows the user to edit assigned tasks on a specific project.

**Type:** Instance

**Project - Edit Assigned Tasks - All**

Allows the user to edit assigned tasks on all projects.

**Type:** Global

#### **Project - Enable Financial**

Enable financial properties for Projects.

##### **Requires:**

- *Project - View*
- *Project - View Management or Project - Manager*

**Type:** Global

#### **Project - Edit Financial - All**

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

**Type:** Global

#### **Project - Edit Management**

Allows users to edit general and management properties, to add staff, create tasks, and create and manage processes for the specific project. This right includes the ability to add subprojects and to edit the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

#### **Project - Edit Management - All**

Allows the user to edit general and management properties for all projects. This right allows you to add staff and create tasks if projects are enabled for management. This right also includes the right to add subprojects to the project and edit the project in a project scheduler, such as Microsoft Project.

**Type:** Global

#### **Project - Edit Project Plan**

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

**Type:** Instance

#### **Project - Edit Project Plan - All**

Allows users to add unplanned tasks to any project when completing their timesheets when they are a team member of those projects.

**Type:** Global

**Project - Enable Financial**

Enable financial properties for Projects.

**Requires:**

- *Project - View*
- *Project - View Management* or *Project - Manager*

**Type:** Global

**Project - Financial Plan - Submit for Approval**

Allows users to submit the financial plans for approval for a specific project.

**Type:** Instance

**Project - Manager (Auto)**

Allows the user to view and edit general and management properties for the projects and programs to which they have access.

**Type:** Instance

**Project - Modify Baseline**

Allows users to edit the baseline for a specific project. This right also allows users to edit the project general properties and processes.

**Type:** Instance

**Project - Modify Baseline All**

Allows the user to edit the baseline for all project instances to which the user has edit access.

**Type:** Global

**Project - Risk, Issue, Change Request - Create/Edit**

Allows users to create and edit risks, issues, and changes for a specific project.

**Type:** Instance

**Project - Risk, Issue, Change Request - Delete**

Allows users to delete risks, issues, and changes for a specific project on which they are a staff member.

**Type:** Instance

**Project - Risk, Issue, Change Request - Delete - All**

Allows you to delete risks, issues, and change requests for all projects.

**Type:** Global

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and change requests for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - View**

Allows users to view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Access Rights**

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the *Project - View* access right to the project. From Administration, users must also have the *Resource - Edit Administration* right.

**Type:** Instance

**Project - View All Fields**

Allows users to view all the general properties and custom defined fields for a specific project.

**Type:** Instance

**Project - View Financial**

Allows users to view the general and financial properties for a specific project.

**Type:** Instance

**Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the *Project - Budget Plan - View All* access right.

**Type:** Global

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

### **Project - View Management - All**

Allows users to view management properties and processes on any project that has been enabled for management.

**Type:** Global

### **Project - View Tasks**

Allows users to view all tasks for a specific project. This access right is dependent on the resource having the *Project - View Base* access right.

**Type:** Instance

### **Project - View Tasks - All**

Allows users to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

### **Projects - Navigate**

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

**Type:** Global

## Project Hierarchy Access Rights

The following access rights are available to work with project hierarchy:

### **Project - Hierarchy - Financial Rollup - Add - All**

Allows users to add investments to Financial Rollup Hierarchy for any investment.

### **Project - Hierarchy - Financial Rollup - Edit - All**

Allows users to edit the Financial Rollup Hierarchy for any investment.

### **Project - Hierarchy - Financial Rollup - View - All**

Allows user to view Financial Rollup for any investment of this type.

### **Project - Hierarchy - Parents - Add - All**

Allows users to add investments to Parents Hierarchy for any investment.

### **Project - Hierarchy - Parents - Edit - All**

Allows users to edit the Parents Hierarchy for any investment.

## 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

## Portfolio Management Access Rights

Users require the new Portfolio access rights after the upgrade. Without the assignment of the new Portfolio access rights, users cannot see the Portfolio menu links after logging in to the application. The system administrator must manually assign users rights. No automatic assignment of new rights for users who had the old Portfolio rights is available.

**Upgrade Action:** Assign access rights for the new Portfolio feature to the users who require them.

The following access rights are required to work with portfolios:

**Portfolio - Create**

Allows a user to create Portfolios.

**Includes:** *Portfolio - Navigate* right to navigate to the portfolio pages.

**Type:** Instance

**Portfolio - Navigate**

Lets a user access the portfolio pages.

**Type:** Instance

**Portfolio - Edit All**

Lets a user edit all Portfolios.

**Type:** Global

**Portfolio - Edit Access Rights - All**

Lets a user edit the access rights for all portfolios. This access right does not include the *Portfolio - Navigate* or *Portfolio - View* rights.

**Type:** Global

**Portfolio - View Access Rights - All**

Lets a user view the access rights for all portfolios. This access right does not include the *Portfolio - Navigate* or *Portfolio - View* rights.

**Type:** Global

**Portfolio - View All**

Lets a user view all portfolios.

**Type:** Global

**Portfolio - XOG Access**

Lets a user import and export portfolio instances using the XML Open Gateway interface.

**Type:** Instance

You can select a user as a Manager or a Stakeholder on a portfolio's properties page. Being selected as a Manager or Stakeholder automatically a user the following rights to the portfolio:

- Manager. This user can edit information in the portfolio.
- Stakeholder. This user can only view information in the portfolio.

No access rights apply to the investments and plans that are contained in a portfolio. If you have rights to view or edit a portfolio, you can view or edit all investments and plans in the portfolio.

## Resource Management Access Rights

You require the following access rights to work with this category:

- [Resource Access Rights](#) (see page 42)
- [Additional Access Rights for Requisitions](#) (see page 90)
- [Scenario Access Rights \(Capacity Planning\)](#) (see page 46)

## Resource Access Rights

The following access rights allow you to create, view, and edit resource properties.

### **Administration - Resources**

Allows users to navigate to the administration pages for viewing and editing resources.

**Requires:** *Resource - Edit Administration* right to view individual resources.

**Type:** Global

### **Resource - Approve Time**

Allows users to approve and reject timesheets for a specific resource. The right does not include the *Resource - Enter Time* right.

**Type:** Instance

### **Resource - Create**

Allows users to create a resource or role, and edit properties. The right allows users to create labor and nonlabor resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

### **Resource - Edit**

Allows users to view and edit general information, contact information, financial information, skills, and the calendar for a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

### **Resource - Edit - All**

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

### **Resource - Edit Access Rights**

Allows users to grant or revoke access rights for a specific resource.

**Requires:** The *Resource - Edit Administration* right and either the *Resource - View* or the *Resource - View - All* right

**Type:** Instance

**Resource - Edit Administration**

Allows users to edit a specific resource from administration pages.

**Requires:** *Administration - Resources* right

**Type:** Instance

**Resource - Edit Calendar**

Allows users to edit their own calendar.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit Financial**

Allows users to view general and financial properties, and to edit only the financial properties of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit Financial - All**

Allows users to view general and financial properties, and to edit only the financial properties for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Edit General**

Allows users to view and edit general information, contact information, skills, and the calendar of a resource.

**Requires:** *Resource - Navigate* right

**Type:** Instance

**Resource - Edit General - All**

Allows users to view and edit properties for a resource: general information, contact details, skills, and their calendar.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - Enter Time**

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

**Type:** Instance

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Hard Book**

Allows users to soft and hard book a specific resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - Hard Book - All**

Allows users to soft and hard book all resources for investments to which they have view or edit rights.

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - Soft Book**

Allows users to soft book a specific resource or role to an investment.

**Type:** Instance

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - Update Skills**

Allows users to create, edit, and view the skills for a specific resource to which they have *Resource - View* access right. The privilege also allows users to view information about the resource.

**Requires:** *Resource - View* right

**Type:** Global

**Resource - Update Skills**

Allows users to create, edit, and view the skills of all resources. The privilege also allows users to view general information of resources.

**Requires:** *Resource - View* right

**Type:** Global

**Resource - View**

Allows users to view all of information for a specific resource, except for financial information.

**Type:** Instance

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Access Rights**

Allows users to view access rights for a specific resource.

**Requires:** *Resource - View* right or *Resource - Edit Administration* right

**Type:** Instance

**Resource - View Book**

Allows users to view bookings for a specific resource.

**Type:** Instance

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial**

Allows users to view general and financial information for a specific resource.

**Required:** *Resource - Navigate* right

**Type:** Instance

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

## Additional Access Rights for Requisitions

In addition to Resource access rights, you may need the following rights to manage requisitions:

**Project - Attach Requisitions Resources**

Lets you attach resources to requisition entries and includes adding, editing, proposing, or deleting resources from the request results page. The privilege lets users to change project statuses to "Proposed" and "Booked". This right includes the Project – View Requisitions access.

**Type:** Instance

**Project - Create/Edit Requisitions**

Allows you to create new requisitions, edit existing requisitions, and delete requisitions. Also, allows you to view the requisition resources and change a requisition status at any time. With this access right, if you also have the *Project - Edit* rights, then you can also accept requisitions.

**Type:** Global

**Project - View Requisitions**

Allows the user to view requisitions and the requisition resources.

**Type:** Global

**Process - Create Definition**

Allows you to create new process definitions for a requisition.

**Type:** Global

**Process - Initiate**

Allows you to start a new process instance for a requisition.

**Type:** Global

## Scenario Access Rights

**Best Practice:** Capacity planning scenarios are designed for you to view a subset of all resources or investments. Limit resources or investments through a security OBS or through instance-level resource access rights. A more manageable amount of data displays for those resources and investments you manage. Additionally, avoid accessing capacity planning scenarios as a CA Clarity PPM administrator or as a user with global access rights to all resources.

The following access rights are available to work with capacity planning scenarios:

**Scenario - Edit**

Allows users to edit and delete a specific scenario.

**Includes:** *Scenario - View* and the ability to delete the Scenario

**Requires:** *Portfolio - Navigate*

**Type:** Global

**Scenario - Edit Access Rights**

Allows users to edit access rights for a specific scenario.

**Requires:** *Portfolio - Navigate* right, *Portfolio - View* right, or *Scenario - View* right

**Type:** Instance

**Scenario - Manager - Automatic**

When you create a scenario, access is automatically assigned. The access allows you to view, edit, and delete scenarios that you own. You can also view, edit, and delete access for that scenario.

**Type:** Global

**Scenario - Navigate**

Allows users to view the Scenario toolbar on capacity planning scenario-enabled pages and create new scenarios.

**Type:** Global

**Scenario - View**

Allows users to view a specific scenario.

**Requires:** *Portfolio - Navigate* right or *Portfolio - View* right.

**Type:** Instance

## Studio Access Rights

You require the following access rights to work with this category:

- [Add-in Access Rights](#) (see page 93)
- [Basic Studio Access Rights](#) (see page 93)
- [Menu Manager Access Rights](#) (see page 94)
- [Object Access Rights](#) (see page 94)
- [Partition Model Access Rights](#) (see page 95)
- [Portlet Access Rights](#) (see page 30)
- [Portlet Pages Access Rights](#) (see page 96)

## Add-in Access Rights

The following access rights can be used to work with add-ins:

### **Add-In Administer**

Allows a user to administer add-ins.

**Type:** Global

## Basic Studio Access Rights

The following basic access rights are required to access the Administration and the Studio menu:

### **Administration - Access**

Allows the user to access the Administration menu.

**Type:** Global

### **Administration - Studio**

Allows a user to navigate to Studio menus. Without this right, a user does not see the CA Clarity Studio menu in the Administration menu. This right is dependent on having a license to Studio.

**Type:** Global

## Menu Manager Access Rights

You require the following access rights to work with the menu manager:

### **Menu Definition Editor - All**

Allows a user to edit and view the definitions of all menu items for the Navigator or Administration menu.

**Type:** Global

### **Menu Definition Viewer - All**

Allows a user to view the definitions of all menu items for the Navigator or Administration menu.

**Type:** Global

**Note:** To see all menu items in Studio, you must have the following rights:

- *Administration - Access*
- *Administration - Partition Models*
- *Administration - Studio*
- *Menu Definition Viewer - All*

## Object Access Rights

The following access rights are required to work with objects in Studio:

### **Custom Objects Editor**

Allows users to edit the definition of a custom object.

**Type:** Global

### **Object - Create Definition**

Allows a user to create a custom object.

**Type:** Global

### **Object Administration**

Allows a user to administer all custom objects.

**Type:** Global

## Partition Model Access Rights

You require the following access rights to work with partitions:

### **Administration - Partition Models**

Allows users to manage partition models.

Requires: *Administration - Access*

**Type:** Global

### **System Partition - Administer**

Allows a user to administer the System partition.

**Type:** Global

## Portlet Access Rights

The following access rights are available for working with portlets:

### **Portlet Create**

Allows a user to create new portlets.

**Type:** Global

### **Portlet Definition Editor**

Allows the user to edit and view the definition of a specific portlet.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Instance

### **Portlet Definition Editor - All**

Allows a user to edit and view the definitions of all portlets available from Studio.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Global

**Portlet Navigate**

Allows a user to navigate to the portlet configuration pages.

**Type:** Global

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

## Portlet Pages Access Rights

The following rights can be used to work with portlet pages:

**Page Definition Editor**

Allows users to edit, view, and delete the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Editor - All**

Allows users to edit, view, and delete the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Definition Viewer**

Allows the user to view the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Definition Viewer - All**

Allows the user to view the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

## XOG Access Rights

### Access Rights to Run the XOG from the Client

Before using the XOG client, you must have a valid CA Clarity PPM login name and password.

You must also have one of the following access rights:

- *Administration - Access*
- *Administration - XOG*

### XOG Access Rights for Individual Objects

Before a resource can use the XOG to import or export data for a particular object, you must assign the resource the XOG access right for that object. For example, *Asset - XOG Access*, *Project - XOG Access*, *Resource - XOG Access*, and so on.

For example, you can grant the *Asset - XOG Access* right to a resource to support a custom CA Clarity PPM desktop application that needs asset information. While the resource can import and export instance data that is associated with the asset object, the resource is not able to import or export data on any other objects.

XOG access rights for objects are listed in the access rights list in the Administration Tool with other access rights. XOG access rights are global rights.

#### **Accounts Receivable Transaction - XOG Access**

Allows user to import and export Accounts Receivable Transaction instances using the XML Open Gateway interface.

#### **Action Item approval - XOG Access**

Allows user to export and approve action items using the XML Open Gateway interface.

#### **Admin Code - XOG Access**

Allows user to import and export Admin Code instances using the XML Open Gateway interface.

**Application - XOG Access**

Allows user to import and export Application instances using the XML Open Gateway interface.

**Asset - XOG Access**

Allows user to import and export Asset instances using the XML Open Gateway interface.

**Benefit Plan - XOG Access**

Allows user to import and export Benefit Plan instances using the XML Open Gateway interface.

**Budget Plan - XOG Access**

Allows user to import and export Budget Plan instances using the XML Open Gateway interface.

**Burdening Class - XOG Access**

Allows user to import and export Burdening Class instances using the XML Open Gateway interface.

**Burdening Matrix - XOG Access**

Allows user to import and export Burdening Matrix instances using the XML Open Gateway interface.

**Business Process Definition - XOG Access**

Allows user to import and export Business Process Definition instances using the XML Open Gateway interface.

**Capacity Planning Scenario - XOG Access**

Allows user to import and export Capacity Planning Scenario instances using the XML Open Gateway interface.

**Category - XOG Access**

Allows user to import and export Category instances using the XML Open Gateway interface.

**Change Request - XOG Access**

Allows user to import and export Change Request instances using the XML Open Gateway interface.

**Charge Code - XOG Access**

Allows user to import and export Charge Code instances using the XML Open Gateway interface.

**Company - XOG Access**

Allows user to import and export Company instances using the XML Open Gateway interface.

**Company Class - XOG Access**

Allows user to import and export Company Class instances using the XML Open Gateway interface.

**Content Pack - XOG Access**

Allows user to import and export Content Pack instances using the XML Open Gateway interface.

**Cost Matrix - XOG Access**

Allows user to import and export Cost Matrix instances using the XML Open Gateway interface.

**Cost Plan - XOG Access**

Allows user to import and export Cost Plan instances using the XML Open Gateway interface.

**Cost Plus - XOG Access**

Allows user to import and export Cost Plus instances using the XML Open Gateway interface.

**Department - XOG Access**

Allows user to import and export Department instances using the XML Open Gateway interface.

**Document - XOG Access**

Allows user to import and export Document instances using the XML Open Gateway interface.

**Entity - XOG Access**

Allows user to import and export Entity instances using the XML Open Gateway interface.

**EVMS Agency - XOG Access**

Allows user to import and export EVMS Agency instances using the XML Open Gateway interface.

**EVMS Contract - XOG Access**

Allows user to import and export EVMS Contract instances using the XML Open Gateway interface.

**Financial Planning - XOG Access**

Allows user to import and export Financial Planning instances using the XML Open Gateway interface.

**General Ledger Account - XOG Access**

Allows user to import and export General Ledger Account instances using the XML Open Gateway interface.

**General Ledger Transaction - XOG Access**

Allows user to import and export General Ledger Transaction instances using the XML Open Gateway interface.

**GLALLOCATION - XOG Access**

Allows user to import and export GLALLOCATION instances using the XML Open Gateway interface.

**Group - XOG Access**

Allows user to import and export Group instances using the XML Open Gateway interface.

**Idea - XOG Access**

Allows user to import and export Idea instances using the XML Open Gateway interface.

**Inbound Transaction - XOG Access**

Allows user to import and export Inbound Transaction instances using the XML Open Gateway interface.

**Incident - XOG Access**

Allows user to import and export Incident instances using the XML Open Gateway interface.

**Invoice - XOG Access**

Allows user to import and export Invoice instances using the XML Open Gateway interface.

**Issue- XOG Access**

Allows user to import and export Issue instances using the XML Open Gateway interface.

**Location - XOG Access**

Allows user to import and export Location instances using the XML Open Gateway interface.

**Lookup Mapping - Xog Access**

Allows user to import and export Lookup Mapping instances using the XML Open Gateway interface.

**Notification - XOG Access**

Allows user to import and export Notification instances using the XML Open Gateway interface.

**Notification Definition - XOG Access**

Allows user to import and export Notification Definition - instances using the XML Open Gateway interface.

**Object Mapping - XOG Access**

Allows user to import and export Object Mapping instances using the XML Open Gateway interface.

**OBS - XOG Access**

Allows user to import and export OBS instances using the XML Open Gateway interface.

**Other Investment - XOG Access**

Allows user to import and export Other Investment instances using the XML Open Gateway interface.

**Outbound Transaction - XOG Access**

Allows user to import and export Outbound Transaction instances using the XML Open Gateway interface.

**Performance Session - XOG Access**

Allows user to import and export performance session instances using the XML Open Gateway interface.

**Period Definition - XOG Access**

Allows user to import and export Period Definition instances using the XML Open Gateway interface.

**Portfolio - XOG Access**

Allows user to import and export Portfolio instances using the XML Open Gateway interface.

**Process Notification - XOG Access**

Allows user to import and export Process Notification instances using the XML Open Gateway interface.

**Product - XOG Access**

Allows user to import and export Product instances using the XML Open Gateway interface.

**Project - XOG Access**

Allows user to import and export Project instances using the XML Open Gateway interface.

**Release - XOG Access**

Allows user to import and export Release instances using the XML Open Gateway interface.

**Release Plan - XOG Access**

Allows user to import and export Release Plan instances using the XML Open Gateway interface.

**Report Label - XOG Access**

Allows user to import and export Report Label instances using the XML Open Gateway interface.

**Requirement - XOG Access**

Allows user to import and export Requirement instances using the XML Open Gateway interface.

**Requisition - XOG Access**

Allows user to import and export Requisition instances using the XML Open Gateway interface.

**Resource - XOG Access**

Allows user to import and export Resource instances using the XML Open Gateway interface.

**Resource Class - XOG Access**

Allows user to import and export Resource Class instances using the XML Open Gateway interface.

**Risk - XOG Access**

Allows user to import and export Risk instances using the XML Open Gateway interface.

**Role - XOG Access**

Allows user to import and export Role instances using the XML Open Gateway interface.

**Security - XOG Access**

Allows user to import and export Security instances using the XML Open Gateway interface.

**Service - XOG Access**

Allows user to import and export Service instances using the XML Open Gateway interface.

**Skill - XOG Access**

Allows user to import and export Skill instances using the XML Open Gateway interface.

**Status Report - Xog Access**

Allows user to import and export Status Report instances using the XML Open Gateway interface.

**Subscription - XOG Access**

Allows user to import and export Subscription instances using the XML Open Gateway interface.

**Tax Code - XOG Access**

Allows user to import and export Tax Code instances using the XML Open Gateway interface.

**Time Period - XOG Access**

Allows user to import and export Time Period instances using the XML Open Gateway interface.

**Timesheet approval - XOG Access**

Allows user to export and approve timesheets using the XML Open Gateway interface.

**Transaction - XOG Access**

Allows user to import and export Transaction instances using the XML Open Gateway interface.

**Transaction Class - XOG Access**

Allows user to import and export Transaction Class instances using the XML Open Gateway interface.

**Type Code - XOG Access**

Allows user to import and export Type Code instances using the XML Open Gateway interface.

**UI Theme - XOG Access**

Allows user to import and export UI Theme instances using the XML Open Gateway interface.

**User - XOG Access**

Allows user to import and export User instances using the XML Open Gateway interface.

**Vendor - XOG Access**

Allows user to import and export Vendor instances using the XML Open Gateway interface.

**WIP Class - XOG Access**

Allows user to import and export WIP Class instances using the XML Open Gateway interface.



# Chapter 6: Add-ins Access Rights

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This section contains the following topics:

[EVM Access Rights](#) (see page 105)

[NPD Accelerator Access Rights](#) (see page 112)

[PMBOK Guide Accelerator Access Rights](#) (see page 119)

[PMO Accelerator Access Groups](#) (see page 181)

[PPM Essentials Accelerator Access Rights](#) (see page 214)

[PRINCE2 Access Rights](#) (see page 224)

## EVM Access Rights

You require the following Earned Value Manager (EVM) specific access rights to create, edit, view, and delete earned value information.

### **Agency - Create**

Allows you to create agencies. This right includes the page navigation right.

**Type:** Global

### **Agency - Edit**

Allows you to edit a specific agency. This right does not include the Agency - Navigate access right.

**Type:** Instance

### **Agency - Edit Access Rights**

Allows you to edit access rights for a specific agency. This right does not include the Agency - Navigate or the Agency - View access rights.

**Type:** Instance

### **Agency - Edit - All**

Allows you to edit all agencies. This right includes the Agency - View - All access right.

**Type:** Global

### **Agency - Navigate**

Allows you to navigate to agency pages. You need additional rights to view individual agencies.

**Type:** Global

**Agency - View**

Allows you to view a specific agency. This right does not include the Agency - Navigate access right.

**Type:** Instance

**Agency - View Access Rights**

Allows you to view access rights for a specific Agency. This right does not include the Agency - Navigate or the Agency - View access right.

**Type:** Instance

**Agency - View Access Rights - All**

Allows you to view access rights for all agencies. This right does not include the Agency - Navigate or the Agency - View access rights.

**Type:** Global

**Agency - View - All**

Allows you to view all agencies. This right includes the Agency - Navigate access right.

**Type:** Global

**Contract - Baseline Delete**

Allows you to delete baselines for a specific contract. This right requires you to have the Contract - Edit access right.

**Type:** Instance

**Contract - Baseline Delete - All**

Allows you to delete baselines for all contracts. This right requires you to have the Contract - Edit access right.

**Type:** Global

**Contract - Baseline Edit**

Allows you to create and edit the baseline for a specific contract. This right requires you to have the Contract - Edit access right.

**Type:** Instance

**Contract - Baseline Edit - All**

Allows you to create and edit baselines for all contracts. This right requires you to have the Contract - Edit access right.

**Type:** Global

**Contract - Create**

Allows you to create contracts. This right includes the page navigation right.

**Type:** Global

**Contract - Edit**

Allows you to edit a specific contract. This right does not include the Contract - Navigate access right. This right includes the ability to edit and delete CWBS elements, control accounts, SLPPs and work packages for a specific contract.

**Type:** Instance

**Contract - Edit - All**

Allows you to edit all contracts. This right includes the ability to delete contracts and the Contracts - View - All access right. This right includes the ability to edit and delete CWBS elements, control accounts, summary level planning packages (SLPP), and work packages.

**Type:** Global

**Contract - Edit Access Rights**

Allows you to edit access rights for a specific contract. This right does not include the Contract - Navigate or the Contract - View access rights.

**Type:** Instance

**Contract - Edit Access Rights - All**

Allows you to edit access rights for all contracts. This right does not include the Contract - Navigate or the Contract - View access rights.

**Type:** Global

**Contract - Edit only**

Allows you to edit but not delete a specific contract. This right does not include the Contract - Navigate access right. This right includes the ability to edit but not delete CWBS elements, control accounts, SLPPs and work packages for a specific contract.

**Type:** Instance

**Contract - Edit only - All**

Allows you to edit but not delete all contracts. Includes the Contracts - View - All access right. This right includes the ability to edit but not delete CWBS elements, control accounts, SLPPs and work packages.

**Type:** Global

**Contract - Manager (Auto)**

Automatic access right granted to the manager of a specific contract. This right includes the ability to edit and delete CWBS elements, control accounts, SLPPs, and work packages on a specific contract.

**Type:** Instance

**Contract - Navigate**

Allows you to navigate to Contract pages. You need additional access rights to view individual contracts.

**Type:** Global

**Contract - View**

Allows you to view a specific contract. The right does not include the Contract - Navigate access right.

**Type:** Instance

**Contract - View - All**

Allows you to view all contracts. This right includes the Contract - Navigate access right.

**Type:** Global

**Contract - View Access Rights**

Allows you to view access rights for a specific contract. This right does not include the Contract - Navigate or the Contract - View access rights.

**Type:** Instance

**Contract - View Access Rights - All**

Allows you to view access rights for all contracts. This right does not include the Contract - Navigate or the Contract - View access rights.

**Type:** Global

**Control Account - Create**

Allows you to create control accounts. This right includes the ability to create work packages.

**Type:** Global

**Control Account - Edit**

Allows you to edit a specific control account. This right does not include the Control Account - Navigate access right. The right includes the ability to edit and delete work packages on a specific control account.

**Type:** Instance

**Control Account - Edit - All**

Allows you to edit all control accounts. This right includes the Control Account - View - All access right. The right includes the ability to edit and delete all work packages.

**Type:** Global

**Control Account - Edit Access Rights**

Allows you to edit access rights for a specific control account. The right does not include the Control Account - Navigate or Control Account - View access right.

**Type:** Instance

**Control Account - Edit Access Rights - All**

Allows you to edit access rights for all control accounts. This right does not include the Control Account - Navigate or the Control Account - View access rights.

**Type:** Global

**Control Account - Manager (Auto)**

Automatic right granted to the manager of a specific control account. This right includes the ability to create, edit, and delete work packages on a specific control account.

**Type:** Instance

**Control Account - Navigate**

Allows you to navigate to control account pages. You need additional access rights to view individual control accounts.

**Type:** Global

**Control Account - View**

Allows you to view a specific control account. This right does not include the Control Account - Navigate access right. The right includes the ability to view work packages on a specific control account.

**Type:** Instance

**Control Account - View Access Rights**

Allows you to view access rights for a specific control account. This right does not include the Control Account - Navigate or the Control Account - View access rights.

**Type:** Instance

**Control Account - View Access Rights - All**

Allows you to view access rights for all control accounts. This right does not include the Control Account - Navigate or the Control Account - View access right.

**Type:** Global

**Control Account - View - All**

Allows you to view all control accounts. This right includes the Control Account - Navigate access right. This right includes the ability to view all work packages.

**Type:** Global

## Report and Job Access Rights

To manage any EVM report or job, you must have the following access rights. Your CA Clarity PPM administrator can assign access rights at the instance, global, or OBS Unit level.

### **Jobs - Access**

Allows users access to jobs pages. Additional rights such as the Jobs - Run - All right or instance level rights such as the Job - Run right, Job - View Output right, or Job - Edit Properties right are required.

**Type:** Global

### **Job - Edit Properties**

Allows users to view and edit the job properties for specific jobs. This right also lets users reschedule jobs and view output.

**Type:** Global

### **Job - Run**

Allows users to access and run jobs, edit job properties, and view job output.

**Requires:** Jobs - Access right

**Type:** Global

### **Jobs - Run - All**

Allows users to run any job. This right also allows users to schedule of any job, edit of job properties for any job and view the output of any job.

### **Jobs - View Output**

Allows users to view the output of the jobs to which they have access.

**Requires:** Jobs - Access right

**Type:** Global

### **Jobs - View Output - All**

Allows users to view the output of any job.

**Requires:** Jobs - Access right

### **Report - Run**

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

**Requires:** Reports - Access right

**Type:** Instance

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

**Type:** Global

**Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** Reports - Access right

**Reports and Jobs - Administrator Access**

Allows users to view report and job definitions. With this right, users can also view reports and jobs categories.

**Type:** Global

**Reports and Jobs - Create Definition**

Allows users to create, edit, and view report or job definitions.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

**Reports and Jobs - Edit Definition**

Allows users to view and change reports and job definitions.

**Requires:** Reports and Jobs - Administrator right

**Type:** Instance

**Reports and Jobs - Edit Definition - All**

Allows users to edit any report or job definition.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

## NPD Accelerator Access Rights

You require the following access rights to work with NPD Accelerator. The access rights listed in this section pertain only to CA Clarity PPM Accelerator for NPD.

- [Non-Clarity User Group Access Rights](#) (see page 115)
- [Team Member User Group Access Rights](#) (see page 118)
- [Marketing Manager User Group Access Rights](#) (see page 114)
- [Project Portfolio Manager User Group Access Rights](#) (see page 117)
- [Product Portfolio Manager User Group Access Rights](#) (see page 115)
- [Executive User Group Access Rights](#) (see page 112)

### Executive User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

#### Instance Rights

- Page - View
- Process - Start (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

#### Global Rights

- Gate Scoring - View All
- Idea - Hierarchy - Parents - View - All
- Idea - View All
- Ideas - Create
- Portfolio - Navigate

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

**Portlet Pages (Dashboards)**

- Executive Dashboard

## Marketing Manager User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

### Instance Rights

- Page - View
- Process - Cancel (on each [replace with the add-in product name] process)
- Process - Start (on each [replace with the add-in product name] process)
- Process - View Definition (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

### Global Rights

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

### Portlet Pages (Dashboards)

- Idea Management Dashboard

## Non-Clarity User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

### Instance Rights

- Page - View
- Process - Start (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

### Global Rights

- Ideas - Create
- Portlet Viewer - All

### Portlet Pages (Dashboards)

- Idea Management Dashboard: Overview and Idea Vault

## Product Portfolio Manager User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

### Instance Rights

- Page - View
- Portfolio - Create Scenarios (on Product Master)
- Portfolio - Edit (on Product Master)
- Process - Cancel (on each [replace with the add-in product name] process)

- Process - Start (on each [replace with the add-in product name] process)
- Process - View Definition (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

#### **Global Rights**

- Department - View - All
- Gate Scoring - Navigate
- Idea - Hierarchy - Parents - Add - All
- Ideas - Create
- Portfolio - Create
- Portfolio - View - All
- Portlet - Viewer - All
- Product - Benefit Plan - Edit All
- Product - Budget Plan - Edit All
- Product - Cost Plan - Edit All
- Product - Create
- Reports - Access
- Reports - Run All
- Resource - Navigate
- Resource - Soft Book All
- Resource - View - All
- Timesheets - Navigate

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

- Idea Management Dashboard
- Executive Dashboard

## Project Portfolio Manager User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

### Instance Rights

- Page - View
- Portfolio - Create Scenarios (on Project Master)
- Portfolio - Edit (on Project Master)
- Process - Cancel (on each [replace with the add-in product name] process)
- Process - Start (on each [replace with the add-in product name] process)
- Process - View Definition (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

### Global Rights

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

- Reports - Run - All
- Resource - External - Access
- Resource - Navigate
- Resource - Soft Book - All
- Resource - View All
- Timesheets - Navigate

**Portlet Pages (Dashboards)**

- Idea Management Dashboard
- Portfolio Management Dashboard

## Team Member User Group Access Rights

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

The group comprises the following [replace with the add-in product name] access rights:

**Instance Rights**

- Page - View
- Process - Start (on each [replace with the add-in product name] process)
- Project - Risk, Issue, Change Request - View (on the [replace with the add-in product name] template)
- Project - View (on the [replace with the add-in product name] template)
- Project - View Management (on the [replace with the add-in product name] template)

**Global Rights**

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

**Portlet Pages (Dashboards)**

- Idea Management Dashboard: Overview and Idea Vault.

## PMBOK Guide Accelerator Access Rights

The PMBOK Guide Accelerator includes access groups. Each access group includes access rights that allow group members access to secured CA Clarity PPM pages, dashboards, portlets, and documents.

The following access groups are included in the PMBOK Guide Accelerator:

- [PBK Administrator Group](#) (see page 119)
- [PBK Executive Group](#) (see page 152)
- [PBK Project Manager Group](#) (see page 159)
- [PBK Team Member Group](#) (see page 177)

The access rights listed in this section pertain only to PMBOK Guide Accelerator.

### PBK Administrator Group

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

Members of this group are granted the following access rights:

- [PMBOK Guide Accelerator Access Rights for Administrator Group](#) (see page 119)
- [CA Clarity PPM Access Rights for Administrator Group](#) (see page 135)

### PMBOK Guide Accelerator Access Rights for Administrator Group

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

#### **Lessons Learned - Create**

Allows the resource to create lessons learned documents. This includes the page navigation right.

**Type:** Global

#### **Lessons Learned - Edit All**

Allows the resource to edit all lessons learned documents. This includes the page navigation right.

**Type:** Global

#### **Lessons Learned - View All**

Allows resource to view all lessons learned documents. This includes the page navigation right.

**Type:** Global

**Lessons Learned - XOG Access**

Allows the user to import and export lessons learned data using the XML Open Gateway interface.

**Type:** Global

**Product Description - Create**

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

**Type:** Global

**Product Description - Edit All**

Allows the user to edit all product description documents.

**Type:** Global

**Product Description - View All**

Allows the user to view all product description documents.

**Type:** Global

**Product Description - XOG Access**

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

**Type:** Global

**Project - Create - Lessons Learned**

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

**Type:** Instance

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

**Project - Create - Lessons Learned**

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

**Type:** Instance

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

**Project - Create - Product Description**

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

**Type:** Instance

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

**Project - Create - Project Charter**

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

**Type:** Instance

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

**Project - Create - Project Closure**

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

**Type:** Instance

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

**Project - Create - Project Report**

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

**Type:** Instance

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

**Project - Create - Project Scope Statement**

Allows the resource to create project scope statement documents within a specific project.

**Type:** Instance

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

**Project - Create - Quality Management Plan**

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

**Type:** Instance

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

**Project - Create - Risk Identification - SWOT Analysis**

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

**Type:** Instance

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

**Project - Create - Scope Management Plan**

Allows the resource to create scope management plan documents within a specific project.

**Type:** Instance

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

**Project - Edit All - Lessons Learned**

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

**Type:** Instance

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

**Project - Edit All - Product Description**

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

**Type:** Instance

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

**Project - Edit All - Project Charter**

Allows the resource to edit all project charter documents within a specific project.

**Type:** Instance

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

**Project - Edit All - Project Closure**

Allows the resource to edit all project closure documents within a specific project.

**Type:** Instance

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

**Project - Edit All - Project Report**

Allows the resource to edit all project report documents within a specific project.

**Type:** Instance

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

**Project - Edit All - Project Scope Statement**

Allows the resource to edit all project scope statement documents within a specific project.

**Type:** Instance

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

**Project - Edit All - Quality Management Plan**

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

**Type:** Instance

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

**Project - Edit All - Risk Identification - SWOT Analysis**

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

**Type:** Instance

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

**Project - Edit All - Scope Management Plan**

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

**Type:** Instance

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

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - Edit**

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

**Type:** Instance

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

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - Edit All**

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

**Type:** Global

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

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View**

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

**Type:** Instance

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View All**

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

**Type:** Global

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

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - Edit**

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

**Type:** Instance

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

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - Edit All**

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View**

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

**Type:** Instance

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

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View All**

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - Edit**

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

**Type:** Instance

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

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - Edit All**

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View**

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

**Type:** Instance

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

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View All**

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - Edit**

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

**Type:** Instance

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

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - Edit All**

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View**

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

**Type:** Instance

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

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - Edit**

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

**Type:** Instance

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

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - Edit All**

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View**

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

**Type:** Instance

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

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - Edit**

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

**Type:** Instance

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

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - Edit All**

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

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View**

Allows the resource to navigate to a specific project using secured subpage Project scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt).

**Type:** Instance

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

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View All**

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

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - Edit**

Allows the resource to edit a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View**

Allows the resource to navigate to a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - Edit**

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

**Type:** Instance

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

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - Edit All**

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

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View**

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

**Type:** Instance

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

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View All**

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

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - Edit**

Allows the resource to edit a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View**

Allows the resource to navigate to a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project - View All - Lessons Learned**

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

**Type:** Instance

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

**Project - View All - Product Description**

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

**Type:** Instance

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

**Project - View All - Project Charter**

Allows the resource to view all project charter documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Closure**

Allows the resource to view all project closure documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Report**

Allows the resource to view all project report documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Scope Statement**

Allows the resource to view all project scope statement documents within a specific project.

**Type:** Instance

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

**Project - View All - Quality Management Plan**

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

**Type:** Instance

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

**Project - View All - Risk Identification - SWOT Analysis**

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

**Type:** Instance

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

**Project - View All - Scope Management Plan**

Allows the resource to view all scope management plan documents within a specific project.

**Type:** Instance

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

**Project Charter - Create**

Allows the resource to create project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - Edit All**

Allows the resource to edit all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - View All**

Allows resource to view all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - XOG Access**

Allows the user to import and export project charter documents using the XML Open Gateway interface.

**Type:** Global

**Project Closure - Create**

Allows the resource to create project closure documents. This includes the page navigation right.

**Type:** Global

**Project Closure - Edit All**

Allows the resource to edit all project closure documents.

**Type:** Global

**Project Closure - View All**

Allows resource to view all project closure documents. This includes the page navigation right.

**Type:** Global

**Project Closure - XOG Access**

Allows the user to import and export project closure documents using the XML Open Gateway interface.

**Type:** Global

**Project Conversion – Create**

Allows the resource to create project conversion objects. This includes the page navigation right.

**Type:** Global

**Project Conversion – Edit All**

Allows the resource to edit all project conversion objects. This includes the page navigation right.

**Type:** Global

**Project Conversion – Navigate**

Allows the resource to navigate to project conversion pages.

**Type:** Global

**Project Conversion – Subpage General (ID: pbk\_prjconvertProperties) - Edit All**

Allows the resource to edit all project conversion objects using secured subpage General (ID: pbk\_prjconvertProperties).

**Type:** Global

**Project Conversion – Subpage General (ID: pbk\_prjconvertProperties) - View All**

Allows the resource to view all project conversion objects using secured subpage General (ID: pbk\_prjconvertProperties).

**Type:** Global

**Project Conversion – View All**

Allows the resource to view all project conversion objects. This includes the page navigation right.

**Type:** Global

**Project Conversion - XOG Access**

Allows the resource to import and export project conversion instances using the XML Open Gateway interface.

**Type:** Global

**Project Report - Create**

Allows the resource to create project reports. This includes the page navigation right.

**Type:** Global

**Project Report - Edit All**

Allows the resource to edit all project report documents.

**Type:** Global

**Project Report - View All**

Allows the user to view all project report documents.

**Type:** Global

**Project Report - XOG Access**

Allows the user to import and export project reports using the XML Open Gateway interface.

**Type:** Global

**Project Scope Statement - Create**

Allows the resource to create project scope statements. This includes the page navigation right.

**Type:** Global

**Project Scope Statement - Edit All**

Allows the resource to edit all project scope statements. This includes the page navigation right.

**Type:** Global

**Project Scope Statement - View All**

Allows the user to view all project scope statement documents.

**Type:** Global

**Project Scope Statement - XOG Access**

Allows the user to import and export project scope statements using the XML Open Gateway interface.

**Type:** Global

**Quality Management Plan - Create**

Allows the resource to create quality management plan documents. This includes the page navigation right.

**Type:** Global

**Quality Management Plan - Edit All**

Allows the resource to edit all quality management plan documents. This includes the page navigation right.

**Type:** Global

**Quality Management Plan - View All**

Allows the user to view all quality management plan documents.

**Type:** Global

**Quality Management Plan - XOG Access**

Allows the user to import and export quality management plan documents using the XML Open Gateway interface.

**Type:** Global

**Risk Identification - SWOT Analysis - Create**

Allows the resource to create risk identification - SWOT analysis documents. This includes the page navigation right.

**Type:** Global

**Risk Identification - SWOT Analysis - Edit All**

Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.

**Type:** Global

**Risk Identification - SWOT Analysis - View All**

Allows the user to view all risk identification - SWOT analysis documents.

**Type:** Global

**Risk Identification - SWOT Analysis - XOG Access**

Allows the user to import and export risk identification - SWOT analysis documents using the XML Open Gateway interface.

**Type:** Global

**Scope Management Plan - Create**

Allows the resource to create scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - Edit All**

Allows the user to edit all scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - View All**

Allows resource to view all scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - XOG Access**

Allows the user to import and export scope management plan documents using the XML Open Gateway interface.

**Type:** Global

## CA Clarity PPM Access Rights for Administrator Group

The following CA Clarity PPM access rights are included with this access group:

**Administration - Access**

Allows the user to access the Administration menu.

**Type:** Global

**Audit Trail - View - All**

Allows users to view any audit page.

**Type:** Global

**Custom Objects Editor**

Allows users to edit the definition of a custom object.

**Type:** Global

**Jobs - Access**

Allows users access to jobs pages. Additional rights such as the Jobs - Run - All right or instance level rights such as the Job - Run right, Job - View Output right, or Job - Edit Properties right are required.

**Type:** Global

**Jobs - Run - All**

Allows users to run any job. This right also allows users to schedule of any job, edit of job properties for any job and view the output of any job.

**Jobs - View Output - All**

Allows users to view the output of any job.

**Requires:** Jobs - Access right

**Knowledge Store - View All**

Allows resources to view all documents in the knowledge store.

**Type:** Global

**Menu Definition Editor - All**

Allows a user to edit and view the definitions of all menu items for the Navigator or Administration menu.

**Type:** Global

**Object - Create Definition**

Allows a user to create a custom object.

**Type:** Global

**Object Administration**

Allows a user to administer all custom objects.

**Type:** Global

**Object Mapping - XOG Access**

Allows the resource to import and export object mapping instances using the XML Open Gateway interface.

**Type:** Global

**Page Definition Editor**

Allows users to edit, view, and delete the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

**Page Definition Editor - All**

Allows users to edit, view, and delete the definition of all pages.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Global

**Page Definition Viewer**

Allows the user to view the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Pages:** Executive Dashboard, Lessons Learned, Project Charters, Project Report, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, and Risks

**Portlet Definition Editor**

Allows the user to edit and view the definition of a specific portlet.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Instance

**Portlet Instances:** Project Conversion Audit Trail, Project Conversion List, Project Conversion Processes, Project Conversion Properties, Project Conversion Tabs, Project Conversion Contents, Project Checklist, Project Change Requests, Project Status, Project Issues, Lessons Learned, PMO Dashboard, Project Document Review Status, Projects by Phases, Project by Variance and Performance, Project Charter, Project Reports, Project Status, Projects Variance and Performance, and Project Risks

**Portlet Definition Editor - All**

Allows a user to edit and view the definitions of all portlets available from Studio.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Portlet Instances:** Project Conversion Audit Trail, Project Conversion List, Project Conversion Processes, Project Conversion Properties, Project Conversion Tabs, Project Conversion Contents, Project Checklist, Project Change Requests, Project Status, Project Issues, Lessons Learned, PMO Dashboard, Project Document Review Status, Projects by Phases, Project by Variance and Performance, Project Charter, Project Reports, Project Status, Projects Variance and Performance, and Project Risks

**Process - Cancel**

Allows users to cancel process instances from a specific process definition.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Cancel - All**

Allows users to cancel of all process instances.

**Type:** Global

**Process - Create Definition**

Allows users or OBS unit to create or change processes for any object type to which they have access. Users with this right can modify, copy, or start any process they create. Users can create processes from the *Processes* page of an object or from the Data Administration, Processes menu.

**Type:** Instance

**Process - Delete**

Allows users to delete process instances from a specific process definition.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Delete - All**

Allows users to delete a process instance from any process definition.

**Type:** Global

**Process - Edit Definition**

Allows users to edit a specific process definition, but cannot start any process instances.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Edit Definition - All**

Allows users to edit all process definitions. Typically, this right is given to administrators and senior executives. Users with this right cannot start processes.

**Type:** Global

**Process - Manage**

Allows users to start automatically a process instance for the process definition to which they have access. Users can also start a new process instance, delete a process instance, or cancel a process instance.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Manage - All**

Allows users to start automatically any process. This right is typically given to administrators and senior executives. Users with this right can change processes they create and start processes for objects to which they have access. This access right also allows users to start a new process instance, delete a process instance, or cancel a process instance.

**Type:** Global

**Process - Start**

Allows users to start a new process instance from a specific process definition.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Start - All**

Allows users to start (that is, initiate) of all process instances.

**Type:** Global

**Process - View Definition**

Allows users or an OBS unit to view the process definition from the objects to which they have access. Users with this right cannot start processes.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - View Definition - All**

Allows users to view all process definitions. Typically, this right is administrators and senior executives. Users with this right cannot start processes.

**Type:** Global

**Process View Instance - All**

Allows users to view all process instances.

**Type:** Global

**Project - Approve**

Allows users to approve a specific project.

**Includes:** *Project - Edit* right to edit the project.

**Type:** Instance

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

**Project - Approve - All**

Allows users to approve all projects.

**Includes:** *Project - Edit - All* right to edit all projects.

**Type:** Global

**Project - Attach Requisition Entry Resources**

Allows a resource to attach resources to requisition entries. Only users with this access right can change project statuses to "Proposed" and "Booked". This right includes the *Project – View Requisitions* access right, and the right to navigate to the requisition pages.

**Type:** Instance

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

**Project - Benefit Plan - Edit**

Allows the resource to edit the benefit plans of a specific project.

**Type:** Instance

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

**Project - Benefit Plan - View**

Allows the resource to view the benefit plans of a specific project.

**Type:** Instance

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

**Project - Billing Access**

Allows a resource to access a specific billing project.

**Type:** Instance

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

**Project - Billing Approval**

Allows the resource to approve a specific billing project.

**Type:** Instance

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

**Project - Budget Plan - Approve**

Allows the resource to approve the budget plans for a specific project.

**Type:** Instance

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

**Project - Budget Plan - Edit**

Allows the resource to view the budget plans for a specific project.

**Type:** Instance

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

**Project - Budget Plan - View**

Allows the resource to view the budget plans for a specific project.

**Type:** Instance

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

**Project - Budget Plan - View All**

Allows the resource to view all project budget plans.

**Type:** Global

**Project - Cost Plan - Edit**

Allows the resource to edit the cost plans for a specific project.

**Type:** Instance

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

**Project - Cost Plan - Edit All**

Allows the resource to edit cost plans for all projects.

**Type:** Global

**Project - Cost Plan - View**

Allows the resource to view the cost plans for a specific project.

**Type:** Instance

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

**Project - Cost Plan - View All**

Allows the resource to view cost plans for all projects.

**Type:** Global

**Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Create/Edit Requisitions**

Allows the resource to create and edit requisition properties. This right includes the right to navigate to the requisition pages, but not to create or edit the entries within the requisitions.

**Type:** Instance

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

**Project - Delete**

Allows users to delete a specific project.

**Requires:** *Project - View* to view the project.

**Type:** Instance

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

**Project - Delete - All**

Allows users to delete any project.

**Requires:** *Project - View* to view the project.

**Type:** Global

**Project - Edit**

Allows the user to edit all parts of a project.

**Type:** Instance

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

**Project - Edit Access Rights**

Allows users to manage access rights for all projects.

**Requires:** *Project - Edit Management* right to manage access rights for all projects.

**Type:** Global

**Project - Edit Assigned Releases**

Allows the resource to edit assigned releases for a specific project.

**Type:** Instance

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

**Project - Edit Assigned Tasks**

Allows the user to edit assigned tasks on a specific project.

**Type:** Instance

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

**Project - Edit Assigned Tasks - All**

Allows the user to edit assigned tasks on all projects.

**Type:** Global

**Project - Edit Chargebacks Information**

Allows the resource to edit chargeback rules for a specific project.

**Type:** Instance

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

**Project - Edit Chargebacks Information All**

Allows the resource to edit chargeback rules for all projects.

**Type:** Global

**Project - Enable Financial**

Enable financial properties for Projects.

**Requires:**

- *Project - View*
- *Project - View Management or Project - Manager*

**Type:** Global

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

**Project - Edit Financial - All**

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

**Type:** Global

**Project - Edit Management**

Allows users to edit general and management properties, to add staff, create tasks, and create and manage processes for the specific project. This right includes the ability to add subprojects and to edit the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

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

**Project - Edit Management - All**

Allows the user to edit general and management properties for all projects. This right allows you to add staff and create tasks if projects are enabled for management. This right also includes the right to add subprojects to the project and edit the project in a project scheduler, such as Microsoft Project.

**Type:** Global

**Project - Edit Project Plan**

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

**Type:** Instance

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

**Project - Financial Plan - Submit for Approval**

Allows users to submit the financial plans for approval for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Financial Rollup - Add**

Allows the resource to add investments to the financial rollup hierarchy for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Financial Rollup - Edit**

Allows the resource to edit the financial rollup hierarchy for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Financial Rollup - View**

Allows the resource to view the financial rollup for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Financial Rollup - View - All**

Allows the resource to view the financial rollup for all projects.

**Type:** Global

**Project - Hierarchy - Parents - Add**

Allows the resource to add investments to the parent hierarchy for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Parents - Edit**

Allows the resource to edit investments in the parent hierarchy for a specific project.

**Type:** Instance

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

**Project - Modify Baseline**

Allows users to edit the baseline for a specific project. This right also allows users to edit the project general properties and processes.

**Type:** Instance

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

**Project - Reverse Charges**

Allows the resource to reverse charges for a specific project.

**Type:** Instance

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

**Project - Reverse Charges - All**

Allows the user to reverse charges for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - Delete - All**

Allows you to delete risks, issues, and change requests for all projects.

**Type:** Global

**Project - Risk, Issue, Change Request - Create/Edit**

Allows users to create and edit risks, issues, and changes for a specific project.

**Type:** Instance

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

**Project - Risk, Issue, Change Request - Delete**

Allows users to delete risks, issues, and changes for a specific project on which they are a staff member.

**Type:** Instance

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

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and change requests for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - View**

Allows users to view all risks, issues, and change requests for a specific project.

**Type:** Global

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

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

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

**Project - View Access Rights**

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the *Project - View* access right to the project. From Administration, users must also have the *Resource - Edit Administration* right.

**Type:** Instance

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

**Project - View All Fields**

Allows users to view all the general properties and custom defined fields for a specific project.

**Type:** Instance

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

**Project - View Assigned Releases**

Allows the resource to view assigned releases for a specific project.

**Type:** Instance

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

**Project - View Chargebacks Information**

Allows the resource to view chargeback rules for a specific project.

**Type:** Instance

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

**Project - View Chargebacks Information All**

Allows the resource to view chargeback rules for all projects.

**Type:** Global

**Project - View Documents**

Allows user to view documents or folders even if user is not a project participant, as long as the documents or folders are marked open to non-participants. This right includes the *Project - View Base* access right.

**Type:** Instance

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

**Project - View Financial**

Allows users to view the general and financial properties for a specific project.

**Type:** Instance

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

**Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the *Project - Budget Plan - View All* access right.

**Type:** Global

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

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

**Project - View Management - All**

Allows users to view management properties and processes on any project that has been enabled for management.

**Type:** Global

**Project - View Requisitions**

Allows the user to view requisitions and the requisition resources.

**Type:** Global

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

**Project - View Tasks**

Allows users to view all tasks for a specific project. This access right is dependent on the resource having the *Project - View Base* access right.

**Type:** Instance

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

**Project - View Tasks - All**

Allows users to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

**Reports - Access**

Allows users to access reports pages 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

**Report - Run**

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

**Requires:** Reports - Access right

**Type:** Instance

**Report Instances:** Project Report and Project Status Snapshot

**Reports - Run - All**

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

**Type:** Global

**Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** Reports - Access right

**Type:** Global

**Reports and Jobs - Administrator Access**

Allows users to view report and job definitions. With this right, users can also view reports and jobs categories.

**Type:** Global

**Reports and Jobs - Create Definition**

Allows users to create, edit, and view report or job definitions.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

**Reports and Jobs - Edit Definition**

Allows users to view and change reports and job definitions.

**Requires:** Reports and Jobs - Administrator right

**Type:** Instance

**Report Instances:** Project Report and Project Status Snapshot

**Reports and Jobs - Edit Definition - All**

Allows users to edit any report or job definition.

**Requires:** Report and Jobs - Administrator Access right

**Type:** Global

**Resource - Edit - All**

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

**Timesheets - Approve All**

Allows users to approve all submitted timesheets.

**Type:** Global

**Timesheets - Edit All**

Allows users to edit all timesheets.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

## PBK Executive Group

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

Members of this group are granted the following access rights:

- [PMBOK Guide Accelerator Access Rights for Executive Group](#) (see page 152)
- [CA Clarity PPM Access Rights for Executive Group](#) (see page 156)

## PMBOK Guide Accelerator Access Rights for Executive Group

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

### **Lessons Learned - Edit All**

Allows the resource to edit all lessons learned documents. This includes the page navigation right.

**Type:** Global

### **Lessons Learned - View All**

Allows resource to view all lessons learned documents. This includes the page navigation right.

**Type:** Global

### **Product Description - Edit All**

Allows the user to edit all product description documents.

**Type:** Global

### **Product Description - View All**

Allows the user to view all product description documents.

**Type:** Global

### **Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - Edit All**

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

**Type:** Global

### **Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View All**

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

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - Edit All**

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View All**

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - Edit All**

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View All**

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - Edit All**

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - Edit All**

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - Edit All**

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

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View All**

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

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - Edit All**

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

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View All**

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

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project Charter - Edit All**

Allows the resource to edit all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - View All**

Allows resource to view all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Closure - Edit All**

Allows the resource to edit all project closure documents.

**Type:** Global

**Project Closure - View All**

Allows resource to view all project closure documents. This includes the page navigation right.

**Type:** Global

**Project Report - Edit All**

Allows the resource to edit all project report documents.

**Type:** Global

**Project Report - View All**

Allows the user to view all project report documents.

**Type:** Global

**Project Scope Statement - Edit All**

Allows the resource to edit all project scope statements. This includes the page navigation right.

**Type:** Global

**Project Scope Statement - View All**

Allows the user to view all project scope statement documents.

**Type:** Global

**Quality Management Plan - Edit All**

Allows the resource to edit all quality management plan documents. This includes the page navigation right.

**Type:** Global

**Quality Management Plan - View All**

Allows the user to view all quality management plan documents.

**Type:** Global

**Risk Identification - SWOT Analysis - Edit All**

Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.

**Type:** Global

**Risk Identification - SWOT Analysis - View All**

Allows the user to view all risk identification - SWOT analysis documents.

**Type:** Global

**Scope Management Plan - Edit All**

Allows the user to edit all scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - View All**

Allows resource to view all scope management plan documents. This includes the page navigation right.

**Type:** Global

## CA Clarity PPM Access Rights for Executive Group

The following CA Clarity PPM access rights are included with this access group:

**Knowledge Store - View All**

Allows resources to view all documents in the knowledge store.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Pages:** Executive Dashboard, Lessons Learned, Project Charters, Project Report, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, and Risks

**Page Viewer - All**

Lets the user view any configured portlet page. Before the users can view them, link the portlet pages to a menu. The user requires the rights to navigate the menu. For example, if a page links to the Administration menu, the users require the *Administration - Access* right.

**Type:** Global

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

Portlet Instances: Project Checklist, Project Change Requests, Project Status, Project Issues, Lessons Learned, PMO Dashboard, Project Document Review Status, Projects by Phases, Project by Variance and Performance, Project Charter, Project Reports, Project Status, Projects Variance and Performance, and Project Risks

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Project - Approve - All**

Allows users to approve all projects.

Includes: Project - Edit - All right to edit all projects.

**Type:** Global

**Project - Budget Plan - View All**

Allows users to view budget plans for all projects.

**Type:** Global

**Project - Cost Plan - View All**

Allows users to view cost plans for all projects.

**Type:** Global

**Project - Hierarchy - Financial Rollup - View - All**

Allows the resource to view the financial rollup for all projects.

**Type:** Global

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the Project - Budget Plan - View All access right.

**Type:** Global

**Project - View Tasks - All**

Allows the user to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

**Project - View Management - All**

Allows users to view management properties and processes on any project that has been enabled for management.

**Type:** Global

**Reports - Access**

Allows users to access reports pages 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

**Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** Reports - Access right

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

## PBK Project Manager Group

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

Members of this group are granted the following access rights:

- [PMBOK Guide Accelerator Access Rights for Project Manager Group](#) (see page 159)
- [CA Clarity PPM Access Rights for Project Manager Group](#) (see page 169)

## PMBOK Guide Accelerator Access Rights for Project Manager Group

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

**Lessons Learned - Create**

Allows the resource to create lessons learned documents. This includes the page navigation right.

**Type:** Global

**Lessons Learned - Edit All**

Allows the resource to edit all lessons learned documents. This includes the page navigation right.

**Type:** Global

**Lessons Learned - View All**

Allows resource to view all lessons learned documents. This includes the page navigation right.

**Type:** Global

**Lessons Learned - XOG Access**

Allows the user to import and export lessons learned data using the XML Open Gateway interface.

**Type:** Global

**Product Description - Create**

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

**Type:** Global

**Product Description - Edit All**

Allows the user to edit all product description documents.

**Type:** Global

**Product Description - View All**

Allows the user to view all product description documents.

**Type:** Global

**Product Description - XOG Access**

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

**Type:** Global

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - Edit All**

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

**Type:** Global

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View**

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

**Type:** Instance

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

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View All**

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

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - Edit All**

Allows the user to edit all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View**

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

**Type:** Instance

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

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View All**

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - Edit All**

Allows the user to edit all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View**

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

**Type:** Instance

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

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View All**

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - Edit All**

Allows the user to edit all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View**

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

**Type:** Instance

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

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - Edit All**

Allows the user to edit all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View**

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

**Type:** Instance

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

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - Edit All**

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

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View**

Allows the resource to navigate to a specific project using secured subpage Project scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt).

**Type:** Instance

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

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View All**

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

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View**

Allows the resource to navigate to a specific project using secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - Edit All**

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

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View**

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

**Type:** Instance

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

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View All**

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

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - Edit All**

Allows the user to edit all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View**

Allows the resource to navigate to a specific project using secured subpage scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Instance

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

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project - View All - Lessons Learned**

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

**Type:** Instance

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

**Project - View All - Product Description**

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

**Type:** Instance

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

**Project - View All - Project Charter**

Allows the resource to view all project charter documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Closure**

Allows the resource to view all project closure documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Report**

Allows the resource to view all project report documents within a specific project.

**Type:** Instance

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

**Project - View All - Project Scope Statement**

Allows the resource to view all project scope statement documents within a specific project.

**Type:** Instance

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

**Project - View All - Quality Management Plan**

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

**Type:** Instance

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

**Project - View All - Risk Identification - SWOT Analysis**

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

**Type:** Instance

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

**Project - View All - Scope Management Plan**

Allows the resource to view all scope management plan documents within a specific project.

**Type:** Instance

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

**Project Charter - Create**

Allows the resource to create project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - Edit All**

Allows the resource to edit all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - View All**

Allows resource to view all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Charter - XOG Access**

Allows the user to import and export project charter documents using the XML Open Gateway interface.

**Type:** Global

**Project Closure - Create**

Allows the resource to create project closure documents. This includes the page navigation right.

**Type:** Global

**Project Closure - Edit All**

Allows the resource to edit all project closure documents.

**Type:** Global

**Project Closure - View All**

Allows resource to view all project closure documents. This includes the page navigation right.

**Type:** Global

**Project Closure - XOG Access**

Allows the user to import and export project closure documents using the XML Open Gateway interface.

**Type:** Global

**Project Report - Create**

Allows the resource to create project reports. This includes the page navigation right.

**Type:** Global

**Project Report - Edit All**

Allows the resource to edit all project report documents.

**Type:** Global

**Project Report - View All**

Allows the user to view all project report documents.

**Type:** Global

**Project Report - XOG Access**

Allows the user to import and export project reports using the XML Open Gateway interface.

**Type:** Global

**Project Scope Statement - Create**

Allows the resource to create project scope statements. This includes the page navigation right.

**Type:** Global

**Project Scope Statement - Edit All**

Allows the resource to edit all project scope statements. This includes the page navigation right.

**Type:** Global

**Project Scope Statement - View All**

Allows the user to view all project scope statement documents.

**Type:** Global

**Project Scope Statement - XOG Access**

Allows the user to import and export project scope statements using the XML Open Gateway interface.

**Type:** Global

**Quality Management Plan - Create**

Allows the resource to create quality management plan documents. This includes the page navigation right.

**Type:** Global

**Quality Management Plan - Edit All**

Allows the resource to edit all quality management plan documents. This includes the page navigation right.

**Type:** Global

**Quality Management Plan - View All**

Allows the user to view all quality management plan documents.

**Type:** Global

**Quality Management Plan - XOG Access**

Allows the user to import and export quality management plan documents using the XML Open Gateway interface.

**Type:** Global

**Risk Identification - SWOT Analysis - Create**

Allows the resource to create risk identification - SWOT analysis documents. This includes the page navigation right.

**Type:** Global

**Risk Identification - SWOT Analysis - Edit All**

Allows the resource to edit all risk identification - SWOT analysis documents. This includes the page navigation right.

**Type:** Global

**Risk Identification - SWOT Analysis - View All**

Allows the user to view all risk identification - SWOT analysis documents.

**Type:** Global

**Risk Identification - SWOT Analysis - XOG Access**

Allows the user to import and export risk identification - SWOT analysis documents using the XML Open Gateway interface.

**Type:** Global

**Scope Management Plan - Create**

Allows the resource to create scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - Edit All**

Allows the user to edit all scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - View All**

Allows resource to view all scope management plan documents. This includes the page navigation right.

**Type:** Global

**Scope Management Plan - XOG Access**

Allows the user to import and export scope management plan documents using the XML Open Gateway interface.

**Type:** Global

## CA Clarity PPM Access Rights for Project Manager Group

The following CA Clarity PPM access rights are included with this access group:

**Page Definition Editor**

Allows users to edit, view, and delete the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

**Page Definition Viewer**

Allows the user to view the definition of a specific page.

**Required:** *Administration - Studio* access right to access the CA Clarity Studio menu.

**Type:** Instance

**Page Instances:** Executive Dashboard, Lessons Learned, Project Charters, Reports, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, Risks, and Dashboard

### **Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Pages:** Executive Dashboard, Lessons Learned, Project Charters, Project Report, Risks, Issues and Change Requests, PMBOK® Guide Layout, Change Requests, Issues, Projects by Phases, Projects Status, Project Variance and Performance, and Risks

### **Portlet Definition Editor**

Allows the user to edit and view the definition of a specific portlet.

**Requires:** *Administration - Studio* to access the Studio menu.

**Type:** Instance

**Portlet Instances:** Project Conversion Contents, Project Checklist, Project Change Requests, Project Status, Project Issues, Lessons Learned, PMO Dashboard, Project Document Review Status, Projects by Phases, Project by Variance and Performance, Project Charter, Project Reports, Project Status, Projects Variance and Performance, and Project Risks

### **Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

### **Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Portlet Instances:** Project Conversion Audit Trail, Project Conversion List, Project Conversion Processes, Project Conversion Properties, Project Conversion Tabs, Project Conversion Contents, Project Checklist, Project Change Requests, Project Status, Project Issues, Lessons Learned, PMO Dashboard, Project Document Review Status, Projects by Phases, Project by Variance and Performance, Project Charter, Project Reports, Project Status, Projects Variance and Performance, and Project Risks

### **Process - Cancel**

Allows users to cancel process instances from a specific process definition.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - Start**

Allows users to start a new process instance from a specific process definition.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Process - View Definition**

Allows users or an OBS unit to view the process definition from the objects to which they have access. Users with this right cannot start processes.

**Type:** Instance

**Process Instances:** Change Request Review, Lessons Learned Review, Project Conversion, Product Description Approval, Project Charter Approval, Project Closure Review, Project Report Review, and Project Scope Statement Review

**Project - Benefit Plan - View**

Allows users to view the benefit plans for a specific project.

**Type:** Instance

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

**Project - Budget Plan - View**

Allows users to view the budget plans for a specific project.

**Type:** Instance

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

**Project - Cost Plan - Edit All**

Allows users to edit cost plans for all projects.

**Type:** Global

**Project - Cost Plan - View**

Allows users to view the cost plans for a specific project.

**Type:** Instance

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

**Project - Cost Plan - View All**

Allows users to view cost plans for all projects.

**Type:** Global

**Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Edit Chargebacks Information All**

Allows the resource to edit chargeback rules for all projects.

**Type:** Global

**Project - Edit Financial - All**

Allows users to view and edit the general properties, processes, and financial information about all projects. This right also allows the user to enable financial projects.

**Type:** Global

**Project - Hierarchy - Financial Rollup - View**

Allows the resource to view the financial rollup for a specific project.

**Type:** Instance

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

**Project - Hierarchy - Financial Rollup - View - All**

Allows the resource to view the financial rollup for all projects.

**Type:** Global

**Project - Reverse Charges - All**

Allows the user to reverse charges for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and change requests for any project.

**Type:** Global

**Project - Risk, Issue, Change Request - View**

Allows the resource to view risks, issues, and changes for a specific project.

**Type:** Instance

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

**Project - Risk, Issue, Change Request - View - All**

Allows the resource to view all risks, issues, and change requests for a project instance.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

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

**Project - View Access Rights**

Allows users to view access rights for a specific project. From CA Clarity PPM, this right implies that users also have the *Project - View* access right to the project. From Administration, users must also have the *Resource - Edit Administration* right.

**Type:** Instance

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

**Project - View All Fields**

Allows users to view all the general properties and custom defined fields for a specific project.

**Type:** Instance

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

**Project - View Assigned Releases**

Allows the resource to view assigned releases for a specific project.

**Type:** Instance

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

**Project - View Chargebacks Information**

Allows the resource to view chargeback rules for a specific project.

**Type:** Instance

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

**Project - View Chargebacks Information All**

Allows the resource to view chargeback rules for all projects.

**Type:** Global

**Project - View Documents**

Allows user to view documents or folders even if user is not a project participant, as long as the documents or folders are marked open to non-participants. This right includes the *Project - View Base* access right.

**Type:** Instance

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

**Project - View Financial**

Allows the resource to view the general and financial properties for a specific project.

**Type:** Instance

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

**Project - View Financial - All**

Allows users to view the general and financial properties, and processes on all projects. This right does not include the *Project - Budget Plan - View All* access right.

**Type:** Global

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

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

**Project - View Requisitions**

Allows the user to view requisitions and the requisition resources.

**Type:** Global

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

**Project - View Tasks**

Allows users to view all tasks for a specific project. This access right is dependent on the resource having the *Project - View Base* access right.

**Type:** Instance

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

**Reports - Access**

Allows users to access reports pages 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

**Report - Run**

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

**Requires:** Reports - Access right

**Type:** Instance

**Report Instances:** Project Report and Project Status Snapshot

**Reports - Run - All**

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

**Type:** Global

**Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** Reports - Access right

**Type:** Global

**Resource - Hard Book - All**

Allows users to soft and hard book all resources for investments to which they have view or edit rights.

**Type:** Global

**Resource - Edit - All**

Allows users to view and edit general information, contact information, financial information, skills, and calendar for all resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

**Timesheets - Approve All**

Allows users to approve all submitted timesheets.

**Type:** Global

**Timesheets - Edit All**

Allows users to edit all timesheets.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

## PBK Team Member Group

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

Members of this group are granted the following access rights:

- [PMBOK Guide Accelerator Access Rights for Team Member Group](#) (see page 177)
- [CA Clarity PPM Access Rights for Team Member Group](#) (see page 180)

## PMBOK Guide Accelerator Access Rights for Team Member Group

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

**Lessons Learned - View All**

Allows resource to view all lessons learned documents. This includes the page navigation right.

**Type:** Global

**Product Description - View All**

Allows the user to view all product description documents.

**Type:** Global

**Project - Subpage Lessons Learned (ID: projectCreate.subObjList.pbk\_lessons) - View All**

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

**Type:** Global

**Project - Subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc) - View All**

Allows the user to view all projects using the secured subpage Product Description (ID: projectCreate.subObjList.pbk\_prd\_desc).

**Type:** Global

**Project - Subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter) - View All**

Allows the user to view all projects using the secured subpage Project Charter (ID: projectCreate.subObjList.pbk\_prj\_charter).

**Type:** Global

**Project - Subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr) - View All**

Allows the user to view all projects using the secured subpage Project Closure (ID: projectCreate.subObjList.pbk\_prj\_clsr).

**Type:** Global

**Project - Subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt) - View All**

Allows the user to view all projects using the secured subpage Project Report (ID: projectCreate.subObjList.pbk\_prj\_rpt).

**Type:** Global

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk\_scp\_stmt) - View All**

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

**Type:** Global

**Project - Subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Quality Management Plan (ID: projectCreate.subObjList.pbk\_qlt\_mgmt\_plan).

**Type:** Global

**Project - Subpage Risk Identification - SWOT Analysis (ID: projectCreate.subObjList.pbk\_rsk\_id) - View All**

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

**Type:** Global

**Project - Subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan) - View All**

Allows the user to view all projects using the secured subpage Scope Management Plan (ID: projectCreate.subObjList.pbk\_scp\_mgmt\_plan).

**Type:** Global

**Project Charter - View All**

Allows resource to view all project charter documents. This includes the page navigation right.

**Type:** Global

**Project Closure - View All**

Allows resource to view all project closure documents. This includes the page navigation right.

**Type:** Global

**Project Report - View All**

Allows the user to view all project report documents.

**Type:** Global

**Project Scope Statement - View All**

Allows the user to view all project scope statement documents.

**Type:** Global

**Quality Management Plan - View All**

Allows the user to view all quality management plan documents.

**Type:** Global

**Risk Identification - SWOT Analysis - View All**

Allows the user to view all risk identification - SWOT analysis documents.

**Type:** Global

**Scope Management Plan - View All**

Allows resource to view all scope management plan documents. This includes the page navigation right.

**Type:** Global

## CA Clarity PPM Access Rights for Team Member Group

### **Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Page Instances:** Dashboard

### **Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Portlet Instances:** Project Checklist, Project Status, PMO Dashboard, and Project Document Review Status

### **Project - View Tasks - All**

Allows users to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

### **Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** Reports - Access right

**Type:** Global

### **Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

## PMO Accelerator Access Groups

The PMO Accelerator includes access groups. Each group has global and instance level access rights associated to it. When you add resources to these groups as members, the resources automatically inherit the rights of the group. The groups are meant to be implemented in a matrix fashion, which means that a resource will probably be associated to more than one group in order to obtain all the rights the resource should have.

Access rights for the Lookup Mapping object are only assigned to the PMO System Administrator group. When necessary, your CA Clarity PPM administrator can add these rights to another group.

The following access groups are included with the PMO Accelerator add-in:

- [PMO Executive Viewer](#) (see page 182)
- [PMO Executive Viewer Extended](#) (see page 184)
- [PMO Financial Administrator](#) (see page 188)
- [PMO Idea Creator](#) (see page 189)
- [PMO Idea Reviewer](#) (see page 190)
- [PMO Investment Creator](#) (see page 191)
- [PMO Investment Viewer Extended](#) (see page 192)
- [PMO Portfolio Manager](#) (see page 196)
- [PMO Program Manager](#) (see page 197)
- [PMO Project Creator](#) (see page 199)
- [PMO Project Manager](#) (see page 200)
- [PMO Project Manager Extended](#) (see page 202)
- [PMO Project Viewer](#) (see page 206)
- [PMO Resource Administrator](#) (see page 207)
- [PMO Resource Manager](#) (see page 208)
- [PMO Resource Manager Extended](#) (see page 210)
- [PMO System Administrator](#) (see page 212)
- [PMO Team Member](#) (see page 212)
- [PMO Timesheet Administrator](#) (see page 213)
- [PMO Vendor Management](#) (see page 213)

## PMO Executive Viewer

Members of the PMO Executive Viewer group view all project properties, status reports, schedules, and resource allocations; run project and resource capacity reports.

The following are the access rights included with this group.

| Type                   | Area                                                                             | Access Right                                                                                                                                                               |
|------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                 | General                                                                          | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                      |
|                        | Project Management                                                               | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All<br>Project - Risk, Issue, Change Request - View - All<br>Status Report - View All |
|                        | Resource Management                                                              | Resource - View - All                                                                                                                                                      |
| Instance (Page - View) | Resource Planning Page and Tabs                                                  | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations                                            |
|                        | Status Report Review Page and Tabs                                               | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                           |
|                        | Timesheet Overview Page                                                          | Timesheet Overview<br>Timesheet Details<br>Timesheet Notes                                                                                                                 |
|                        | Timesheet Review Page and Tab<br><b>Note:</b> This page is a team object action. | Timesheet Review<br>Timesheets<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page.               |
|                        | PMO-Project Storyboard Page                                                      | Issue Drill Down                                                                                                                                                           |

| Type                      | Area                               | Access Right                                                                                                                                 |
|---------------------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Instance (Portlet - View) | Resource Planning Page Portlets    | Role Capacity Histogram                                                                                                                      |
|                           |                                    | Role Capacity                                                                                                                                |
|                           |                                    | OBS Resource Aggregation                                                                                                                     |
|                           |                                    | OBS Investment Aggregation                                                                                                                   |
|                           |                                    | Top Down Planning by Investment                                                                                                              |
|                           |                                    | Resource Workloads                                                                                                                           |
|                           |                                    | Weekly Detail                                                                                                                                |
|                           |                                    | Allocation Discrepancy                                                                                                                       |
|                           |                                    | Unfilled Requirements                                                                                                                        |
|                           | Status Report Review Page Portlets | Status Report Review Filter                                                                                                                  |
|                           |                                    | Status Report Listing                                                                                                                        |
|                           |                                    | Late Status Reports                                                                                                                          |
|                           |                                    | Missing Status Reports                                                                                                                       |
|                           | Timesheet Overview Page Portlets   | Timesheet Overview Filter                                                                                                                    |
|                           |                                    | Investment Timesheet Summary                                                                                                                 |
|                           |                                    | Investment Timesheet Review                                                                                                                  |
|                           |                                    | Timesheet Notes                                                                                                                              |
|                           | Timesheet Review Page Portlets     | Timesheet Review                                                                                                                             |
|                           |                                    | <b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page Portlets.          |
|                           | PMO-Project Status-Portlets        | Project Indicators                                                                                                                           |
|                           |                                    | Upcoming Milestones                                                                                                                          |
|                           |                                    | Status Report Indicators                                                                                                                     |
|                           |                                    | Team Utilization                                                                                                                             |
|                           | PMO-Project Storyboard Portlets    | Team Capacity                                                                                                                                |
|                           |                                    | Issues by Priority                                                                                                                           |
|                           |                                    | Issue Listing                                                                                                                                |
|                           |                                    | <b>Note:</b> Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets. |
|                           | Project Default Layout Portlets    | General                                                                                                                                      |
|                           |                                    | Labor Effort                                                                                                                                 |
|                           |                                    | <b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets.    |

| Type | Area                            | Access Right                              |
|------|---------------------------------|-------------------------------------------|
|      | Other Portlets - CA Clarity PPM | Action Items<br>My Projects<br>My Reports |

## PMO Executive Viewer Extended

Members of the PMO Executive Viewer Extended group view all project properties, status reports, schedules, resource allocations, baselines and financials; run project, resource capacity and financial reports.

The following are the access rights included with this group.

| Type                   | Area                | Access Right                                                                                                                                                                                                                                                                          |
|------------------------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                 | General             | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                                                                                                                                 |
|                        | Project Management  | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All<br>Project - Cost Plan - View All<br>Project - Budget Plan - View All<br>Project - Benefit Plan - View All<br>Project - Risk, Issue, Change Request - View - All<br>Status Report - View All |
|                        | Resource Management | Resource - View - All<br>Resource - View Book - All<br>Project - View Requisitions - All                                                                                                                                                                                              |
| Instance (Page - View) | General Tabs        | Sponsor<br>PM Alerts<br>Schedule Performance Drill Down<br>Current Issues Drill Down<br>Staffing Outlook Drill Down<br>Project Dashboard<br>Issues and Risks                                                                                                                          |

| Type                      | Area                                                                             | Access Right                                                                                                                                                              |
|---------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | Resource Planning Page and Tabs                                                  | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations<br>Bookings                               |
|                           | Capacity Planning Overview Page                                                  | Capacity Planning Review                                                                                                                                                  |
|                           | Status Report Review Page and Tabs                                               | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                          |
|                           | Timesheet Overview Page                                                          | Timesheet Overview<br>Timesheet Details<br>Timesheet Notes                                                                                                                |
|                           | Timesheet Review Page and Tab<br><b>Note:</b> This page is a team object action. | Timesheet Review<br>Timesheets<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page.              |
|                           | PMO-Project Storyboard Page                                                      | Issue Drill Down                                                                                                                                                          |
| Instance (Portlet - View) | Sponsor Tab Portlets                                                             | Overview Sponsor Filter<br>Project KPIs by OBS<br>Project Schedule<br>Planned Cost by Project Type                                                                        |
|                           | PM Alerts Tab Portlets                                                           | Overview Project Filter<br>Schedule Performance<br>Schedule Performance Details<br>Milestones<br>Current Issues<br>Current Issues Listing<br>Staffing<br>Staffing Details |

| Type | Area                                | Access Right                                                                                                                                                                                                                                      |
|------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | Project Dashboard Tab Portlets      | Schedule Dashboard<br>Cost and Effort Dashboard<br><b>Note:</b> Overview Project Filter granted above for the PM Alerts Tab Portlets is also required for the Project Dashboard Tab Portlets.                                                     |
|      | Issue and Risks Tab Portlets        | Risk Management<br>Issue Management<br><b>Note:</b> Overview Project Filter granted above for the PM Alerts Tab Portlets is also required for the Issues and Risks Tab Portlets.                                                                  |
|      | Resource Planning Page Portlets     | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|      | Capacity Planning Overview Portlets | Capacity Overview                                                                                                                                                                                                                                 |
|      | Status Report Review Page Portlets  | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports                                                                                                                                             |
|      | Timesheet Overview Page Portlets    | Timesheet Overview Filter<br>Investment Timesheet Summary<br>Investment Timesheet Review<br>Timesheet Notes<br>Pending Estimates Review                                                                                                           |
|      | Timesheet Review Page Portlets      | Timesheet Review<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page Portlets is also required for the Timesheet Review Page Portlets.                                                                                  |

| Type | Area                             | Access Right                                                                                                                                                                                                                           |
|------|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | PMO-Project Status-Portlets      | Project Indicators<br>Upcoming Milestones<br>Project Baselines<br>Status Report Indicators<br>Actuals by Transaction Type<br>Team Utilization                                                                                          |
|      | PMO-Project Storyboard Portlets  | Team Capacity<br>Issues by Priority<br>Issue Listing<br>Earned Value Analysis by Phase<br><b>Note:</b> Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets. |
|      | Project Default Layout Portlets  | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets.                                                                   |
|      | Other Portlets - CA Clarity PPM  | Action Items<br>My Projects<br>My Reports                                                                                                                                                                                              |
|      | Other Portlets - PMO Accelerator | Late Tasks and Milestones<br>Project Analysis<br>Project Cycle Time Analysis<br>Project Document Review<br>Project Lifecycle Review<br>Resource Utilization Percentage by Month<br>Team Member Task Summary                            |

## PMO Financial Administrator

Members of the PMO Financial Administrator group manage functionality related to project financial plans, including the ability to create and edit any financial plan and approve budgets; create and edit financial transactions against any project.

The following are the access rights included with this group.

| Type                      | Area                                                                                          | Access Right                                                                                                                                                                                                                                                                                                                                           |
|---------------------------|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                    | General                                                                                       | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                                                                                                                                                                                                  |
|                           | Project Management                                                                            | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All<br>Project - Cost Plan - Edit All<br>Project - Budget Plan - Edit All<br>Project - Budget Plan - Approve All<br>Project - Benefit Plan - Edit All                                                                                                             |
|                           | Resource Management                                                                           | Resource - Navigate<br>Resource - View - All<br>Resource - Edit Financial All                                                                                                                                                                                                                                                                          |
|                           | Financial Management                                                                          | Administration - Access<br>Financial Maintenance - Financial Management<br>Financial Maintenance - Financial Organizational Structure<br>Financial Maintenance - Define Matrix<br>Financial Maintenance - Manage Matrix<br>Financial Process - Transaction Entry<br>Financial Process - Work in Process<br>Financial Process - Approve WIP Adjustments |
| Instance (Page - View)    | Posted Transaction Review Page                                                                | Posted Transaction Review<br><b>Note:</b> Page ID is cop.finTransactionReview                                                                                                                                                                                                                                                                          |
|                           | Posted Transaction Review Page<br><b>Note:</b> This page is a cost plan detail object action. | Posted Transaction Review<br><b>Note:</b> Page ID is cop.invTransactionReview                                                                                                                                                                                                                                                                          |
| Instance (Portlet - View) | Posted Transaction Review Page Portlet                                                        | Posted Transaction Review<br><b>Note:</b> Portlet ID is cop.finTransactionReview                                                                                                                                                                                                                                                                       |

| Type | Area                                                                                                  | Access Right                                                                                                                                 |
|------|-------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
|      | Posted Transaction Review Page Portlet<br><b>Note:</b> This page is a cost plan detail object action. | Posted Transaction Review<br><b>Note:</b> Portlet ID is cop.invTransactionReview                                                             |
|      | PMO-Project Status Portlets                                                                           | Upcoming Milestones<br>Actuals by Transaction Type                                                                                           |
|      | PMO-Project Storyboard Portlets                                                                       | <b>Note:</b> Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets. |
|      | Project Default Layout Portlets                                                                       | General<br>Labor Effort                                                                                                                      |
|      | Other Portlets - CA Clarity PPM                                                                       | Action Items<br>My Projects<br>My Reports                                                                                                    |

## PMO Idea Creator

Members of the PMO Idea Creator group create and view new ideas.

The following are the access rights included with this group.

| Type                      | Area                            | Access Right                                                                                     |
|---------------------------|---------------------------------|--------------------------------------------------------------------------------------------------|
| Global                    | General                         | Account Settings - Navigate<br>Organizer - Access                                                |
|                           | Project Management              | Projects - Navigate                                                                              |
|                           | Idea Management                 | Ideas - Create<br>Idea - Edit Financial Information All<br>Idea - View Financial Information All |
|                           | Resource Management             | Resource - View - All<br>Resource - Hard Book – All<br>Resource - Soft Book - All                |
| Instance (Portlet - View) | Other Portlets - CA Clarity PPM | Action Items<br>My Projects                                                                      |

## PMO Idea Reviewer

Members of the PMO Idea Reviewer group review and approve ideas, including ability to edit all ideas.

The following are the access rights included with this group.

| Type                      | Area                            | Access Right                                                                                                                                                                                                                                                                                                                           |
|---------------------------|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                    | General                         | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                                                                                                                                                                                  |
|                           | Project Management              | Projects - Navigate                                                                                                                                                                                                                                                                                                                    |
|                           | Idea Management                 | Ideas - Create<br>Idea - Edit – All<br>Idea - Approve - All<br>Idea - Benefit Plan - Edit All<br>Idea - Budget Plan - Approve All<br>Idea - Budget Plan - Edit All<br>Idea - Cost Plan - Edit All<br>Idea - Edit Financial Information All<br>Idea - Financial Plan - Submit All for Approval<br>Idea - View Financial Information All |
|                           | Resource Management             | Resource - View - All                                                                                                                                                                                                                                                                                                                  |
| Instance (Page - View)    | General Tabs                    | Sponsor                                                                                                                                                                                                                                                                                                                                |
| Instance (Portlet - View) | Sponsor Tab Portlets            | Overview Sponsor Filter<br>Project KPIs by OBS<br>Project Schedule<br>Planned Cost by Project Type                                                                                                                                                                                                                                     |
|                           | Other Portlets - CA Clarity PPM | Action Items<br>My Projects<br>My Reports                                                                                                                                                                                                                                                                                              |

## PMO Investment Creator

Members of the PMO Investment Creator group create and view all investment types.

The following are the access rights included with this group.

| Type   | Area                            | Access Right                                                                                                         |
|--------|---------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Global | General                         | Account Settings - Navigate<br>Organizer - Access                                                                    |
|        | Project Management              | Projects - Navigate<br>Project - Create<br>Project - Create from Template                                            |
|        | Application Management          | Application - Create<br>Application - Edit Financial Information All<br>Application - View Financial Information All |
|        | Asset Management                | Asset - Create<br>Asset - Edit Financial Information All<br>Asset - View Financial Information All                   |
|        | Idea Management                 | Ideas - Create<br>Idea - Edit Financial Information All<br>Idea - View Financial Information All                     |
|        | Other Work Management           | Other Work - Create<br>Other Work - Edit Financial Information All<br>Other Work - View Financial Information All    |
|        | Product Management              | Product - Create<br>Product - Edit Financial Information All<br>Product - View Financial Information All             |
|        | Service Management              | Service - Create<br>Service - Edit Financial Information All<br>Service - View Financial Information All             |
|        | Resource Management             | Resource - View - All                                                                                                |
|        | Other Portlets - CA Clarity PPM | Action Items<br>My Projects                                                                                          |

## PMO Investment Viewer Extended

Members of the PMO Investment Viewer Extended group view properties, resource allocations, and financial plans of all investment types.

The following are the access rights included with this group.

| Type   | Area                   | Access Right                                                                                                                                                                                                                                                                          |
|--------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global | General                | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                                                                                                                                 |
|        | Project Management     | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All<br>Project - Cost Plan - View All<br>Project - Budget Plan - View All<br>Project - Benefit Plan - View All<br>Project - Risk, Issue, Change Request - View - All<br>Status Report - View All |
|        | Program Management     | Management - Programs                                                                                                                                                                                                                                                                 |
|        | Application Management | Application - View – All<br>Application - View Financial Information All<br>Application - Cost Plan - View All<br>Application - Budget Plan - View All<br>Application Benefit Plan - View All                                                                                         |
|        | Asset Management       | Asset - View – All<br>Asset - View Financial Information All<br>Asset - Cost Plan - View All<br>Asset - Budget Plan - View All<br>Asset Benefit Plan - View All                                                                                                                       |
|        | Idea Management        | Idea - View - All<br>Idea - Benefit Plan - View All<br>Idea - Budget Plan - View All<br>Idea - Cost Plan - View All<br>Idea - View Financial Information All                                                                                                                          |
|        |                        |                                                                                                                                                                                                                                                                                       |

| Type                   | Area                               | Access Right                                                                                                                                                                             |
|------------------------|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Instance (Page – View) | Other Work Management              | Other Work - View – All<br>Other Work - View Financial Information All<br>Other Work - Cost Plan - View All<br>Other Work - Budget Plan - View All<br>Other Work Benefit Plan - View All |
|                        | Product Management                 | Product - View – All<br>Product - View Financial Information All<br>Product - Cost Plan - View All<br>Product - Budget Plan - View All<br>Product Benefit Plan - View All                |
|                        | Service Management                 | Service - View – All<br>Service - View Financial Information All<br>Service - Cost Plan - View All<br>Service - Budget Plan - View All<br>Service Benefit Plan - View All                |
|                        | Resource Management                | Resource - View – All<br>Resource - View Book - All<br>Project - View Requisitions - All                                                                                                 |
|                        | Resource Planning Page and Tabs    | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations<br>Bookings                                              |
|                        | Capacity Planning Overview Page    | Capacity Planning Review                                                                                                                                                                 |
|                        | Status Report Review Page and Tabs | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                                         |
|                        | Timesheet Overview Page            | Timesheet Overview<br>Timesheet Details<br>Timesheet Notes                                                                                                                               |

| Type                      | Area                                                                             | Access Right                                                                                                                                                                                                                                      |
|---------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Instance (Portlet – View) | Timesheet Review Page and Tab<br><b>Note:</b> This page is a team object action. | Timesheet Review<br>Timesheets<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page.                                                                                      |
|                           | PMO-Project Storyboard Page                                                      | Issues Drill Down                                                                                                                                                                                                                                 |
|                           | Resource Planning Page Portlets                                                  | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|                           | Capacity Planning Overview Portlets                                              | Capacity Overview                                                                                                                                                                                                                                 |
|                           | Status Report Review Page Portlets                                               | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports                                                                                                                                             |
|                           | Timesheet Overview Page Portlets                                                 | Timesheet Overview Filter<br>Investment Timesheet Summary<br>Investment Timesheet Review<br>Timesheet Notes<br>Pending Estimates Review                                                                                                           |
|                           | Timesheet Review Page Portlets                                                   | Timesheet Review<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page Portlets is also required for the Timesheet Review Page Portlets.                                                                                  |
|                           | PMO-Program Status Portlets                                                      | Cost and Schedule Overview<br>Schedule and Progress<br>Resource Utilization                                                                                                                                                                       |

| Type | Area                             | Access Right                                                                                                                                                                                                                                                                      |
|------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | Program Layout Portlets          | General<br>Labor Effort<br>Subprojects                                                                                                                                                                                                                                            |
|      | PMO-Project Status Portlets      | Project Indicators<br>Upcoming Milestones<br>Project Baselines<br>Status Report Indicators<br>Actuals by Transaction Type<br>Team Utilization                                                                                                                                     |
|      | PMO-Project Storyboard Portlets  | Team Capacity<br>Issues by Priority<br>Issues Listing<br>Earned Value Analysis by Phase<br><b>Note:</b> Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets.                                           |
|      | Project Default Layout Portlets  | <b>Note:</b> General and Labor Effort granted above for the Program Layout Portlets is also required for the Project Default Layout Portlets.<br><br>Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets. |
|      | Other Portlets – CA Clarity PPM  | Action Items<br>My Projects<br>My Reports                                                                                                                                                                                                                                         |
|      | Other Portlets – PMO Accelerator | Late Tasks and Milestones<br>Project Analysis<br>Project Cycle Time Analysis<br>Project Document Review<br>Project Lifecycle Review<br>Resource Utilization Percentage by Month<br>Team Member Task Summary                                                                       |

## PMO Portfolio Manager

Members of the PMO Portfolio Manager group manage portfolios across investments.

The following are the access rights included with this group.

| Type                      | Area                              | Access Right                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                    | General                           | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                           | Project Management                | Projects - Navigate                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|                           | Portfolio Management              | Portfolio - Navigate<br>Portfolio – Create                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                           | Resource Management               | Resource - View – All                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Instance (Page – View)    | Portfolio Dashboard Page and Tabs | Portfolio Dashboard<br>Cost and Benefits<br>Roles<br>Cost and Health<br>Goal Analysis<br>Investment Analysis<br>Capital and Operating                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Instance (Portlet – View) | Portfolio Dashboard Portlets      | Portfolio Dashboard Filter<br>Portfolio Costs<br>Portfolio Cost and Benefit Analysis<br>Portfolio Roles<br>Portfolio Role Analysis<br>Portfolio Cost by Overall Health<br>Portfolio Investment Count by Goal<br>Portfolio Planned Cost by Goal<br>Portfolio Role Demand by Goal<br>Portfolio Planned NPV by Goal<br>Portfolio Investment Count by Type<br>Portfolio Investment Count by Work Status<br>Portfolio Investment Count by Waterline<br>Portfolio Investment Count by Approval<br>Portfolio Capital and Operating Costs<br>Portfolio Capital and Operating Cost Analysis |

| Type | Area                                        | Access Right                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | PMO-Portfolio Investment Dashboard Portlets | Portfolio Investment Dashboard Filter<br>Planned Cost by Waterline<br>Role Demand by Waterline<br>Planned Cost by Goal<br>Role Demand by Goal<br>Investment Cost and Role Demand<br>Investment Schedule<br>Role Capacity and Demand<br>Role Capacity and Demand Histogram<br>Investment Planning by Period<br>Investment Cost by Period<br>Investment Financial Summary<br>Capital and Operating Cost Summary<br>Capital and Operating Budget vs. Forecast |
|      | Other Portlets – CA Clarity PPM             | Action Items<br>My Projects<br>My Reports                                                                                                                                                                                                                                                                                                                                                                                                                  |

## PMO Program Manager

Members of the PMO Program Manager group manage programs containing several projects.

The following are the access rights included with this group.

| Type   | Area    | Access Right                                                          |
|--------|---------|-----------------------------------------------------------------------|
| Global | General | Account Settings - Navigate<br>Organizer - Access<br>Reports - Access |

| Type                      | Area                               | Access Right                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | Project Management                 | Projects - Navigate<br>Project - Enable Financial<br>Project - Cost Plan - Edit All<br>Project - Budget Plan - Edit All<br>Project - Budget Plan - Approval All<br>Project - Benefit Plan - Edit All<br>Project - Risk, Issue, Change Request - Edit - All<br>Project - Risk, Issue, Change Request - Delete - All<br>Status Report - Create<br>Status Report - Edit All |
|                           | Program Management                 | Management - Programs                                                                                                                                                                                                                                                                                                                                                    |
|                           | Resource Management                | Resource - View – All                                                                                                                                                                                                                                                                                                                                                    |
| Instance (Page – View)    | General Tabs                       | Program Dashboard<br>Program Manager Cost Dashboard Drill Down<br>Project Costs By Phase<br>Project Costs By Task<br>Project Costs By Resource<br>Project Storyboard Drill Down<br>Issues Drill Down<br>Issues and Risks                                                                                                                                                 |
|                           | Status Report Review Page and Tabs | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                                                                                                                                                                                                                         |
| Instance (Portlet – View) | Program Dashboard Tab Portlets     | Overview Program Filter<br>Program Manager Cost Dashboard<br>Project Costs by Phase<br>Project Costs by Task<br>Project Costs by Resource<br>Program Manager Schedule Dashboard<br>Team Capacity<br>Upcoming Milestones<br>Issues by Priority<br>Issues Listing<br>Earned Value Analysis by Phase                                                                        |

| Type | Area                               | Access Right                                                                                          |
|------|------------------------------------|-------------------------------------------------------------------------------------------------------|
|      | Issues and Risks Tab Portlets      | Overview Project Filter<br>Risk Management<br>Issue Management                                        |
|      | Status Report Review Page Portlets | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports |
|      | PMO-Program Status Portlets        | Cost and Schedule Overview<br>Schedule and Progress<br>Resource Utilization                           |
|      | Program Layout Portlets            | General<br>Labor Effort<br>Subprojects                                                                |
|      | Other Portlets – CA Clarity PPM    | Action Items<br>My Projects<br>My Reports                                                             |

## PMO Project Creator

Members of the PMO Project Creator group create and view new projects.

The following are the access rights included with this group.

| Type   | Area                            | Access Right                                                                                            |
|--------|---------------------------------|---------------------------------------------------------------------------------------------------------|
| Global | General                         | Account Settings - Navigate<br>Organizer - Access                                                       |
|        | Project Management              | Projects – Navigate<br>Project – Create<br>Project – Create from Template<br>Project – Enable Financial |
|        | Resource Management             | Resource - View – All                                                                                   |
|        | Other Portlets – CA Clarity PPM | Action Items<br>My Projects                                                                             |

## PMO Project Manager

Members of the PMO Project Manager group manage project properties, status reports, schedules, and resource allocations.

The following are the access rights included with this group.

| Type                   | Area                               | Access Right                                                                                                                                                                                                                                           |
|------------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                 | General                            | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access                                                                                                                                                                                  |
|                        | Project Management                 | Projects - Navigate<br>Project - Enable Financial<br>Project - Modify Baseline All<br>Project - Risk, Issue, Change Request - Edit - All<br>Project - Risk, Issue, Change Request - Delete - All<br>Status Report - Create<br>Status Report - Edit All |
|                        | Resource Management                | Resource - View - All<br>Resource - Hard Book All                                                                                                                                                                                                      |
| Instance (Page – View) | General Tabs                       | Project Dashboard                                                                                                                                                                                                                                      |
|                        | Resource Planning Page and Tabs    | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations                                                                                                                        |
|                        | Status Report Review Page and Tabs | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                                                                                                       |
|                        | Timesheet Overview Page            | Timesheet Overview<br>Timesheet Details<br>Timesheet Notes                                                                                                                                                                                             |

| Type                      | Area                                                                             | Access Right                                                                                                                                                                                                                    |
|---------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | Timesheet Review Page and Tab<br><b>Note:</b> This page is a team object action. | Timesheet Review<br>Timesheets<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page.                                                                    |
|                           | PMO-Project Storyboard Page                                                      | Issues Drill Down                                                                                                                                                                                                               |
| Instance (Portlet – View) | Project Dashboard Tab Portlets                                                   | Overview Project Filter<br>Schedule Dashboard<br>Cost and Effort Dashboard                                                                                                                                                      |
|                           | Resource Planning Page Portlets                                                  | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements |
|                           | Status Report Review Page Portlets                                               | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports                                                                                                                           |
|                           | Timesheet Overview Page Portlets                                                 | Timesheet Overview Filter<br>Investment Timesheet Summary<br>Investment Timesheet Review<br>Timesheet Notes                                                                                                                     |
|                           | Timesheet Review Page Portlets                                                   | Timesheet Review<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page Portlets is also required for the Timesheet Review Page Portlets.                                                                |
|                           | PMO-Project Status Portlets                                                      | Status Report Indicators<br>Team Utilization                                                                                                                                                                                    |
|                           | PMO-Project Storyboard Portlets                                                  | Issues by Priority<br>Issues Listing                                                                                                                                                                                            |

| Type | Area                            | Access Right                                                                                                                                                         |
|------|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | Project Default Layout Portlets | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets. |
|      | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports                                                                                                                            |

## PMO Project Manager Extended

Members of the PMO Project Manager Extended group manage project properties, status reports, schedules, resource allocations, tasks, baselines, and financial plans.

The following are the access rights included with this group.

| Type   | Area                | Access Right                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global | General             | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access                                                                                                                                                                                                                                                                                                                                                                      |
|        | Project Management  | Projects - Navigate<br>Project - Enable Financial<br>Project - Modify Baseline All<br>Project - Schedule In Browser<br>Project - Cost Plan - Edit All<br>Project - Budget Plan - Edit All<br>Project - Budget Plan - Approval All<br>Project - Benefit Plan - Edit All<br>Project - Risk, Issue, Change Request - Edit - All<br>Project - Risk, Issue, Change Request - Delete - All<br>Status Report - Create<br>Status Report - Edit All |
|        | Resource Management | Resource - View - All<br>Resource - Hard Book All<br>Resource - Soft Book All<br>Project - Create/Edit Requisitions - All<br>Project - Attach Requisitions Entry Resources - All                                                                                                                                                                                                                                                           |

| Type                      | Area                                                                                           | Access Right                                                                                                               |
|---------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Instance (Page – View)    | General Tabs                                                                                   | PM Alerts                                                                                                                  |
|                           |                                                                                                | Schedule Performance Drill Down                                                                                            |
|                           |                                                                                                | Current Issues Drill Down                                                                                                  |
|                           |                                                                                                | Staffing Outlook Drill Down                                                                                                |
|                           |                                                                                                | Project Dashboard                                                                                                          |
|                           |                                                                                                | Issues and Risks                                                                                                           |
|                           | Resource Planning Page and Tabs                                                                | Resource Planning                                                                                                          |
|                           |                                                                                                | Capacity                                                                                                                   |
|                           |                                                                                                | Organizational Demand                                                                                                      |
|                           |                                                                                                | Top Down Planning                                                                                                          |
|                           |                                                                                                | Workloads                                                                                                                  |
|                           |                                                                                                | Allocations                                                                                                                |
|                           |                                                                                                | Unfilled Allocations                                                                                                       |
|                           |                                                                                                | Bookings                                                                                                                   |
|                           | Capacity Planning Overview Page                                                                | Capacity Planning Review                                                                                                   |
|                           | Status Report Review Page and Tabs                                                             | Status Report Review                                                                                                       |
|                           |                                                                                                | Status Report Listing                                                                                                      |
|                           |                                                                                                | Late and Missing Status Reports                                                                                            |
|                           | Timesheet Overview Page                                                                        | Timesheet Overview                                                                                                         |
|                           |                                                                                                | Timesheet Details                                                                                                          |
|                           |                                                                                                | Timesheet Notes                                                                                                            |
|                           | Timesheet Review Page and Tab                                                                  | Timesheet Review                                                                                                           |
|                           | <b>Note:</b> This page is a team object action.                                                | Timesheets                                                                                                                 |
|                           |                                                                                                | <b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page. |
|                           | PMO-Project Storyboard Page                                                                    | Issues Drill Down                                                                                                          |
| Instance (Portlet – View) | Sponsor Tab Portlets                                                                           | Project KPIs by OBS                                                                                                        |
|                           | <b>Note:</b> Group does not have rights to the Sponsor Tab, but it has access to the portlets. | Project Schedule                                                                                                           |
|                           |                                                                                                | Planned Cost by Project Type                                                                                               |

| Type | Area                                | Access Right                                                                                                                                                                                                                                      |
|------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | PM Alerts Tab Portlets              | Overview Project Filter<br>Schedule Performance<br>Schedule Performance Details<br>Milestones<br>Current Issues<br>Current Issues Listing<br>Staffing<br>Staffing Details                                                                         |
|      | Project Dashboard Tab Portlets      | Schedule Dashboard<br>Cost and Effort Dashboard<br><b>Note:</b> Overview Project Filter granted above for the PM Alerts Tab Portlets is also required for the Project Dashboard Tab Portlets.                                                     |
|      | Issues and Risks Tab Portlets       | Risk Management<br>Issue Management<br><b>Note:</b> Overview Project Filter granted above for the PM Alerts Tab Portlets is also required for the Issues and Risks Tab Portlets.                                                                  |
|      | Resource Planning Page Portlets     | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|      | Capacity Planning Overview Portlets | Capacity Overview                                                                                                                                                                                                                                 |
|      | Status Report Review Page Portlets  | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports                                                                                                                                             |

| Type | Area                             | Access Right                                                                                                                                                                                                                            |
|------|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | Timesheet Overview Page Portlets | Timesheet Overview Filter<br>Investment Timesheet Summary<br>Investment Timesheet Review<br>Timesheet Notes<br>Pending Estimates Review                                                                                                 |
|      | Timesheet Review Page Portlets   | Timesheet Review<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page Portlets is also required for the Timesheet Review Page Portlets.                                                                        |
|      | PMO-Project Status Portlets      | Project Indicators<br>Upcoming Milestones<br>Project Baselines<br>Status Report Indicators<br>Actuals by Transaction Type<br>Team Utilization                                                                                           |
|      | PMO-Project Storyboard Portlets  | Team Capacity<br>Issues by Priority<br>Issues Listing<br>Earned Value Analysis by Phase<br><b>Note:</b> Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets. |
|      | Project Default Layout Portlets  | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets.                                                                    |
|      | Other Portlets – CA Clarity PPM  | Action Items<br>My Projects<br>My Reports                                                                                                                                                                                               |
|      | Other Portlets – PMO Accelerator | Late Tasks and Milestones<br>Project Cycle Time Analysis<br>Project Document Review<br>Project Lifecycle Review<br>Team Member Task Summary                                                                                             |

## PMO Project Viewer

Members of the PMO Project Viewer group view all projects and project related portlets and reports.

The following are the access rights included with this group.

| Type                      | Area                               | Access Right                                                                                                                                                                             |
|---------------------------|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                    | General                            | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access                                                                                                                    |
|                           | Project Management                 | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All<br>Project - Risk, Issue, Change Request - View - All<br>Status Report - View All               |
|                           | Resource Management                | Resource - View - All                                                                                                                                                                    |
| Instance (Page – View)    | General Tabs                       | Project Dashboard<br>Issues and Risks                                                                                                                                                    |
|                           | Status Report Review Page and Tabs | Status Report Review<br>Status Report Listing<br>Late and Missing Status Reports                                                                                                         |
|                           | PMO-Project Storyboard Page        | Issues Drill Down                                                                                                                                                                        |
| Instance (Portlet – View) | Project Dashboard Tab Portlets     | Overview Project Filter<br>Schedule Dashboard<br>Cost and Effort Dashboard                                                                                                               |
|                           | Issues and Risks Tab Portlets      | Risk Management<br>Issue Management<br><b>Note:</b> Overview Project Filter granted above for the Project Dashboard Tab Portlets is also required for the Issues and Risks Tab Portlets. |
|                           | Status Report Review Page Portlets | Status Report Review Filter<br>Status Report Listing<br>Late Status Reports<br>Missing Status Reports                                                                                    |
|                           | PMO-Project Status Portlets        | Status Report Indicators<br>Team Utilization                                                                                                                                             |

| Type | Area                            | Access Right                                                                                                                                                         |
|------|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | PMO-Project Storyboard Portlets | Issues by Priority<br>Issues Listing                                                                                                                                 |
|      | Project Default Layout Portlets | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets. |
|      | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports                                                                                                                            |

## PMO Resource Administrator

Members of the PMO Resource Administrator group create new resources or roles and edit the properties for any resource; view all projects and adjust resource allocations across projects.

The following are the access rights included with this group.

| Type   | Area                | Access Right                                                                                                                                                  |
|--------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global | General             | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access                                                                                         |
|        | Resource Management | Resource - Navigate<br>Resource - Create<br>Resource - View - All<br>Resource - Edit - All<br>Resource - Edit Financial All<br>Resource - Update Skills - All |

| Type                      | Area                                | Access Right                                                                                                                                                                                                                                      |
|---------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Instance (Page – View)    | Resource Planning Page and Tabs     | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations<br>Bookings                                                                                                       |
|                           | Capacity Planning Overview Page     | Capacity Planning Review                                                                                                                                                                                                                          |
| Instance (Portlet – View) | Resource Planning Page Portlets     | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|                           | Capacity Planning Overview Portlets | Capacity Overview                                                                                                                                                                                                                                 |
|                           | Other Portlets – CA Clarity PPM     | Action Items                                                                                                                                                                                                                                      |
|                           |                                     | My Projects<br>My Reports                                                                                                                                                                                                                         |

## PMO Resource Manager

Members of the PMO Resource Manager group manage the schedules of direct reports, adjust their allocations on projects, and view all projects.

The following are the access rights included with this group.

| Type   | Area    | Access Right                |
|--------|---------|-----------------------------|
| Global | General | Account Settings – Navigate |
|        |         | Organizer – Access          |
|        |         | Reports – Access            |

| Type                      | Area                                | Access Right                                                                                                                                                                                                                                      |
|---------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | Project Management                  | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All                                                                                                                                                          |
|                           | Resource Management                 | Resource - View - All<br>Resource - Hard Book All<br>Resource - Soft Book All                                                                                                                                                                     |
| Instance (Page – View)    | Resource Planning Page and Tabs     | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations<br>Bookings                                                                                                       |
|                           | Capacity Planning Overview Page     | Capacity Planning Review                                                                                                                                                                                                                          |
| Instance (Portlet – View) | Resource Planning Page Portlets     | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|                           | Capacity Planning Overview Portlets | Capacity Overview                                                                                                                                                                                                                                 |
|                           | PMO-Project Status Portlets         | Team Utilization                                                                                                                                                                                                                                  |
|                           | PMO-Project Storyboard Portlets     | Team Capacity                                                                                                                                                                                                                                     |
|                           | Project Default Layout Portlets     | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets.                                                                              |

| Type | Area                            | Access Right                              |
|------|---------------------------------|-------------------------------------------|
|      | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports |

## PMO Resource Manager Extended

Members of the PMO Resource Manager Extended group manage the schedules of direct reports, adjust their allocations on projects and skills, access requisitions, and view all projects.

The following are the access rights included with this group.

| Type                   | Area                            | Access Right                                                                                                                                                                                                                                            |
|------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global                 | General                         | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access                                                                                                                                                                                   |
|                        | Project Management              | Projects - Navigate<br>Project - View Management - All<br>Project - View Financial - All                                                                                                                                                                |
|                        | Resource Management             | Resource - View - All<br>Resource - Hard Book All<br>Resource - Soft Book All<br>Resource - Update Skills - All<br>Project - Create/Edit Requisitions - All<br>Project - Attach Requisitions Entry Resources - All<br>Project - View Requisitions - All |
| Instance (Page – View) | Resource Planning Page and Tabs | Resource Planning<br>Capacity<br>Organizational Demand<br>Top Down Planning<br>Workloads<br>Allocations<br>Unfilled Allocations<br>Bookings                                                                                                             |
|                        | Capacity Planning Overview Page | Capacity Planning Overview                                                                                                                                                                                                                              |

| Type                      | Area                                                                             | Access Right                                                                                                                                                                                                                                      |
|---------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | Timesheet Overview Page                                                          | Timesheet Overview<br>Timesheet Details<br>Timesheet Notes                                                                                                                                                                                        |
|                           | Timesheet Review Page and Tab<br><b>Note:</b> This page is a team object action. | Timesheet Review<br>Timesheets<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page is also required for the Timesheet Review Page.                                                                                      |
| Instance (Portlet – View) | Resource Planning Page Portlets                                                  | Role Capacity Histogram<br>Role Capacity<br>OBS Resource Aggregation<br>OBS Investment Aggregation<br>Top Down Planning by Investment<br>Resource Workloads<br>Weekly Detail<br>Allocation Discrepancy<br>Unfilled Requirements<br>Booking Status |
|                           | Capacity Planning Overview Portlets                                              | Capacity Overview                                                                                                                                                                                                                                 |
|                           | Timesheet Overview Page Portlets                                                 | Timesheet Overview Filter<br>Investment Timesheet Summary<br>Investment Timesheet Review<br>Timesheet Notes                                                                                                                                       |
|                           | Timesheet Review Page Portlets                                                   | Timesheet Review<br><b>Note:</b> Timesheet Notes granted above for the Timesheet Overview Page Portlets is also required for the Timesheet Review Page Portlets.                                                                                  |
|                           | PMO-Project Status Portlets                                                      | Team Utilization                                                                                                                                                                                                                                  |
|                           | PMO-Project Storyboard Portlets                                                  | Team Capacity                                                                                                                                                                                                                                     |
|                           | Project Default Layout Portlets                                                  | General<br>Labor Effort<br><b>Note:</b> Team Utilization granted above for the PMO-Project Status Portlets is also required for the Project Default Layout Portlets.                                                                              |

| Type | Area                            | Access Right                              |
|------|---------------------------------|-------------------------------------------|
|      | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports |

## PMO System Administrator

Members of the PMO System Administrator group manage the system by having all global rights to access features and edit all records in the system.

## PMO Team Member

Members of the PMO Team Member group create and submit timesheets.

The following are the access rights included with this group.

| Type                      | Area                             | Access Right                                      |
|---------------------------|----------------------------------|---------------------------------------------------|
| Global                    | General                          | Account Settings – Navigate<br>Organizer – Access |
|                           | Project Management               | Projects – Navigate                               |
|                           | Resource Management              | Resource - View – All                             |
|                           | Timesheet Management             | Timesheet Navigate                                |
| Instance (Portlet – View) | Other Portlets – CA Clarity PPM  | Action Items<br>My Projects                       |
|                           | Other Portlets – PMO Accelerator | My Timesheets                                     |

## PMO Timesheet Administrator

Members of the PMO Timesheet Administrator group manage timesheet approval; submit and approve all timesheets.

The following are the access rights included with this group.

| Type                     | Area                            | Access Right                                                           |
|--------------------------|---------------------------------|------------------------------------------------------------------------|
| Global                   | General                         | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access  |
|                          | Resource Management             | Resource - View – All                                                  |
|                          | Timesheet Management            | Timesheet Navigate<br>Timesheet - Edit All<br>Timesheet - Approval All |
| Instance(Portlet – View) | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports                              |

## PMO Vendor Management

Members of the PMO Vendor Management group access vendor related reports and views.

The following are the access rights included with this group.

| Type                      | Area                            | Access Right                                                          |
|---------------------------|---------------------------------|-----------------------------------------------------------------------|
| Global                    | General                         | Account Settings – Navigate<br>Organizer – Access<br>Reports – Access |
|                           | Project Management              | Projects – Navigate                                                   |
| Instance (Portlet – View) | Other Portlets – CA Clarity PPM | Action Items<br>My Projects<br>My Reports                             |

## PPM Essentials Accelerator Access Rights

The PPM Essentials Accelerator includes access groups that represent specific project roles. The content included with the accelerator is designed for the access groups. Each access group is associated with a set of access rights that allows group members access to secured pages, portlets, and reports.

The access groups with the access rights provide you with a starting point for ensuring that the right users access the right pages. You can add your users to the access groups or modify the access groups and rights.

You require the following access rights to work with the PPM Essentials Accelerator:

- [PPM Essentials Accelerator Access Rights](#) (see page 214)
- [PPM Essentials Accelerator Group Access Rights](#) (see page 215)

## PPM Essentials Accelerator Access Rights

The following access rights are included with the PPM Essentials Accelerator:

### **Status Report - Create**

Allows you to create status reports. This includes the page navigation access right.

**Type:** Global

### **Status Report - Edit**

Allows the user to edit specific status reports.

**Type:** Instance

### **Status Report - Edit All**

Allows you to edit all status reports. This includes the page navigation access right.

**Type:** Global

### **Status Report - View**

Allows the user to view specific status reports.

**Type:** Instance

### **Status Report - View All**

Allows the user to view all status reports. This includes the page navigation access right.

**Type:** Global

**Status Report - XOG Access**

Allows the user to import and export status reports using the XML Open Gateway (XOG) interface.

**Type:** Global

## PPM Essentials Accelerator Access Groups

You require the following group access rights to work with PPM Essentials Accelerator:

- [PPM Essentials Demand Manager Group Access Rights](#) (see page 215)
- [PPM Essentials Executive Group Access Rights](#) (see page 216)
- [PPM Essentials Idea Requestor Group Access Rights](#) (see page 218)
- [PPM Essentials Project Manager Group Access Rights](#) (see page 219)
- [PPM Essentials Resource Manager Group Access Rights](#) (see page 221)
- [PPM Essentials Team Member Group Access Rights](#) (see page 223)

## PPM Essentials Demand Manager Group Access Rights

The following access rights are included with the PPM Essentials Demand Manager access group:

**Idea - Approve - All**

Lets you approve all ideas.

**Type:** Global

**Idea - Edit - All**

Lets you edit all ideas. The access right includes the Idea - View access and the ability to delete all ideas.

**Type:** Global

**Idea - Edit Access Rights - All**

Lets you edit the access rights for all ideas. The right does not include the Ideas - Navigate or Idea - View access.

**Type:** Global

**Idea - Hierarchy - Parents - Add - All**

Lets you add investments to the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - Edit - All**

Lets you edit investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - View - All**

Lets you view investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - View - All**

Lets you view all ideas. The right includes the Ideas - Navigate access.

**Type:** Global

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

## PPM Essentials Executive Group Access Rights

The following access rights are included with the PPM Essentials Executive access group:

**Idea - Approve - All**

Lets you approve all ideas.

**Type:** Global

**Idea - Edit - All**

Lets you edit all ideas. The access right includes the Idea - View access and the ability to delete all ideas.

**Type:** Global

**Idea - Hierarchy - Parents - Edit - All**

Lets you edit investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - Hierarchy - Parents - View - All**

Lets you view investments in the Parent Hierarchy for any idea.

**Type:** Global

**Idea - View - All**

Lets you view all ideas. The right includes the Ideas - Navigate access.

**Type:** Global

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Book - All**

Allows users to view bookings for all resources.

**Type:** Global

**Resource - View Financial - All**

Allows users to view financial properties for all resources.

**Required:** *Resource - Navigate* right

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Project - Risk, Issue, Change Request - View**

Allows users to view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

## PPM Essentials Idea Requestor Group Access Rights

The following access rights are included with the Idea Requestor access group:

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

**Page - View**

Allows you to view a general page in CA Clarity PPM. This access is not required for instance pages, such as portfolio pages.

**Type:** Instance

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

## PPM Essentials Project Manager Group Access Rights

The following access rights are included with the PPM Essentials Project Manager access group:

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Create from Template**

Allows you to create new projects using project templates.

**Type:** Global

**Project - Risk, Issue, Change Request - Delete - All**

Allows you to delete risks, issues, and change requests for all projects.

**Type:** Global

**Project - Risk, Issue, Change Request - Edit - All**

Allows you to create and edit risks, issues, and change requests for any project.

**Type:** Global

**Reports - Access**

Allows you to access the reports pages if you have the Reports - Run - All access right or instance-level access rights such as Report - Run, Report - View Output or Report - Edit Properties.

**Type:** Global

**Reports - Run - All**

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

**Type:** Global

**Reports - View Output - All**

Allows you to view the output of any report. This right is dependent on being granted the Reports - Access access right.

**Type:** Global

**Resource - External Access**

Allows users access to the Resources, Resource Finder, and Resource Requisitions menus and property pages under Resource Management. Control user read/write access to data on these pages by setting the instance and global access rights for resources, projects, and requisitions.

**Type:** Global

**Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

**Resource - Soft Book - All**

Allows users to soft book any resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Status Report - Create**

Allows you to create status reports. This includes the page navigation access right.

**Type:** Global

**Status Report - Edit All**

Allows you to edit all status reports. This includes the page navigation access right.

**Type:** Global

**Status Report - View All**

Allows users to view all status reports. This right includes the page navigation access right.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to the *Timesheets* list page. This page displays all of the timesheets to which you have access rights to view, edit, or approve.

**Type:** Global

**Page - View**

Allows you to view a general page in CA Clarity PPM. This access is not required for instance pages, such as portfolio pages.

**Type:** Instance

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Allows users to view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

## PPM Essentials Resource Manager Group Access Rights

The following access rights are included with the PPM Essentials Resource Manager access group:

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Portlet Viewer - All**

Lets you view and add stock portlets to portlet pages. The right helps add a stock portlet to a personal dashboard.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to the *Timesheets* list page. This page displays all of the timesheets to which you have access rights to view, edit, or approve.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Project - Attach Requisitions Resources**

Lets you attach resources to requisition entries and includes adding, editing, proposing, or deleting resources from the request results page. The privilege lets users to change project statuses to "Proposed" and "Booked". This right includes the Project – View Requisitions access.

**Type:** Instance

**Project - View**

Lets you view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

**Resource - Hard Book**

Allows users to soft and hard book a specific resource for investments to which they have view or edit rights.

**Type:** Global

**Resource - Soft Book**

Allows users to soft book a specific resource or role to an investment.

**Type:** Instance

**Resource - View**

Allows users to view all of information for a specific resource, except for financial information.

**Type:** Instance

**Resource - View Book**

Allows users to view bookings for a specific resource.

**Type:** Instance

**Resource - View Financial**

Allows users to view general and financial information for a specific resource.

**Required:** *Resource - Navigate* right

**Type:** Instance

## PPM Essentials Team Member Group Access Rights

The following access rights are included with the PPM Essentials Team Member access group:

**Ideas - Create**

Allows you to create instances of the idea object. The right includes the Ideas - Navigate access.

**Type:** Global

**Project - View Tasks - All**

Allows users to view tasks and work breakdown structure for any project the user has been granted access.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Portfolio - View**

Allows you to view a specific portfolio.

**Required:** Portfolio - Navigate to access the Portfolio Management menu.

**Type:** Instance

**Project - Risk, Issue, Change Request - View - All**

Lets you view all risks, issues, and change requests for a specific project.

**Type:** Global

**Project - View**

Lets you view the general, management, financial properties, custom defined fields, roster, tasks, processes, and subprojects for a specific project.

**Type:** Instance

**Project - View Management**

Allows users to view management properties, roster, and key tasks of a specific project. This right also allows users view the project in a project scheduler, such as Microsoft Project.

**Type:** Instance

## PRINCE2 Access Rights

The PRINCE2 Accelerator includes certain access groups. Each access group is associated with certain access rights which allow group members access to secured pages, portlets, and reports. Also, the users require associating with the OBS that the PRINCE2 project is associated with for full visibility and access to the project.

In addition to the required access rights, associate with the entity that is associated with the PRINCE2 project. Such association ensures full visibility and access to a project.

The following access groups are included in the PRINCE2 Accelerator:

- [PRINCE2 Administrator Group](#) (see page 224)
- [PRINCE2 Executive/Senior User Group](#) (see page 225)
- [PRINCE2 Project Manager Group](#) (see page 229)
- [PRINCE2 Project Support Staff Group](#) (see page 238)
- [PRINCE2 Senior Supplier Group](#) (see page 240)

## PRINCE2 Administrator Group

This special group allows the user full access to the PRINCE2 sub-page under project properties in addition to all other global rights on the PRINCE2 Project Manager.

## PRINCE2 Executive/Senior User Group

This access group has the right to approve or reject the various PRINCE2 controls. The group also has access to all the PRINCE2 projects, sub objects, project dashboards, and executive dashboards.

Members of this group are granted the following access rights:

- [PRINCE2 Access Rights for Executive/Senior User Group](#) (see page 225)
- [CA Clarity PPM Access Rights for Executive/Senior User Group](#) (see page 229)

## PRINCE2 Access Rights for Executive/Senior User Group

The following PRINCE2 access rights are included with this group:

### **Product Description – Edit All**

Allows resource to edit all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Product Description – View All**

Allows resource to view all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – Edit All**

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – View All**

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – Edit All**

Allows resource to edit all Exception Report objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – View All**

Allows resource to view all Exception Report objects. This includes the page navigation right.

**Type:** Global

**Lessons Learned – Edit All**

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Lessons Learned – View All**

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – Edit All**

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – View All**

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – Edit All**

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – View All**

Allows resource to view all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – Edit All**

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – View All**

Allows resource to view all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – Edit All**

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – View All**

Allows resource to view all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**Project - Subpage Checkpoint Report - Edit All**

Allows resource to edit all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage Checkpoint Report - View All**

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage End Stage Report - Edit All**

Allows resource to edit all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage End Stage Report - View All**

Allows resource to navigate to all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage Exception Report - Edit All**

Allows resource to edit all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Exception Report - View All**

Allows resource to navigate to all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Highlight Report - Edit All**

Allows resource to edit all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Highlight Report - View All**

Allows resource to navigate to all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Lessons Learned - Edit All**

Allows resource to edit all project objects using secured subpage Lessons Learned.

**Type:** Global

**Project - Subpage Lessons Learned - View All**

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

**Type:** Global

**Project - Subpage PRINCE2™ - Edit All**

Allows resource to edit all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage PRINCE2™ - View All**

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage Product Description - Edit All**

Allows resource to edit all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Product Description - View All**

Allows resource to navigate to all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Project Initiation Document - Edit All**

Allows resource to edit all project objects using secured subpage Project Initiation Document.

**Type:** Global

**Project - Subpage Project Initiation Document - View All**

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

**Type:** Global

**Project - Subpage Stage Plan - Edit All**

Allows resource to edit all project objects using secured subpage Stage Plan.

**Type:** Global

**Project - Subpage Stage Plan - View All**

Allows resource to navigate to all project objects using secured subpage Stage Plan.

**Type:** Global

## CA Clarity PPM Access Rights for Executive/Senior User Group

The following CA Clarity PPM access rights are included with this access group:

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

## PRINCE2 Project Manager Group

This access group is concerned with the direction and performance of investments under their scope. This type of resource can be non-technical. Members of the PRINCE2 Project Manager group monitor, review, and approve portfolios of projects under them. They have create, view, and edit access to PRINCE2 projects, sub objects, and project dashboards. This group does not have access to executive dashboard or portlets and other PRINCE2 management control dashboards.

Members of this group are granted the following access rights:

- [PRINCE2 Access Rights for Project Manager](#) (see page 230)
- [CA Clarity PPM Access Rights for Project Manager](#) (see page 235)

## PRINCE2 Access Rights for Project Manager Group

The following PRINCE2 specific access rights are included with this group:

### **Product Description – Create**

Allows resource to create Product Description objects. This includes the page navigation right.

**Type:** Global

### **Product Description – Edit All**

Allows resource to edit all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Product Description – View All**

Allows resource to view all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – Create**

Allows resource to create Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – Edit All**

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – View All**

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – Create**

Allows resource to create Exception Report objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – Edit All**

Allows resource to edit all Exception Report objects. This includes the page navigation right.

**Type:** Global

**Exception Report – View All**

Allows resource to view all Exception Report objects. This includes the page navigation right.

**Type:** Global

**Lessons Learned – Create**

Allows resource to create Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Lessons Learned – Edit All**

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Lessons Learned – View All**

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – Create**

Allows resource to create Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – Edit All**

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – View All**

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – Create**

Allows resource to create Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – Edit All**

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – View All**

Allows resource to view all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – Create**

Allows resource to create Stage Plan objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – Edit All**

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – View All**

Allows resource to view all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – Create**

Allows resource to create End Stage Report objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – Edit All**

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – View All**

Allows resource to view all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**Project - Subpage Checkpoint Report – Edit All**

Allows resource to edit all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage Checkpoint Report – View All**

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage End Stage Report – Edit All**

Allows resource to edit all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage End Stage Report – View All**

Allows resource to navigate to all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage Exception Report – Edit All**

Allows resource to edit all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Exception Report – View All**

Allows resource to navigate to all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Highlight Report – Edit All**

Allows resource to edit all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Highlight Report – View All**

Allows resource to navigate to all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Lessons Learned – Edit All**

Allows resource to edit all project objects using secured subpage Lessons Learned.

**Type:** Global

**Project - Subpage Lessons Learned – View All**

Allows resource to navigate to all project objects using secured subpage Lessons Learned

**Type:** Global

**Project - Subpage PRINCE2™ – Edit All**

Allows resource to edit all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage PRINCE2™ View All**

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage Product Description - Edit All**

Allows resource to edit all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Product Description - View All**

Allows resource to navigate to all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Project Initiation Document - Edit All**

Allows resource to edit all project objects using secured subpage Project Initiation Document.

**Type:** Global

**Project - Subpage Project Initiation Document - View All**

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

**Type:** Global

**Project - Subpage Stage Plan - Edit All**

Allows resource to edit all project objects using secured subpage Stage Plan.

**Type:** Global

**Project - Subpage Stage Plan - View All**

Allows resource to navigate to all project objects using secured subpage Stage Plan.

**Type:** Global

## CA Clarity PPM Access Rights for Project Managers Group

The following CA Clarity PPM access rights are included with this access group:

### **Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

### **Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

### **Application - Create**

Allows users to create Applications. Includes the Application - Navigate right.

**Type:** Global

### **Application - Navigate**

Allows users to navigate to Application pages. Users need additional rights to view individual Applications.

**Type:** Global

### **Asset - Create**

Allows users to create Assets. Includes the Asset - Navigate right.

**Type:** Global

### **Asset - Navigate**

Allows users to navigate to Asset pages. Users need additional rights to view individual Assets.

**Type:** Global

### **Company - Create**

Allows a resource to view and edit all companies and to create new companies. Resources with this access right cannot view documents unless specific access to the folders or documents is also granted.

**Type:** Global

### **Company - Document Manager - Administrate - All**

Allows resources with access to all documents and forms attached to companies (if other access rights that provide view capability for companies, such as Company - View - All, are also granted). Resources with this access right can do the following:

- Create new form and document folders
- Add documents

- Add forms to folders
- Attach document templates to forms
- Delete forms
- Delete, copy and move documents
- View document properties, history, versions, permissions and workflows

**Type:** Global

#### **Knowledge Store - Access**

Allows resources to create, edit, and view knowledge store documents for which the resource has been given permission.

**Type:** Global

#### **Knowledge Store - Administrate**

Allows resources to administer knowledge store folders and documents for which the resource has been given permission.

**Type:** Global

#### **Other Work - Create**

Allows resources to create other work.

**Type:** Global

#### **Other Work - Navigate**

Allows resources access to the other work management pages.

**Type:** Global

#### **Product - Create**

Allows users to create products. Includes the Product - Navigate right.

**Type:** Global

#### **Product - Navigate**

Allows users to navigate to product pages. Users need additional rights to view individual products.

**Type:** Global

#### **Project - Create**

Allows you to create new projects and define the general properties.

**Includes:** Project - Create from Template right to create a project using a template.

**Type:** Global

**Project - Enable Financial**

Enable financial properties for Projects.

**Requires:**

- *Project - View*
- *Project - View Management or Project - Manager*

Type: Global

**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

**Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** *Reports - Access* right

Type: Global

**Resource - Create**

Allows users to create a resource or role, and edit properties. The right allows users to create labor and nonlabor resources.

**Requires:** Resource - Navigate right

Type: Global

**Resource - Navigate**

Allows users to access resource management pages.

Type: Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

Type: Global

## PRINCE2 Project Support Staff Group

This access group is concerned with monitoring and working on individual tasks and action items. Each member enters time and updates tasks. This type of resource is entitled to view rights to some portlets. Also, the right to conduct peer reviews of the various PRINCE2 controls within their projects.

Members of this group are granted the following access rights:

- [PRINCE2 Access Rights for Project Support Staff](#) (see page 238)
- [CA Clarity PPM Access Rights for Project Support Staff](#) (see page 240)

## PRINCE2 Access Rights for Project Support Staff Group

The following PRINCE2 access rights are included with this group:

### Product Description – View All

Allows resource to view all Product Description objects. This includes the page navigation right.

**Type:** Global

### Project Initiation Document – View All

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### Exception Report – View All

Allows resource to view all Exception Report objects. This includes the page navigation right.

**Type:** Global

### Lessons Learned – View All

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

### Checkpoint Report – View All

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

### Highlight Report – View All

Allows resource to view all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – View All**

Allows resource to view all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – View All**

Allows resource to view all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**Project - Subpage Checkpoint Report - View All**

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage End Stage Report - View All**

Allows resource to navigate to all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage Exception Report - View All**

Allows resource to navigate to all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Highlight Report - View All**

Allows resource to navigate to all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Lessons Learned - View All**

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

**Type:** Global

**Project - Subpage PRINCE2™ - View All**

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage Product Description - View All**

Allows resource to navigate to all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Project Initiation Document - View All**

Allows resource to navigate to all project objects using secured subpage Project Initiation Document

**Type:** Global

**Project - Subpage Stage Plan - View All**

Allows resource to navigate to all project objects using secured subpage Stage Plan.

**Type:** Global

## CA Clarity PPM Access Rights for Project Support Staff Group

The following CA Clarity PPM access rights are included with this access group.

**Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

**Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

**Resource - View - All**

Allows users to view information, except the financial properties of all resources.

**Type:** Global

**Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global

## PRINCE2 Senior Supplier Group

The PRINCE2 Senior Supplier Group members play a more senior supervisory or senior resource role in the project. Each member enters time and updates tasks. This type of resource has view access rights to some portlets and the right to conduct peer review of the various PRINCE2 controls.

Members of this group are granted the following access rights:

- [PRINCE2 Access Rights for Senior Supplier Group](#) (see page 241)
- [CA Clarity PPM Access Rights for Senior Supplier Group](#) (see page 244)

## PRINCE2 Access Rights for Senior Supplier Group

The following PRINCE2 access rights are included with this group:

### **Product Description – Edit All**

Allows resource to edit all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Product Description – View All**

Allows resource to view all Product Description objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – Edit All**

Allows resource to edit all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Project Initiation Document – View All**

Allows resource to view all Project Initiation Document objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – Edit All**

Allows resource to edit all Exception Report objects. This includes the page navigation right.

**Type:** Global

### **Exception Report – View All**

Allows resource to view all Exception Report objects. This includes the page navigation right.

**Type:** Global

### **Lessons Learned – Edit All**

Allows resource to edit all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

### **Lessons Learned – View All**

Allows resource to view all Lessons Learned objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – Edit All**

Allows resource to edit all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Checkpoint Report – View All**

Allows resource to view all Checkpoint Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – Edit All**

Allows resource to edit all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Highlight Report – View All**

Allows resource to view all Highlight Report objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – Edit All**

Allows resource to edit all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**Stage Plan – View All**

Allows resource to view all Stage Plan objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – Edit All**

Allows resource to edit all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**End Stage Report – View All**

Allows resource to view all End Stage Report objects. This includes the page navigation right.

**Type:** Global

**Project - Subpage Checkpoint Report - View All**

Allows resource to navigate to all project objects using secured subpage Checkpoint Report.

**Type:** Global

**Project - Subpage End Stage Report - View All**

Allows resource to navigate to all project objects using secured subpage End Stage Report.

**Type:** Global

**Project - Subpage Exception Report - View All**

Allows resource to navigate to all project objects using secured subpage Exception Report.

**Type:** Global

**Project - Subpage Highlight Report - View All**

Allows resource to navigate to all project objects using secured subpage Highlight Report.

**Type:** Global

**Project - Subpage Lessons Learned - View All**

Allows resource to navigate to all project objects using secured subpage Lessons Learned.

**Type:** Global

**Project - Subpage PRINCE2™ - View All**

Allows resource to navigate to all project objects using secured subpage PRINCE2™.

**Type:** Global

**Project - Subpage Product Description - View All**

Allows resource to navigate to all project objects using secured subpage Product Description.

**Type:** Global

**Project - Subpage Project Initiation Document - View All**

Allows resource to navigate to all project objects using secured subpage Project Initiation Document.

**Type:** Global

**Project - Subpage Stage Plan - View All**

Allows resource to navigate to all project objects using secured subpage Stage Plan.

**Type:** Global

## CA Clarity PPM Access Rights for Senior Supplier Group

The following CA Clarity PPM access rights are included with this access groups:

### **Page - View**

Allows users to view a general page in CA Clarity PPM. For instance pages (such as portfolio pages), this right is not required.

**Type:** Instance

### **Portlet - View**

Allows users to view a specific portlet.

**Type:** Instance

### **Application - Create**

Allows users to create Applications. Includes the Application - Navigate right.

**Type:** Global

### **Application - Navigate**

Allows users to navigate to Application pages. Users need additional rights to view individual Applications.

**Type:** Global

### **Asset - Create**

Allows users to create Assets. Includes the Asset - Navigate right.

**Type:** Global

### **Asset - Navigate**

Allows users to navigate to Asset pages. Users need additional rights to view individual Assets.

**Type:** Global

### **Company - Create**

Allows a resource to view and edit all companies and to create new companies. Resources with this access right cannot view documents unless specific access to the folders or documents is also granted.

**Type:** Global

**Company - Document Manager - Administrate - All**

Allows resources with access to all documents and forms attached to companies (if other access rights that provide view capability for companies, such as Company - View - All, are also granted). Resources with this access right can do the following:

- Create new form and document folders
- Add documents
- Add forms to folders
- Attach document templates to forms
- Delete forms
- Delete, copy and move documents
- View document properties, history, versions, permissions and workflows

**Type:** Global

**Knowledge Store - Access**

Allows resources to create, edit, and view knowledge store documents for which the resource has been given permission.

**Type:** Global

**Knowledge Store - Administrate**

Allows resources to administer knowledge store folders and documents for which the resource has been given permission.

**Type:** Global

**Other Work - Create**

Allows resources to create other work.

**Type:** Global

**Other Work - Navigate**

Allows resources access to the other work management pages.

**Type:** Global

**Product - Create**

Allows users to create products. Includes the Product - Navigate right.

**Type:** Global

**Product - Navigate**

Allows users to navigate to product pages. Users need additional rights to view individual products.

**Type:** Global

#### **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

#### **Reports - View Output - All**

Allows users to view the output of any report.

**Requires:** *Reports - Access* right

**Type:** Global

#### **Resource - Create**

Allows users to create a resource or role, and edit properties. The right allows users to create labor and nonlabor resources.

**Requires:** *Resource - Navigate* right

**Type:** Global

#### **Resource - Navigate**

Allows users to access resource management pages.

**Type:** Global

#### **Timesheets - Navigate**

Allows you to navigate to timesheet pages.

**Type:** Global