

CA Clarity™ PPM

Access Rights Reference Guide

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Chapter 1: Introduction to Access Rights

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.

The following access rights are available in CA Clarity PPM:

- [Auto-Access Rights](#) (see page 15)
- [Basic Group for User Access](#) (see page 19)
- [CA Clarity PPM Access Rights](#) (see page 21)
- [Add-ins Access Rights](#) (see page 107)

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

This section contains the following topics:

[How to Add Instance-Level Access Rights to a Resource](#) (see page 11)

[How to Assign Instance-Level Access Rights to a User Group](#) (see page 11)

[How to Assign Global-Level Access Rights to a User Group](#) (see page 12)

[How to Assign XOG Access Rights to a Resource](#) (see page 13)

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 3: Auto-Access Rights

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 auto-access rights are available in the product:

Application - Manager (Auto)

This right is equivalent to *Application - Edit*, and is automatically granted to an Application Manager.

Type: Application

Asset - Manager (Auto)

This right is equivalent to *Asset - Edit*, and is automatically granted to an Asset Manager.

Type: Asset

Idea - Initiator (Auto)

Automatic right granted to the initiator of an idea.

Type: Idea

Idea - Manager (Auto)

Automatic right granted to the manager of an idea.

Type: Idea

Job Type Creator (Auto)

This right is automatically granted to the creator of a job type when it is created.

Type: Job/Report

Other Work - Manager - Automatic

Automatic right granted to the manager of Other Work; equivalent to *Other Work - Edit*.

Type: Other Work

Page Creator (Auto)

Allows user to edit a page.

Type: Page

Portfolio - Owner (Auto)

Automatic right granted to the owner of a portfolio.

Type: Portfolio

Portfolio - Stakeholder (Auto)

Automatic right granted to a stakeholder of a portfolio.

Type: Portfolio

Portlet Creator (Auto)

Allows user to edit portlet.

Type: Portlet

Product - Manager (Auto)

Allows user to baseline all products. Does not include the Product - Navigate right, and requires the user to have the Product - Edit right.

Type: Product

Project - Discussion Manager (Auto)

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.

Type: Project

Project - Manager (Auto)

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.

Type: Project

Project - Participant (Auto)

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.

Type: Project

Project - Participant Groups (Auto)

Type: 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)

Automatic right granted to the manager of a Release.

Type: Release

Release Plan - Manager (Auto)

Automatic right granted to the manager of a Release Plan.

Type: Release Plan

Report Type Creator (Auto)

This right is automatically granted to the creator of a Report Type when it is created.

Type: Job/Report

Requirement - Manager (Auto)

Automatic right granted to the manager of a Requirement.

Type: Requirement

Resource - Manager (Auto)

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.

Type: Resource

Resource - Self (Auto)

Rights automatically granted to a resource when created. Includes Resource - Edit Ideas.

Type: Resource

Run Report (Auto)

This right is automatically granted to the user who runs a report.

Type: Scheduled Job/Report

Scenario - Creator (Auto)

This right includes Scenario - Edit and Scenario - Edit Access Rights, and is automatically granted to the Scenario creator.

Type: Scenario

Service - Manager Auto

Automatic right granted to the manager of a service.

Type: Service

Chapter 4: Basic User Group Access Rights

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 5: CA Clarity PPM Access Rights

This section contains the following topics:

[Administration Access Rights](#) (see page 22)

[Basics User Access Rights](#) (see page 50)

[Demand Management Access Rights](#) (see page 54)

[Financial Management Access Rights](#) (see page 63)

[IT Service Management Access Rights](#) (see page 67)

[Project Management Access Rights](#) (see page 77)

[Portfolio Management Access Rights](#) (see page 87)

[Resource Management Access Rights](#) (see page 88)

[Studio Access Rights](#) (see page 94)

[XOG Access Rights](#) (see page 99)

Administration Access Rights

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

- [Administration Access Rights](#) (see page 22)
- [Audit Trail Access Rights](#) (see page 23)
- [Department Access Rights](#) (see page 24)
- [Earned Value Definition Access Rights](#) (see page 25)
- [Financial Administration Access Rights](#) (see page 26)
- [Financial Management Access Rights](#) (see page 26)
- [Financial Planning Access Rights](#) (see page 26)
- [Jobs Access Rights](#) (see page 28)
- [License Information Access Rights](#) (see page 30)
- [Location Access Rights](#) (see page 30)
- [Page Access Rights](#) (see page 31)
- [Portfolio Access Rights](#) (see page 32)
- [Portlet Access Rights](#) (see page 32)
- [Process Access Rights](#) (see page 34)
- [Project Access Rights](#) (see page 36)
- [Reports Access Rights](#) (see page 43)
- [Resource Access Rights](#) (see page 44)
- [Scenario Access Rights \(Capacity Planning\)](#) (see page 48)
- [Software Download Access Rights](#) (see page 49)
- [Timesheets Access Rights](#) (see page 49)

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

Financial Departments

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

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

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

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

Financial Locations

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 - AutoStart - All

Allows resource to auto start a new process instance from any of the process definitions in the system.

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 23)
- [Dashboard Access Rights](#) (see page 50)
- [Knowledge Store Access Rights](#) (see page 51)
- [Page Access Rights](#) (see page 31)
- [Reports Access Rights](#) (see page 43)
- [Software Download Access Rights](#) (see page 49)
- [Timesheets Access Rights](#) (see page 49)

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 54)
- [Resource Access Rights for Ideas](#) (see page 57)
- [Financial Access Rights for Ideas](#) (see page 59)
- [Incident Access Rights](#) (see page 60)

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; 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. 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 26)
- [Financial Management Access Rights](#) (see page 26)
- [Financial Planning Access Rights](#) (see page 26)
- [Department Access Rights](#) (see page 24)
- [Location Access Rights](#) (see page 30)

Financial Administration

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

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

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

Financial Departments

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

Financial Locations

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 68)
- [BRM Accelerator Access Rights](#) (see page 70)

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 70)
- [Customer Department Manager Access Rights](#) (see page 72)
- [IT Manager Access Rights](#) (see page 74)
- [Service Manager Access Rights](#) (see page 75)
- [Provider Department Manager Access Rights](#) (see page 76)

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 25)
- [Program Access Rights](#) (see page 78)
- [Project Access Rights](#) (see page 36)
- [Project Hierarchy Access Rights](#) (see page 86)
- [Timesheets Access Rights](#) (see page 49)

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 44)
- [Additional Access Rights for Requisitions](#) (see page 92)
- [Scenario Access Rights \(Capacity Planning\)](#) (see page 48)

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:

- [Basic Studio Access Rights](#) (see page 95)
- [Content Add-ins Access Rights](#) (see page 95)
- [Content Package Access Rights](#) (see page 95)
- [Menu Manager Access Rights](#) (see page 96)
- [Object Access Rights](#) (see page 96)
- [Partition Model Access Rights](#) (see page 97)
- [Portlet Access Rights](#) (see page 32)
- [Portlet Pages Access Rights](#) (see page 98)

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

Content Add-Ins Access Rights

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

Content Add-Ins - Administer

Allows administration of content add-ins.

Type: Global

Content Package Access Rights

The following access right can be used to work with content packages:

Content Package - Administer

Allows user to create, edit, delete, and view content packages.

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

This section contains the following topics:

[EVM Access Rights](#) (see page 107)

[NPD Accelerator Access Rights](#) (see page 114)

[PMBOK Guide Accelerator Access Rights](#) (see page 121)

[PMO Accelerator Access Groups](#) (see page 183)

[PPM Essentials Accelerator Access Rights](#) (see page 216)

[PRINCE2 Access Rights](#) (see page 226)

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.

- [Executive User Group Access Rights](#) (see page 114)
- [Marketing Manager User Group Access Rights](#) (see page 116)
- [Non-Clarity User Group Access Rights](#) (see page 117)
- [Product Portfolio Manager User Group Access Rights](#) (see page 117)
- [Project Portfolio Manager User Group Access Rights](#) (see page 119)
- [Team Member User Group Access Rights](#) (see page 120)

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 121)
- [PBK Executive Group](#) (see page 154)
- [PBK Project Manager Group](#) (see page 161)
- [PBK Team Member Group](#) (see page 179)

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 121)
- [CA Clarity PPM Access Rights for Administrator Group](#) (see page 137)

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 154)
- [CA Clarity PPM Access Rights for Executive Group](#) (see page 158)

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 161)
- [CA Clarity PPM Access Rights for Project Manager Group](#) (see page 171)

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 179)
- [CA Clarity PPM Access Rights for Team Member Group](#) (see page 182)

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 184)
- [PMO Executive Viewer Extended](#) (see page 186)
- [PMO Financial Administrator](#) (see page 190)
- [PMO Idea Creator](#) (see page 191)
- [PMO Idea Reviewer](#) (see page 192)
- [PMO Investment Creator](#) (see page 193)
- [PMO Investment Viewer Extended](#) (see page 194)
- [PMO Portfolio Manager](#) (see page 198)
- [PMO Program Manager](#) (see page 199)
- [PMO Project Creator](#) (see page 201)
- [PMO Project Manager](#) (see page 202)
- [PMO Project Manager Extended](#) (see page 204)
- [PMO Project Viewer](#) (see page 208)
- [PMO Resource Administrator](#) (see page 209)
- [PMO Resource Manager](#) (see page 210)
- [PMO Resource Manager Extended](#) (see page 212)
- [PMO System Administrator](#) (see page 214)
- [PMO Team Member](#) (see page 214)
- [PMO Timesheet Administrator](#) (see page 215)
- [PMO Vendor Management](#) (see page 215)

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 Organizer - Access Reports - Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All Project - Risk, Issue, Change Request - View - All Status Report - View All
	Resource Management	Resource - View - All
Instance (Page - View)	Resource Planning Page and Tabs	Resource Planning Capacity Organizational Demand Top Down Planning Workloads Allocations Unfilled Allocations
	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 Note: This page is a team object action.	Timesheet Review Timesheets Note: 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
		Note: 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
		Note: 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
		Note: 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 My Projects 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 Organizer - Access Reports - Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All Project - Cost Plan - View All Project - Budget Plan - View All Project - Benefit Plan - View All Project - Risk, Issue, Change Request - View - All Status Report - View All
	Resource Management	Resource - View - All Resource - View Book - All Project - View Requisitions - All
Instance (Page - View)	General Tabs	Sponsor PM Alerts Schedule Performance Drill Down Current Issues Drill Down Staffing Outlook Drill Down Project Dashboard Issues and Risks

Type	Area	Access Right
	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 Note: This page is a team object action.	Timesheet Review Timesheets Note: 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 Project KPIs by OBS Project Schedule Planned Cost by Project Type
	PM Alerts Tab Portlets	Overview Project Filter Schedule Performance Schedule Performance Details Milestones Current Issues Current Issues Listing Staffing Staffing Details

Type	Area	Access Right
	Project Dashboard Tab Portlets	Schedule Dashboard Cost and Effort Dashboard Note: 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 Issue Management Note: 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 Role Capacity OBS Resource Aggregation OBS Investment Aggregation Top Down Planning by Investment Resource Workloads Weekly Detail Allocation Discrepancy Unfilled Requirements Booking Status
	Capacity Planning Overview Portlets	Capacity Overview
	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 Pending Estimates Review
	Timesheet Review Page Portlets	Timesheet Review Note: 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 Upcoming Milestones Project Baselines Status Report Indicators Actuals by Transaction Type Team Utilization
	PMO-Project Storyboard Portlets	Team Capacity Issues by Priority Issue Listing Earned Value Analysis by Phase Note: 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 Note: 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 My Projects My Reports
	Other Portlets - PMO Accelerator	Late Tasks and Milestones Project Analysis Project Cycle Time Analysis Project Document Review Project Lifecycle Review Resource Utilization Percentage by Month 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 Organizer - Access Reports - Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All Project - Cost Plan - Edit All Project - Budget Plan - Edit All Project - Budget Plan - Approve All Project - Benefit Plan - Edit All
	Resource Management	Resource - Navigate Resource - View - All Resource - Edit Financial All
	Financial Management	Administration - Access Financial Maintenance - Financial Management Financial Maintenance - Financial Organizational Structure Financial Maintenance - Define Matrix Financial Maintenance - Manage Matrix Financial Process - Transaction Entry Financial Process - Work in Process Financial Process - Approve WIP Adjustments
Instance (Page - View)	Posted Transaction Review Page	Posted Transaction Review Note: Page ID is cop.finTransactionReview
	Posted Transaction Review Page Note: This page is a cost plan detail object action.	Posted Transaction Review Note: Page ID is cop.invTransactionReview
Instance (Portlet - View)	Posted Transaction Review Page Portlet	Posted Transaction Review Note: Portlet ID is cop.finTransactionReview

Type	Area	Access Right
	Posted Transaction Review Page Portlet Note: This page is a cost plan detail object action.	Posted Transaction Review Note: Portlet ID is cop.invTransactionReview
	PMO-Project Status Portlets	Upcoming Milestones Actuals by Transaction Type
	PMO-Project Storyboard Portlets	Note: 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
	Other Portlets - CA Clarity PPM	Action Items My Projects 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 Organizer - Access
	Project Management	Projects - Navigate
	Idea Management	Ideas - Create Idea - Edit Financial Information All Idea - View Financial Information All
	Resource Management	Resource - View - All Resource - Hard Book – All Resource - Soft Book - All
Instance (Portlet - View)	Other Portlets - CA Clarity PPM	Action Items 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
		Organizer - Access
	Project Management	Reports - Access
		Projects - Navigate
	Idea Management	Ideas - Create
		Idea - Edit – All
		Idea - Approve - All
		Idea - Benefit Plan - Edit All
		Idea - Budget Plan - Approve All
		Idea - Budget Plan - Edit All
		Idea - Cost Plan - Edit All
		Idea - Edit Financial Information All
		Idea - Financial Plan - Submit All for Approval
		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
		Project KPIs by OBS
		Project Schedule
		Planned Cost by Project Type
	Other Portlets - CA Clarity PPM	Action Items
		My Projects
		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 Organizer - Access
	Project Management	Projects - Navigate Project - Create Project - Create from Template
	Application Management	Application - Create Application - Edit Financial Information All Application - View Financial Information All
	Asset Management	Asset - Create Asset - Edit Financial Information All Asset - View Financial Information All
	Idea Management	Ideas - Create Idea - Edit Financial Information All Idea - View Financial Information All
	Other Work Management	Other Work - Create Other Work - Edit Financial Information All Other Work - View Financial Information All
	Product Management	Product - Create Product - Edit Financial Information All Product - View Financial Information All
	Service Management	Service - Create Service - Edit Financial Information All Service - View Financial Information All
	Resource Management	Resource - View - All
	Other Portlets - CA Clarity PPM	Action Items 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 Organizer - Access Reports - Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All Project - Cost Plan - View All Project - Budget Plan - View All Project - Benefit Plan - View All Project - Risk, Issue, Change Request - View - All Status Report - View All
	Program Management	Management - Programs
	Application Management	Application - View – All Application - View Financial Information All Application - Cost Plan - View All Application - Budget Plan - View All Application Benefit Plan - View All
	Asset Management	Asset - View – All Asset - View Financial Information All Asset - Cost Plan - View All Asset - Budget Plan - View All Asset Benefit Plan - View All
	Idea Management	Idea - View - All Idea - Benefit Plan - View All Idea - Budget Plan - View All Idea - Cost Plan - View All Idea - View Financial Information All

Type	Area	Access Right
Instance (Page – View)	Other Work Management	Other Work - View – All
		Other Work - View Financial Information All
		Other Work - Cost Plan - View All
		Other Work - Budget Plan - View All
		Other Work Benefit Plan - View All
	Product Management	Product - View – All
		Product - View Financial Information All
		Product - Cost Plan - View All
		Product - Budget Plan - View All
		Product Benefit Plan - View All
	Service Management	Service - View – All
		Service - View Financial Information All
		Service - Cost Plan - View All
		Service - Budget Plan - View All
		Service Benefit Plan - View All
	Resource Management	Resource - View – All
		Resource - View Book - All
		Project - View Requisitions - All
	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

Type	Area	Access Right
Instance (Portlet – View)	Timesheet Review Page and Tab Note: This page is a team object action.	Timesheet Review Timesheets Note: 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 Role Capacity OBS Resource Aggregation OBS Investment Aggregation Top Down Planning by Investment Resource Workloads Weekly Detail Allocation Discrepancy Unfilled Requirements Booking Status
	Capacity Planning Overview Portlets	Capacity Overview
	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 Pending Estimates Review
	Timesheet Review Page Portlets	Timesheet Review Note: 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 Schedule and Progress Resource Utilization

Type	Area	Access Right
	Program Layout Portlets	General Labor Effort Subprojects
	PMO-Project Status Portlets	Project Indicators Upcoming Milestones Project Baselines Status Report Indicators Actuals by Transaction Type Team Utilization
	PMO-Project Storyboard Portlets	Team Capacity Issues by Priority Issues Listing Earned Value Analysis by Phase Note: Upcoming Milestones granted above for the PMO-Project Status Portlets is also required for the PMO-Project Storyboard Portlets.
	Project Default Layout Portlets	Note: General and Labor Effort granted above for the Program Layout Portlets is also required for the Project Default Layout Portlets. 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 My Projects My Reports
	Other Portlets – PMO Accelerator	Late Tasks and Milestones Project Analysis Project Cycle Time Analysis Project Document Review Project Lifecycle Review Resource Utilization Percentage by Month 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 Organizer - Access Reports - Access
	Project Management	Projects - Navigate
	Portfolio Management	Portfolio - Navigate Portfolio – Create
	Resource Management	Resource - View – All
Instance (Page – View)	Portfolio Dashboard Page and Tabs	Portfolio Dashboard Cost and Benefits Roles Cost and Health Goal Analysis Investment Analysis Capital and Operating
Instance (Portlet – View)	Portfolio Dashboard Portlets	Portfolio Dashboard Filter Portfolio Costs Portfolio Cost and Benefit Analysis Portfolio Roles Portfolio Role Analysis Portfolio Cost by Overall Health Portfolio Investment Count by Goal Portfolio Planned Cost by Goal Portfolio Role Demand by Goal Portfolio Planned NPV by Goal Portfolio Investment Count by Type Portfolio Investment Count by Work Status Portfolio Investment Count by Waterline Portfolio Investment Count by Approval Portfolio Capital and Operating Costs Portfolio Capital and Operating Cost Analysis

Type	Area	Access Right
	PMO-Portfolio Investment Dashboard Portlets	Portfolio Investment Dashboard Filter Planned Cost by Waterline Role Demand by Waterline Planned Cost by Goal Role Demand by Goal Investment Cost and Role Demand Investment Schedule Role Capacity and Demand Role Capacity and Demand Histogram Investment Planning by Period Investment Cost by Period Investment Financial Summary Capital and Operating Cost Summary Capital and Operating Budget vs. Forecast
	Other Portlets – CA Clarity PPM	Action Items My Projects 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 Organizer - Access Reports - Access

Type	Area	Access Right
	Project Management	Projects - Navigate Project - Enable Financial Project - Cost Plan - Edit All Project - Budget Plan - Edit All Project - Budget Plan - Approval All Project - Benefit Plan - Edit All Project - Risk, Issue, Change Request - Edit - All Project - Risk, Issue, Change Request - Delete - All Status Report - Create Status Report - Edit All
	Program Management	Management - Programs
	Resource Management	Resource - View – All
Instance (Page – View)	General Tabs	Program Dashboard Program Manager Cost Dashboard Drill Down Project Costs By Phase Project Costs By Task Project Costs By Resource Project Storyboard Drill Down Issues Drill Down Issues and Risks
	Status Report Review Page and Tabs	Status Report Review Status Report Listing Late and Missing Status Reports
Instance (Portlet – View)	Program Dashboard Tab Portlets	Overview Program Filter Program Manager Cost Dashboard Project Costs by Phase Project Costs by Task Project Costs by Resource Program Manager Schedule Dashboard Team Capacity Upcoming Milestones Issues by Priority Issues Listing Earned Value Analysis by Phase

Type	Area	Access Right
	Issues and Risks Tab Portlets	Overview Project Filter Risk Management Issue Management
	Status Report Review Page Portlets	Status Report Review Filter Status Report Listing Late Status Reports Missing Status Reports
	PMO-Program Status Portlets	Cost and Schedule Overview Schedule and Progress Resource Utilization
	Program Layout Portlets	General Labor Effort Subprojects
	Other Portlets – CA Clarity PPM	Action Items My Projects 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 Organizer - Access
	Project Management	Projects – Navigate Project – Create Project – Create from Template Project – Enable Financial
	Resource Management	Resource - View – All
	Other Portlets – CA Clarity PPM	Action Items 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 Organizer – Access Reports – Access
	Project Management	Projects - Navigate Project - Enable Financial Project - Modify Baseline All Project - Risk, Issue, Change Request - Edit - All Project - Risk, Issue, Change Request - Delete - All Status Report - Create Status Report - Edit All
	Resource Management	Resource - View - All Resource - Hard Book All
Instance (Page – View)	General Tabs	Project Dashboard
	Resource Planning Page and Tabs	Resource Planning Capacity Organizational Demand Top Down Planning Workloads Allocations Unfilled Allocations
	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

Type	Area	Access Right
	Timesheet Review Page and Tab Note: This page is a team object action.	Timesheet Review Timesheets Note: 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 Schedule Dashboard Cost and Effort Dashboard
	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 Note: 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 Team Utilization
	PMO-Project Storyboard Portlets	Issues by Priority Issues Listing

Type	Area	Access Right
	Project Default Layout Portlets	General Labor Effort Note: 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 My Projects 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 Organizer – Access Reports – Access
	Project Management	Projects - Navigate Project - Enable Financial Project - Modify Baseline All Project - Schedule In Browser Project - Cost Plan - Edit All Project - Budget Plan - Edit All Project - Budget Plan - Approval All Project - Benefit Plan - Edit All Project - Risk, Issue, Change Request - Edit - All Project - Risk, Issue, Change Request - Delete - All Status Report - Create Status Report - Edit All
	Resource Management	Resource - View - All Resource - Hard Book All Resource - Soft Book All Project - Create/Edit Requisitions - All 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
	Note: This page is a team object action.	Timesheets
		Note: 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
	Note: 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 Schedule Performance Schedule Performance Details Milestones Current Issues Current Issues Listing Staffing Staffing Details
	Project Dashboard Tab Portlets	Schedule Dashboard Cost and Effort Dashboard Note: 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 Issue Management Note: 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 Role Capacity OBS Resource Aggregation OBS Investment Aggregation Top Down Planning by Investment Resource Workloads Weekly Detail Allocation Discrepancy Unfilled Requirements Booking Status
	Capacity Planning Overview Portlets	Capacity Overview
	Status Report Review Page Portlets	Status Report Review Filter Status Report Listing Late Status Reports Missing Status Reports

Type	Area	Access Right
	Timesheet Overview Page Portlets	Timesheet Overview Filter Investment Timesheet Summary Investment Timesheet Review Timesheet Notes Pending Estimates Review
	Timesheet Review Page Portlets	Timesheet Review Note: 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 Upcoming Milestones Project Baselines Status Report Indicators Actuals by Transaction Type Team Utilization
	PMO-Project Storyboard Portlets	Team Capacity Issues by Priority Issues Listing Earned Value Analysis by Phase Note: 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 Note: 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 My Projects My Reports
	Other Portlets – PMO Accelerator	Late Tasks and Milestones Project Cycle Time Analysis Project Document Review Project Lifecycle Review 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 Organizer – Access Reports – Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All Project - Risk, Issue, Change Request - View - All Status Report - View All
	Resource Management	Resource - View - All
Instance (Page – View)	General Tabs	Project Dashboard Issues and Risks
	Status Report Review Page and Tabs	Status Report Review Status Report Listing Late and Missing Status Reports
	PMO-Project Storyboard Page	Issues Drill Down
Instance (Portlet – View)	Project Dashboard Tab Portlets	Overview Project Filter Schedule Dashboard Cost and Effort Dashboard
	Issues and Risks Tab Portlets	Risk Management Issue Management Note: 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 Status Report Listing Late Status Reports Missing Status Reports
	PMO-Project Status Portlets	Status Report Indicators Team Utilization

Type	Area	Access Right
	PMO-Project Storyboard Portlets	Issues by Priority Issues Listing
	Project Default Layout Portlets	General Labor Effort Note: 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 My Projects 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 Organizer – Access Reports – Access
	Resource Management	Resource - Navigate Resource - Create Resource - View - All Resource - Edit - All Resource - Edit Financial All Resource - Update Skills - All

Type	Area	Access Right
Instance (Page – View)	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
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 Booking Status
	Capacity Planning Overview Portlets	Capacity Overview
	Other Portlets – CA Clarity PPM	Action Items
		My Projects 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 Project - View Management - All Project - View Financial - All
	Resource Management	Resource - View - All Resource - Hard Book All Resource - Soft Book All
Instance (Page – View)	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
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 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 Labor Effort Note: 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 My Projects 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 Organizer – Access Reports – Access
	Project Management	Projects - Navigate Project - View Management - All Project - View Financial - All
	Resource Management	Resource - View - All Resource - Hard Book All Resource - Soft Book All Resource - Update Skills - All Project - Create/Edit Requisitions - All Project - Attach Requisitions Entry Resources - All Project - View Requisitions - All
Instance (Page – View)	Resource Planning Page and Tabs	Resource Planning Capacity Organizational Demand Top Down Planning Workloads Allocations Unfilled Allocations Bookings
	Capacity Planning Overview Page	Capacity Planning Overview

Type	Area	Access Right
	Timesheet Overview Page	Timesheet Overview Timesheet Details Timesheet Notes
	Timesheet Review Page and Tab Note: This page is a team object action.	Timesheet Review Timesheets Note: 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 Role Capacity OBS Resource Aggregation OBS Investment Aggregation Top Down Planning by Investment Resource Workloads Weekly Detail Allocation Discrepancy Unfilled Requirements Booking Status
	Capacity Planning Overview Portlets	Capacity Overview
	Timesheet Overview Page Portlets	Timesheet Overview Filter Investment Timesheet Summary Investment Timesheet Review Timesheet Notes
	Timesheet Review Page Portlets	Timesheet Review Note: 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 Labor Effort Note: 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 My Projects 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 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 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 Organizer – Access Reports – Access
	Resource Management	Resource - View – All
	Timesheet Management	Timesheet Navigate Timesheet - Edit All Timesheet - Approval All
Instance(Portlet – View)	Other Portlets – CA Clarity PPM	Action Items My Projects 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 Organizer – Access Reports – Access
	Project Management	Projects – Navigate
Instance (Portlet – View)	Other Portlets – CA Clarity PPM	Action Items My Projects 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 216)
- [PPM Essentials Accelerator Group Access Rights](#) (see page 217)

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 217)
- [PPM Essentials Executive Group Access Rights](#) (see page 218)
- [PPM Essentials Idea Requestor Group Access Rights](#) (see page 220)
- [PPM Essentials Project Manager Group Access Rights](#) (see page 221)
- [PPM Essentials Resource Manager Group Access Rights](#) (see page 223)
- [PPM Essentials Team Member Group Access Rights](#) (see page 225)

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 226)
- [PRINCE2 Executive/Senior User Group](#) (see page 227)
- [PRINCE2 Project Manager Group](#) (see page 231)
- [PRINCE2 Project Support Staff Group](#) (see page 240)
- [PRINCE2 Senior Supplier Group](#) (see page 242)

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 227)
- [CA Clarity PPM Access Rights for Executive/Senior User Group](#) (see page 231)

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 232)
- [CA Clarity PPM Access Rights for Project Manager](#) (see page 237)

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 240)
- [CA Clarity PPM Access Rights for Project Support Staff](#) (see page 242)

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 243)
- [CA Clarity PPM Access Rights for Senior Supplier Group](#) (see page 246)

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