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Chapter 1: PMBOK Guide Accelerator

This section contains the following topics:

- PMBOK Guide Accelerator Overview (see page 9)
- Access Groups (see page 9)
- Project Templates (see page 10)
- Project Tasks (see page 11)
- Phases (see page 12)
- Document Review and Approval Processes (see page 13)
- PMBOK Guide Document Components (see page 15)

**PMBOK Guide Accelerator Overview**

The CA Clarity PPM Accelerator for the PMBOK Guide (PMBOK Guide Accelerator) is an add-in that consists of a set of dashboards, portlets, project templates, document templates, processes, and access rights. Use your organization project management knowledge and practices to help you structure your project and define the information needed throughout your project lifecycle.

This add-in provides a starting point from which you can configure CA Clarity PPM to support your PMBOK Guide best practice project management activities. Use this accelerator as is, or let your CA Clarity PPM administrator set up your system to reflect the interpretation and implementation of the PMBOK Guide project management best practices.

The PMBOK Guide is highly descriptive not prescriptive. No requirements stipulate to use certain project management practices. The PMBOK Guide provides you with guidelines that are based on industry best practices. Thus, what is valid for your organization cannot be valid for another. Use the PMBOK Guide best practices that best meet your organization needs. They are generally accepted best practices by project managers in certain global regions.

Visit the PMI website, PMI.org, for more information about A Guide to the Project Management Body of Knowledge (PMBOK Guide).

**Access Groups**

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 content included with this add-in is designed for these access groups.
The following describes the access groups:

- **PBK Project Manager.** 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.

- **PBK Executive.** 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.

- **PBK Team Member.** 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.

- **PBK Administrator.** 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.

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**Project Templates**

The PMBOK Guide Accelerator includes project templates exclusive to this add-in. Creating new PMBOK Guide projects also requires creating them from one of the PMBOK Guide project templates, or from a project template created from a PMBOK Guide project template. This ensures that your new projects can use the PMBOK Guide Accelerator features.

The project templates are ready to use; no further set up is necessary. However, configure and duplicate them to create new project templates for each of your organization project types.

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

The following project templates are included:

**PMBOK® Guide Project Template**

When you create a project from this template, the project includes:

- The PMBOK Guide documents, which are based on templates from *The PMI® Compendium of Project Management Practices*, and related processes

- The PMBOK guide layout page

- PMBOK Guide portlets that display on the project dashboard page
**PMBOK® Guide Project Planning Checklist Template**

This project template includes the same features as the PMBOK® Guide Project Template. Also includes a high level list of project key tasks. The project manager can use these tasks to manage project execution or to do project planning.

**Project Tasks**

PMBOK Guide project key tasks are included with the project you create new from the PMBOK® Guide Project Planning Checklist Template project template, or from project templates based on the template. These tasks display in the project task list and in the project checklist portlet on the dashboard. These tasks match the project planning checklist in The PMI® Compendium of Project Management Practices.

Use the project tasks as is, or edit them to match the types used by project managers. For example, project managers can edit the project template with tasks that have time and resources associated with them. Project managers can add, remove, and reorder tasks.

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

The following key tasks are included:

- Goals and objectives
- Scope
- Major deliverables
- WBS
- Top-down planning estimates
- Major milestones
- Master integrated schedule
- Product and services requirements
- Phase Plan
- Organization Plan
- Performance, evaluation and test plan
- Change Control Plan
- Problem Tracking Plan
- Documentation Plan
- Education Plan
- Communication Plan
- Legal and Regulatory Requirements Plan
- Risk Assessment
- Risk Management Plan
- Reliability, Availability, and Usability Plan
- Preliminary Support Plan
- Interdependencies Plan
- Resources Plan
- Project Plan
- Opportunity Costs
- Budget
- Financial Analysis
- Integrated Business and Realization Plan
- Functional Deliverables
- Top-level Architecture Specification Plan
- High-Level Functional Specifications
- Bottom-up Task Estimates by functional groups
- Detailed Functional Planning and Schedules
- Functional Schedule Critical Path Analysis
- Master Schedule Critical Path Analysis
- Functional Coach Approval and Commitment
- Master Schedule and Plan
- Planning Phase Checklist

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

**Phases**

Project managers use the project phase to reflect the current phase of the project. Select the project phase using the Phase field that displays on the project properties page. Your CA Clarity PPM administrator can define different sets of phases for different project types.
Document Review and Approval Processes

See the *Studio Developer’s Guide* for more information.

The following phases are included with the Standard phase type:

- Requirements
- Design
- Build
- Test
- Launch

*See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.*

**Document Review and Approval Processes**

Actions such as submitting a document for review from PMBOK Guide documents, trigger processes that move the document through a review or approval cycle.

Use the processes as is, or let your CA Clarity PPM administrator configure them to match the review and approval cycle. Also, view a diagram of the process flow on the process flow diagram page of process definition.

See the *Administration Guide* for more information.

The following review-type processes are included:

- Change Request Review
- Lessons Learned Review
- Project Closure Review
- Project Report Review
- Project Scope Statement Review

The following approval-type processes are included:

- Product Description Approval
- Project Charter Approval
How to Work with the Document Review Process

Create a topic for each of the exercise and work within the topic. The document review process pertains to the lessons learned, project scope statement, project report, and project closure documents, all of which go through a similar workflow.

The following tasks are involved in the review of the documents in the management of a typical PMBOK Guide project:

1. **The project manager defines the resources who review and approve the documents that require a review.** (see page 19)
2. **The project manager creates and saves the document.** (see page 18)
3. **The project manager submits the document for review.** (see page 34) The review process is initiated.
4. **The reviewer receives an action item to review the document and completes their review.** (see page 35) Once all reviewers assigned to the project complete their review of the document, the status of the document changes to "Reviewed". The review process ends.

How to Work with the Document Approval Process

The document approval process pertains to the product description and project charter documents, both of which go through a similar workflow.

The following are the approval tasks for the documents related to the management of a typical PMBOK Guide project:

1. **The project manager defines the resources who review and approve the documents that require a review and approval.** (see page 19)
2. **The project manager creates and saves the document.** (see page 18)
3. **The project manager submits the document for approval.** (see page 34) The document is locked from further updates and the approval process is initiated.
4. The reviewer does one of the following:
   - **Approves the document.** (see page 35) The status of the action item changes to "Approved", and the document Approval Status is set to "Approved".
   - **Rejects the document.** (see page 35) The status of the action item changes to "Rejected", and the document Approval Status is set to "Rejected".

**Note:** If reviewers reject the document, the status of the action item changes to "Rejected" even if other reviewers approve the document, or leave the document status as "Open".

Once all reviewers assigned to the project complete their review of the document and approve the document, the process changes the status of the document to "Approved". The review process ends.
How to Work with the Change Request Review Process

The Change Request Review process pertains to the project plan updates included in change requests. The following tasks are involved in the review of project plan updates, which are part of the management of a typical PMBOK Guide project:

1. The project manager defines the resources who review the project plan updates included in change requests. (see page 19)
2. The project manager creates and submits the project plan update. (see page 31)
   The process is initiated.
3. The change control board member receives an email notification from the project manager to review the document (see page 32). The review process ends.

PMBOK Guide Document Components

PMBOK Guide documents consist of the following components. The CA Clarity PPM administrator controls the access to the components to grant the CA Clarity PPM access rights.

Reports

You can export report data to a Microsoft Excel spreadsheet so that you can perform statistical operations, such as SUM and AVERAGE. To export your results to Excel, open the report, and select Export to Excel.

See the CA Clarity Basics User Guide for more information.

Actions Menu and Edit Mode

You can edit some of the document data directly from the list page for that document type. For example, for project scope statement documents not yet submitted for review, edit the scope statement name, and review completed date directly from the list page.

To edit the fields on list pages, click Edit.

See the Personalizing CA Clarity User Guide for more information.

Processes

You can view initiated processes, or create new ones using the Processes page. For example, create a process that notifies the managers when the status of a document changes to "Approved." You can also define a process to take an action, such as changing the project progress to "Completed."

See the Administration Guide for more information.
Audit Trail

Audit Trail keeps a historical record of all changes, additions, and deletions that occurs to specified document fields. Use the page to view a log of change, addition, or deletion records for any of the fields for auditing.

Audit Trail appears if your CA Clarity PPM administrator has set it up and if you have the appropriate access rights. The CA Clarity PPM administrator also determines the fields to audit and the information stored in the audit trail.

See the Administration Guide for more information.

See the Personalizing CA Clarity User Guide for more information.
Chapter 2: Projects

This section contains the following topics:

- View List of Projects (see page 17)
- How to Start PMBOK Guide Projects (see page 17)
- Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects (see page 21)
- Revert PMBOK Guide Projects to Standard CA Clarity PPM Projects (see page 22)
- Dashboard (see page 22)
- How to Work with Project Plan Updates (see page 30)

View List of Projects

View a list of projects using the project list page, or from the detailed management views.

To view a list of projects, open the Portfolio Management menu, and click Projects.

You can roll up PMBOK Guide projects into other programs and portfolios like you can with standard CA Clarity PPM projects. The data from the projects display in various portfolio and program dashboards and dashboard layouts. The data is also included in management views and reports.

See the Project Management User Guide for more information.

How to Start PMBOK Guide Projects

Use the following process to start PMBOK Guide projects:

1. Do one of the following:
   - Create a new project from a PMBOK Guide project template (see page 18).
   - Convert an existing CA Clarity PPM project to a PMBOK Guide project (see page 21).

2. Define the PMBOK Guide project properties. (see page 19)

3. As your project progresses, create the PMBOK Guide documents. (see page 18)

4. View PMBOK Guide project data in management views. (see page 73)

5. Export the data to Microsoft Excel or run a report.
   See the CA Clarity Basics User Guide for more information.
Create Projects from PMBOK Guide Project Templates

For your project to include PMBOK Guide features, the project requires being a PMBOK Guide project. Use the following procedure to create a new PMBOK Guide project from a PMBOK Guide project template.

Follow these steps:
1. Open the Portfolio Management menu, and click Projects.
   The list page appears.
2. Click New from Template.
   The select project template page appears.
3. Select a PMBOK Guide project template, and click Next.
   The create page appears.
4. Complete the following fields in the General section:
   - **Project Name**
     Defines the unique name for the project.
     **Limits:** 80 characters
     **Required:** Yes
   - **Project ID**
     Defines the unique identifier for the project. On lists and portlets, the value for the field is display only.
     **Limits:** 20 characters
     **Required:** Yes
   - **Page Layout**
     Specifies the page layout to view project or program data.
     **Values:**
     - Program Layout. Use the layout to view budget data on the project dashboard page.
     - Project Default Layout. Use the layout to view the default labor and team utilization charts on the project dashboard page.
     - Program Status Dashboard. Use the layout to view PMO program-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the *PMO Accelerator* for more information.
- Project Status Dashboard. Use this layout to view PMO project-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in. See the PMO Accelerator for more information.

- PMBOK® Guide Layout. Use this layout to display the PMBOK Guide-specific data on the project dashboard page.

  Default: PMBOK® Guide Layout

5. In the Organizational Breakdown Structure section, click the Browse icon next to the OBS to associate with the project for security, organizational, or reporting purposes. The Department OBS is used to associate the project with a department. It is listed last if multiple OBS exist. See the CA Clarity Basics User Guide for more information.

6. Complete the following fields in the Copy Template Project Options section, and save:

   Template Name
   Displays the name of the template associated with the project.

   Scale Work By
   Defines the percentage to scale the work for the project.

     Default: 0%

   Scale Budget By
   Defines the percentage to scale the budget for the project.

     Default: 0%

   Convert resources to roles
   Specifies to convert resources to roles for the project.

     Default: Cleared

The PMBOK Guide project is created.

**Define PMBOK Guide Accelerator-Specific Project Properties**

Use the PMBOK Guide Accelerator-specific fields on the project properties page to define the project. Specify the portlets and data to display on the project dashboard page, define the phase, identify the resources to review the documents, and update project plan in change request for review and approval.
Follow these steps:

1. Open the project.
   The project properties page appears.

2. Define the following field in the General section:
   **Page Layout**
   Specifies the page layout to view project or program data.
   **Values:**
   - Program Layout. Use the layout to view budget data on the project dashboard page.
   - Project Default Layout. Use the layout to view the default labor and team utilization charts on the project dashboard page.
   - Program Status Dashboard. Use the layout to view PMO program-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the *PMO Accelerator* for more information.
   - Project Status Dashboard. Use this layout to view PMO project-specific data on the project dashboard page. This layout is only available if you have installed the PMO Accelerator add-in.
     See the *PMO Accelerator* for more information.
   - PMBOK® Guide Layout. Use this layout to display the PMBOK Guide-specific data on the project dashboard page.
     **Default:** PMBOK® Guide Layout
   **Phase**
   The phase for this project. This metric is used in portfolio management analysis.
   **Values:**
   - New Product Development
   - Six Sigma (DMADV)
   - Design for Six Sigma (IDOV)
   - Six Sigma
   - Standard. Choose from the following phases: Requirements, Design, Build, Test, and Launch.
     **Default:** Requirements

3. Complete the following fields in the Reviewers section, and save:
Reviewers

Specifies the names of the resources responsible for reviewing and/or approving the project PMBOK Guide documents.

**Note:** Define at least one resource as a reviewer. Otherwise, action items are not sent during the review or approval process. You can later define a reviewer to trigger the process to send an action item.

Change Control Board

Specifies the names of the resources who are members of the change control board. The resources are responsible for reviewing and approving project plan updates included in change requests.

**Convert Standard CA Clarity PPM Projects to PMBOK Guide Projects**

Use the following procedure to convert standard CA Clarity PPM projects to PMBOK Guide projects.

**Follow these steps:**

1. Open the Project Conversion menu, and click Project Conversion.
   
   The project conversion page appears.

2. Click New.
   
   The create project conversion page appears.

3. Complete the following fields, and save:

**Conversion Type**

Specifies the type of conversion. Select Non-PMBOK to PMBOK.

**Values:**

- PMBOK Guide to Non-PMBOK Guide. Converts a PMBOK Guide project to a standard CA Clarity PPM project.

- Non-PMBOK Guide to PMBOK Guide. Converts a standard CA Clarity PPM project to a PMBOK Guide project.

**Projects**

Defines the names of the projects to convert. Click the Browse icon, select the check box next to each project, and click Add.

The specified projects are converted to PMBOK Guide projects.
Revert PMBOK Guide Projects to Standard CA Clarity PPM Projects

Use this procedure to convert projects created from PMBOK Guide project templates to standard CA Clarity PPM projects.

Follow these steps:
1. Open the Project Conversion menu, and click Project Conversion.
   The project conversion page appears.
2. Click New.
   The create project conversion page appears.
3. Complete the following fields, and save:
   - **Conversion Type**
     Specifies the type of conversion. Select PMBOK Guide to Non-PMBOK Guide.
     - Values:
       - PMBOK Guide to Non-PMBOK Guide. Converts a PMBOK Guide project to a standard CA Clarity PPM project.
       - Non-PMBOK Guide to PMBOK Guide. Converts a standard CA Clarity PPM project to a PMBOK Guide project.
   - **Projects**
     Defines the names of the projects to convert. Click the Browse icon, select the check box next to each project, and click Add.
     The specified projects are converted to standard CA Clarity PPM projects.

Dashboard

Use the project dashboard page to get project status information including PMBOK Guide fields and statuses. This page contains the overall picture and the performance of the PMBOK Guide project in portlets.

**Important!** Select the layout for the PMBOK® Guide Layout page for the portlets to display.

The following portlets are included:
- **Project Status** (see page 23). The portlet displays information similar to that on the project status page. The portlet contains metrics and status information for the PMBOK Guide project open.
Dashboard

Chapter 2: Projects

- **PMO Dashboard.** If the PMO Accelerator is installed, the portlet displays a link to access the PMO Dashboard.

- **Project by Variance and Performance** (see page 87). The portlet displays information similar to that on the project variance and performance page of the executive dashboard. But contains at the task level with metrics and status information for the PMBOK Guide project open.

- **Project Checklist** (see page 27). The portlet displays a list of the key tasks. Includes such details as the task name, start, and end date, the resource assigned to the task, the status, the percent completed, and any comments.

- **Project Document Review Status** (see page 29). The portlet displays a list of your most recent project report documents submitted for review and review status updates.

**Access the Dashboard**

Before you can access and view PMBOK Guide Accelerator-specific portlets and data on the project dashboard, select the PMBOK® Guide Layout page layout. The Page Layout field is a field that displays in the General section of the project properties page.

**Follow these steps:**

1. Open the project.
   
   The properties page appears.

2. Click Dashboard.
   
   The project dashboard page appears.

**Project Status Portlet**

Use the Project Status portlet on the project dashboard page to view metrics and status information for the PMBOK Guide project.

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

This portlet contains the following columns:

- **Project Phase**

  The phase for this project. This metric is used in portfolio management analysis.

  **Values for Standard Phase Type:** Requirements, Design, Build, Test, and Launch
Dashboard

Start
Defines the date of starting the project. The value for the field is based on the Start Date the schedule page of project properties.

End
Defines the date of completing the project. The value for the field is based on the schedule page of project properties page.

Days Late Status
Displays a stoplight to represent the number of days the project is late, which value is based on the Days Late field on the project dashboard page.

Stoplight:
- Grey. The project schedule data is undefined.
- Green. The project is on schedule.
- Yellow. The project is late by \( \leq 2 \) Days.
- Red. The project is late by \( > 2 \) Days.

Days Late
Displays the number of days the project or the key task is late, based on the following formula:

\[
\text{Days Late} = \text{Current Due Date} - \text{Baseline Due Date}
\]

Risk Status
Displays a stoplight to represent the project status level with risks. The value for the field is based on the highest probability of open risks entered on the risks page.

Stoplights:
- Grey. The project has no risk data.
- Green. All of the project risks are of low priority.
- Yellow. The project has at least one risk of medium priority and no high priority risks.
- Red. The project has at least one risk of high priority.

Issue Status
Displays the project status level with issues in the form of a stoplight to represent the status. The value for this field is based on the Status field on the issue properties page.

Default: Open
Stoplights:
- Grey. The project has no issue data.
- Green. All of the project issues are of low priority.
- Yellow. At least one of the project issues is of medium priority and no high priority issues exist for the project.
- Red. At least one of the project issues is of high priority.

Change Requests Status
Displays a check mark if at least one change request is logged for the project. You can mouse over the check mark to display the number of change requests created in the rollover text.

Project Outlook
Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

Values:
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

Stoplights:
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

View PMO Dashboard
If you have the PMO Accelerator installed, you can use the Click here to view PMO Dashboard link that appears in the PMO Dashboard portlet to view the project dashboard page. This page displays the portlets for the PMO project storyboard page layout. The Page Layout field appears on the project properties page. When you click the link, the Project Dashboard opens in a separate browser window.

Note: If the PMO Accelerator is not installed, a message prompts you to contact the system administrator.

Access rights are required to the portlets on the Dashboard for the data to display.

See the PMO Accelerator Product Guide for more information.
Project by Variance and Performance Portlet

You can evaluate a project in terms of schedule and budgeted cost variance on the phase or task level using the Project by Variance and Performance portlet that displays on the Project Dashboard page. This portlet displays a list of the key tasks and details such as the planned value, actual cost, earned value, planned finish date, and percent complete.

You can view project-specific task data from the following columns on this portlet:

**Task**
Displays the task name. Use the task name link to open the task.

**Start**
Displays the date for starting the task. The value for the field is derived from the Start field on the task properties page.

**End**
Displays the date for completing the task. The value for this field is derived from the Finish field on the task properties page.

**Days Late**
Displays the number of days the project or the key task is late, based on the following formula:

\[
\text{Days Late} = \text{Current Due Date} - \text{Baseline Due Date}
\]

**% Complete**
Displays the percent of work completed for partially completed tasks. The value for this field is from the % Complete field on the task properties page.

**Actual Cost**
Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

**Planned Value**
Displays the planned value (PV) is a system-calculated value representing the Budgeted Cost of Scheduled Work (BCWS). PV is the authorized budget assigned to the project work not started, or a work breakdown structure component. The total planned value for the project is also known as Budget At Completion (BAC).

PV is calculated based on the following formula:

\[
\text{Planned Value (PV)} = \text{Sum of BAC through a point in time}
\]
Earned Value

Displays the earned value (EV) is system-calculated and represents the Budgeted Cost of Work Performed (BCWP). EV is the value indicated in the approved budget for project work performed, or work breakdown structure component.

EV is calculated using the following formula:
Earned Value (EV) = Budget At Completion (BAC) for a task x % Complete

Cost Variance

Displays the cost variance (CV), which is the value of work accomplished as against the amount spent to date.

CV is calculated using the following formula:
Cost Variance (CV) = Earned Value (EV) - Actual Cost (AC)

Project Checklist Portlet

Use the project checklist portlet on the project dashboard page to view the status of the selected project tasks as a checklist.

The following fields display on the portlet:

Checklist Item/Resource

Displays the task name. When you assign resources to the task, you can expand the list to view their names.

Start

Displays the date for starting the task. The value for the field is derived from the Start field on the task properties page.

End

Displays the date for completing the task. The value for this field is derived from the Finish field on the task properties page.

Status

Displays the status of the task.

Values:

- Completed. Indicates that the ETC task is zero and the percentage completed is 100.
- Not Started. Indicates that actuals are not posted.
- Started. Displays when a resource posts actuals to the task assignment.

Default: Not Started
% Complete
Displays the percentage of work completed for partially completed tasks. The value for the field is derived from the % Complete field on the task properties page.

Comments
Defines the comments related to the task. When the Project Checklist field is selected and the task is saved, the comments in the field are displayed with the task in the Project Checklist portlet on the dashboard.

Limits: 80 characters

View Project Task Status Information in the Project Checklist
You can use the project checklist portlet that displays on the project dashboard page to view task-related data, such as status information.

Follow these steps:
1. Open the project to view project task information.
   The project properties page appears.
2. Click Dashboard.
   The project dashboard page appears.

Include Project Tasks in the Project Checklist
Projects created using the PMBOK® Guide Project Planning Checklist Template project template include project tasks that are, by default, displayed in the project checklist. The project checklist in the Project Checklist portlet is displayed on the project dashboard page.

If the project tasks have the Project Checklist field selected, specifies the task as a project checklist item. The Project Checklist field displays on the task properties page.

New tasks you create from PMBOK Guide projects are not included in the project checklist by default. Use the following procedure to include them in the checklist.

See the Project Management User Guide for more information.

Follow these steps:
1. Open the project and the task.
   The properties page appears.
2. Complete the following fields, and save:

**Project Checklist**

Specifies to include the task in the Project Checklist portlet. The portlet displays on the project dashboard page. When selected, the task is included in the list.

*Default:* Cleared

**Comments**

Defines the comments related to the task. When the Project Checklist field is selected and the task is saved, the comments in the field are displayed with the task in the Project Checklist portlet on the dashboard.

*Limits:* 80 characters

The task is included in the project checklist.

**Copy Key Tasks to Projects**

You can copy the tasks from the PMBOK® Guide Project Planning Checklist Template project template to a project that does not already have them.

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

**Project Document Review Status Portlet**

Use the Project Document Review Status portlet that displays on the project dashboard page to receive quick status updates on the latest documents submitted for review or approval. The portlet provides the latest data of each document type submitted, the document current review or approval status, and the names of any pending reviewers.

The following fields display on the portlet:

**Documents**

Displays the name of the latest document submitted. Click a document name to open the properties page for the latest document submitted.

**Document Type**

Displays the document type for the latest document submitted.

**Review Status**

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
How to Work with Project Plan Updates

Project plan updates are updates to the project plan or the supporting details. Project plan updates reflect the change requests that the change control board reviews and approves.

See the Project Management User Guide for more information.

Use the following process to work with project plan updates:

1. The project manager updates the project plan or supporting details.
2. The project manager creates a change request.
3. The project manager creates and submits the project plan update. (see page 31) An email notification is sent from the project manager to the change control board members.
4. The change control board reviews the project plan update details. (see page 32)
**Note:** Ensure that the project manager is notified that the email notification was successfully sent by adding the project manager as a change control board member. Let your CA Clarity PPM administrator configure the Change Request Review process to send email notifications to the project manager.

## Create and Submit Project Plan Updates

When you submit a project plan update for review, the Change Request Review process starts. This process sends an email notification from the project manager to the change control board members to review the document. Once the email notification is sent, the Notify Change Control Board field on the project plan update page of change request properties is cleared. This allows the project manager to create and send further project plan updates.

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

**Follow these steps:**

1. Open the project.
   - The properties page appears.
   - The risks/issues/changes page appears.
3. Click Change Requests.
   - The change requests page appears.
4. Open the change request.
   - **Note:** If the change request to create a project plan is not already created and displayed in the list, create and save the change request.
   - The change request properties page appears.
5. Open the Properties menu and click Project Plan Update.
   - The project plan update page appears.
6. Define the following fields:

   **Project Plan Change(s)**
   - Specifies the areas in the project affected by the change.

   **Notify Change Control Board**
   - Specifies to send an email notification to the change control board members about modifications to the project. Select the check box to specify sending the email notification.
   - **Default:** Cleared
How to Work with Project Plan Updates

Project Plan Update Description

Defines the modifications that have been made to the project plan. The text you enter here is used as the body of the email.

Limit: 2000 characters

7. Save the changes.

The project plan update email notification is sent from the project manager to each member of the change control board.

Review Project Plan Updates from Email Notifications

The resources identified as members of the change control board for the project receive email notifications from the project manager each time the project manager submits a project plan update. The project manager can change the resources who are identified as change control board members by editing the names listed in the Change Control Board field on the project properties page.

Use this email to review a summary of the changes. You can create comments and requests for clarification, if necessary.

Important! Make sure that the project manager and the resources identified as change control board members enter valid email addresses in CA Clarity PPM to send and receive email notifications successfully.
Chapter 3: Documents

This section contains the following topics:

- How to Work with PMBOK Guide Documents (see page 33)
- Product Description Documents (see page 36)
- Project Charter Documents (see page 40)
- Project Scope Statement Documents (see page 45)
- Scope Management Plan Documents (see page 48)
- Quality Management Plan Documents (see page 51)
- Risk Identification - SWOT Analysis Documents (see page 54)
- Project Report Documents (see page 56)
- Lessons Learned Documents (see page 63)
- Project Closure Documents (see page 67)

How to Work with PMBOK Guide Documents

The following process details how to work with PMBOK guide documents:

1. The project manager creates one of the following documents:
   - Product Description (see page 36)
   - Project Charter (see page 40)
   - Project Scope Statement (see page 45)
   - Scope Management Plan (see page 48)
   - Quality Management Plan (see page 51)
   - Risk Identification - SWOT Analysis (see page 54)
   - Project Report (see page 56)
   - Lessons Learned (see page 63)
   - Project Closure (see page 67)

2. The project manager edits access to the documents. (see page 34)

3. If necessary, the project manager edits the document:
   - Product Description (see page 39)
   - Project Charter (see page 44)
   - Scope Management Plan (see page 51)
   - Project Scope Statement (see page 47)
How to Work with PMBOK Guide Documents

- **Quality Management Plan** (see page 53)
- **Risk Identification - SWOT Analysis** (see page 55)
- **Project Report** (see page 61)
- **Lessons Learned** (see page 66)
- **Project Closure** (see page 69)

4. Depending on the type of document, the project manager submits the document for review or approval (see page 34). An action item is sent to the reviewer.

5. Depending on the type of document, the reviewer does one of the following:
   - Reviews the document. (see page 35)
   - Approves or rejects the document. (see page 35)

Manage Access to PMBOK Guide Documents

You can manage access to the PMBOK Guide documents using the links in the Access to this Object displayed when the document is open. Use the links to view, grant, and edit access rights to your document.

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

Submit Documents for Review

Not all documents require approval, but they all require review. When you submit a document for review, the document approval or document review process starts. The reviewer is sent an action item to review and/or approve the document. The process that is triggered to start is dependent on the type of document you are submitting for review.

**Note:** The scope management plan, quality management plan, and risk identification - SWOT analysis documents cannot be submitted for review.

The project manager can change the resources identified as reviewers by editing the names listed in the Reviewers field on the project properties page.

Once you submit your document for review, all the document fields become display-only.

**Follow these steps:**

1. Open the project.
   - The properties page appears.
2. Open the document to submit for review.
   The properties page for that document appears.

3. Select the check box for the Submit for Review field that displays in the General section of the page, and submit.
   The document is submitted for review.

**Review Documents from Action Items**

Project managers are responsible for creating PMBOK Guide documents and for submitting them for review. PMBOK reviewers receive action items to review the submitted documents in their Organizer. The reviewer reviews the document and marks completion with the "Reviewed" status.

See the *CA Clarity Basics User Guide* for more information.

**Follow these steps:**

1. Open the Personal menu and click Organizer.
   The organizer action items page appears by default.

2. Locate the action item, choose a status from the Status field for the action item, and save.
   **Values:** Reviewed, Not Reviewed
   **Default:** Not Reviewed

**Review and Approve Documents from Action Items**

Project managers are responsible for creating PMBOK documents, providing product descriptions and project charters, and submitting for approval. The resource, assigned as the reviewer of product description documents, receive an action item in their Organizer when the project manager submits the document for approval. The reviewer reviews the document and completes the action item marking the status as "Approved" or "Rejected".

**Follow these steps:**

1. Open the Personal menu and click Organizer.
   The organizer action items page appears by default.
2. Locate the action item, review the document, select a status from the Status field for the action item, and save.

Values: Approved, Rejected, Open
Default: Open
The status of the action item is saved.

Product Description Documents

The product description document records the description of the product or service related to the project.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Product Description Documents

Once you save the document, many of the fields in the General section of the properties page become visible, some of which are display only.

Follow these steps:
1. Open the PMBOK Guide project.
   The properties page appears.
2. Open the Properties menu, and click Product Description.
   The product description page appears.
3. Click New.
   The create page appears.
4. Complete the following fields in the General section:
   
   **Title**
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
   Limit: 80 characters

   **ID**
   Displays the unique identifier for the document.
   Limit: 80 characters
5. Complete the following fields in the Report Information section:

**Product or Service**

Defines the name of the product or service.

**Purpose**

Defines the purpose for the product or service.

**Full Explanation**

Defines the full explanation of the product or service.

6. Complete the following fields in the Draft of Full Product or Service Description section:

- Functional and Performance Requirements
- Quality Requirements
- Cost Requirements
- Other


7. Define the following remaining fields in the Draft of Full Product or Service Description section, and save:

**Attachment(s)**

Specifies the attachments associated with the document.

**Description of Attachment(s)**

Defines the description of the attachments associated with the document.

**Limits:** 2000 characters

The product description document is created.

---

**View List of Product Description Documents**

Use the product description page of project properties to view a list of product description documents. The details include the document title, approval status, the date the document was last updated, the date the product description was submitted, the date the product description was approved, and the number of days the document is in review.

To view the page, open the project, and from the Properties menu, click Product Description.
The following details display on the page:

**Title**
Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

**Limit:** 80 characters

**Approval Status**
Displays the approval status for the document as a stoplight.

**Values:**
- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

**Stoplights:**
- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.

**Last Updated Date**
Displays the date the document was last updated and saved.

**Submitted Date**
Displays the date that the project manager submitted the document for review.

**Approved Date**
Displays the date the document was approved or rejected.

**Days in Review**
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

**Stoplights:**
- Green. The document is in review stage for less than five days.
Yellow. The document is in review stage for five or more days, but less than ten days.

Red. The document is in review stage for greater than ten days.

**Edit Product Description Documents**

The properties page is the default page that displays when you open this document. The fields on the page are defined in the General section when you first created the document. Additional fields are also displayed that you require completing before you submit the document for approval.

The fields for the other sections of the document are displayed on separate pages, which you can access from the properties menu. You can edit many of the fields displayed on the pages. Some, though, are display only.

**Follow these steps:**

1. Open the project.
   The properties page appears.

2. Open the product description document.
   The product properties page appears.

3. Edit the following fields in the General section, and save:

   **Title**
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

   **Limit:** 80 characters

   **ID**
   Displays the unique identifier for the document.

   **Limit:** 80 characters

   **Prepared By**
   Displays the name of the resource who created the document.

   **Limit:** 80 characters

   **Last Updated Date**
   Displays the date the document was last updated and saved.

   **Approval Status**
   Displays the approval status for the document as a stoplight.
Values:
- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

Stoplights:
- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.

Submit for Review

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

Project Charter Documents

The project charter document records the existing project.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Project Charter Documents

Follow these steps:

1. Open the PMBOK Guide project.
   The properties page appears.
2. Open the Properties menu, and click Product Charter.
   The project charter page appears.
3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   **Name**
   Defines the name of this project charter. Once you submit the document for review, this field is display only. In management views, the title is the name of the project charter and is the project link. On the project dashboard page, the document name represents the project charter and is a link to the project charter.
   
   **Limit:** 80 characters

   **ID**
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

5. Complete the following fields in the Overview section:

   - **Synopsis.** The synopsis you enter here displays in the Project Status Snapshot report as the Project Description/Synopsis.
   - **Purpose/Business Need**
   - **Purpose/Business Need Details**
   - **Product Description and Deliverables**
   - **Project Management**


6. Complete the following fields in the Assumptions, Constraints and Issues section:

   - **Assumptions**
   - **Constraints**
   - **Issues**


7. Complete the following fields in the Resources section:

   **Personnel Resources**
   Defines the resources that perform the tasks on this project. The resources who are not already on the project as team members are added to the project as team members when this document is approved.
Financial Resources

Defines the financial resources for this project charter.

**Important!** If you define financial resources but not a detailed budget for the project, then when the reviewer approves this project charter, the project planned cost is populated with the value. If you have not defined the project planned cost start date and planned cost finish dates, the date fields are populated with the project Start Date and Finish Date field values. The Planned Cost, Planned Cost Start, and Planned Cost Finish fields appear on the budget properties page. The Start Date and Finish Date fields appear on the schedule page of properties page.

Other Resources

Defines the other resources for the project charter.

Approach

Defines the approach planned for this project.

8. Complete the following fields in the Communication Plan section:
   - Communication and Reporting
   - Acceptance
   - Change Management
   - Other


9. Define the following remaining fields in the Communication Plan section, and save:
   - Attachment(s)
     - Specifies the attachments associated with the document.
   - Description of Attachment(s)
     - Defines the description of the attachments associated with the document.
     - **Limits:** 2000 characters

The project charter document is created.

View List of Project Charter Documents

Use the project charter page to view a list of project charter documents, including details such as the document title, approval status, the date the document was last updated, the date the charter was submitted, the date the charter was approved, the number of days the document is in review, and the charter’s business reason.
To view this page, open the project, and from the Properties menu, click Project Charter.

You can view the following details on the page:

**Title**

Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

*Limit: 80 characters*

**Approval Status**

Displays the approval status for the document as a stoplight.

*Values:*

- **New.** The document is in draft mode and not submitted for approval.
- **Submitted for Review.** The document is submitted for approval but not approved.
- **Approved.** The document is submitted for approval and approved.
- **Rejected.** The document is submitted for approval and rejected.

*Stoplights:*

- **Grey.** The approval status is "New" and not submitted for approval.
- **Yellow.** The approval status is "Submitted for Review" but not approved.
- **Green.** The approval status is "Approved". The document is submitted for approval and approved.
- **Red.** The approval status is "Rejected". The document is submitted for approval and rejected.

**Last Updated Date**

Displays the date the document was last updated and saved.

**Submitted Date**

Displays the date that the project manager submitted the document for review.

**Approved Date**

Displays the date the document was approved or rejected.

**Days in Review**

Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.
**Stoplights:**

- **Green.** The document is in review stage for less than five days.
- **Yellow.** The document is in review stage for five or more days, but less than ten days.
- **Red.** The document is in review stage for greater than ten days.

**Purpose**

Displays the defined purpose or business need for this project. The data for the field is derived from the Purpose/Business Need field on the project charter properties page.

**Edit Project Charter Documents**

The properties page is the default page that displays when you open this document. The fields on the page are defined in the General section when you first created the document. Additional fields are also displayed that you require completing before you submit the document for approval.

The fields for the other sections of the document are displayed on separate pages, which you can access from the properties menu. You can edit many of the fields displayed on the pages. Some, though, are display only.

**Follow these steps:**

1. **Open the project.**
   The properties page appears.

2. **Open the project charter document.**
   The project charter properties page appears.

3. **Edit the following fields in the General section, and save:**

   **Name**

   Defines the name of this project charter. Once you submit the document for review, this field is display only. In management views, the title is the name of the project charter and is the project link. On the project dashboard page, the document name represents the project charter and is a link to the project charter.

   **Limit:** 80 characters

   **Designated Project Manager**

   Defines the name of the resource designated as the manager for this project. Click the Browse icon to select a project manager.

   **Default:** The name of the project manager
Submit for Review

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

Project Scope Statement Documents

The project scope statement records the expectations for the project deliverables and objectives among the stakeholders.


See the *PMI® Compendium of Project Management Practices* for more information.

Create Project Scope Statement Documents

Follow these steps:

1. Open the PMBOK Guide project.
   The properties page appears.

2. Open the Properties menu, and click Project Scope Statement.
   The project scope statement page appears.

3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   **Scope Statement Name**
   Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

   **ID**
   Displays the unique identifier for the document.
   **Limit:** 80 characters

5. Complete the following fields in the Scope Statement Information and Project Objectives sections, and save:
   - Project Justification
   - Product Description
Project Scope Statement Documents

- Project Deliverables
- Cost Objectives
- Schedule Objectives
- Quality Measures
- Other Objectives

**Attachment(s)**

Specifies the attachments associated with the document.

**Description of Attachment(s)**

Defines the description of the attachments associated with the document.

**Limits:** 2000 characters

*See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.*

The project scope statement document is saved.

**View List of Project Scope Statement Documents**

Use the project scope statement page to view a list of project scope statement documents. Details include the document name, review status, the date the document was last updated, the date the document was submitted, the date the review was completed, and the number of days the document is being reviewed.

To view the page, open the project, and from the Properties menu, click Project Scope Statement.

You can view the following details on the page:

**Scope Statement Name**

Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

**Review Status**

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

**Values:**

- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.
Stoplights:

- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Last Updated Date
Displays the date the document was last updated and saved.

Submitted Date
Displays the date that the project manager submitted the document for review.

Review Completed Date
Displays the date the review for this document was completed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:

- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Edit Project Scope Statement Documents

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

Follow these steps:
1. Open the project.
   The project properties appears.
2. Open the project scope statement document.
   The project scope statement properties page appears.
3. View the following fields in the General section:
   Prepared By
   Displays the name of the resource who created the document.
   Limit: 80 characters
Last Updated Date
Displays the date the document was last updated and saved.

Review Status
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

4. Edit the following field in the General section, and save:

Scope Statement Name
Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

Scope Management Plan Documents
The scope management plan document records how the project management team plans to manage the project scope and handle changes to project scope.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Scope Management Plan Documents

Follow these steps:
1. Open the PMBOK Guide project.
The properties page appears.
2. Open the Properties menu, and click Scope Management Plan.
The scope management plan page appears.
3. Click New.
   
The create page appears.

4. Complete the following fields in the General section:

   **Scope Management Plan Name**
   
   Defines the name of this scope management plan document.
   
   **Limit:** 80 characters

   **ID**
   
   Displays the unique identifier for the document.
   
   **Limit:** 80 characters

5. Complete the following fields in the Plan Information section:

   - Describe how Project Scope will be managed
   - Likelihood of Change (%)
   - Frequency of Change
   - Scope of Change (%)
   - How will scope changes be identified and classified?
   - Describe how changes in project scope will be integrated in the project
   - Additional Remarks


6. Define the following remaining fields in the Plan Information section, and click Submit:

   **Attachment(s)**
   
   Specifies the attachments associated with the document.

   **Description of Attachment(s)**
   
   Defines the description of the attachments associated with the document.
   
   **Limits:** 2000 characters

   The scope management plan document is created and saved.

**View List of Project Scope Statement Documents**

Use the project scope statement page to view a list of project scope statement documents. Details include the document name, review status, the date the document was last updated, the date the document was submitted, the date the review was completed, and the number of days the document is being reviewed.
To view the page, open the project, and from the Properties menu, click Project Scope Statement.

You can view the following details on the page:

**Scope Statement Name**
Defines the name for this project scope statement document. Once you submit the scope statement for review, this field is display only.

**Review Status**
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

**Last Updated Date**
Displays the date the document was last updated and saved.

**Submitted Date**
Displays the date that the project manager submitted the document for review.

**Review Completed Date**
Displays the date the review for this document was completed.

**Days in Review**
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.
Edit Scope Management Plan Documents

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

Follow these steps:
1. Open the project.
   The properties page appears.
2. Open the scope management plan document.
   The scope management plan properties page appears.
3. Edit the following field in the General section, and save:
   **Scope Management Plan Name**
   Defines the name of this scope management plan document.
   **Limit:** 80 characters

Quality Management Plan Documents

The quality management plan document records the team methods and policy of quality control and its plans to control quality in the project.

Do not submit quality management plan documents for review.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

See the PMI® Compendium of Project Management Practices for more information.

Create Quality Management Plan Documents

Follow these steps:
1. Open the PMBOK Guide project.
   The project properties page appears.
2. Open the Properties menu, and click Quality Management Plan.
   The quality management plan properties page appears.
3. Click New.
   The create quality management plan page appears.

4. Complete the following fields in the General section:
   - **Quality Management Plan Name**
     Defines the name of this document.
   - **ID**
     Displays the unique identifier for the document.
     Limit: 80 characters

5. Complete the following fields in the Project Quality System and Quality Management Plan sections, and save:
   - Organizational Structure
   - Roles and Responsibilities
   - Procedures
   - Processes
   - Resources
   - Quality Control
   - Quality Assurance
   - Quality Improvement
   - **Attachment(s)**
     Specifies the attachments associated with the document.
   - **Description of Attachment(s)**
     Defines the description of the attachments associated with the document.
     Limits: 2000 characters


**View List of Quality Management Plan Documents**

Use the quality management plan page of project properties to view a list of quality management plan documents. To view this page, open the project and from the Properties menu, click Quality Management Plan.

You can view the following details on the page:
Quality Management Plan Name
Defines the name of this document.

Last Updated Date
Displays the date the document was last updated and saved.

Edit Quality Management Plan Documents
The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

Follow these steps:
1. Open the project.
   The project properties page appears.
2. Open the Quality Management Plan document.
   The quality management plan properties page appears.
3. View the following fields in the General section:
   ID
   Displays the unique identifier for the document.
   Limit: 80 characters
   Prepared By
   Displays the name of the resource who created the document.
   Limit: 80 characters
   Last Updated Date
   Displays the date the document was last updated and saved.
4. Edit the following field in the General section:
   Quality Management Plan Name
   Defines the name of this document.
5. Edit the remaining fields on the page, and save.

Risk Identification - SWOT Analysis Documents
The risk identification - SWOT analysis document records the project team assessment in terms of strengths, weaknesses, opportunities, and threats.

Risk identification - SWOT analysis documents cannot be submitted for review.
Create Risk Identification - SWOT Analysis Documents

Follow these steps:

1. Open the PMBOK Guide project.
   The properties page appears.

2. Open the Properties menu, and click Risk Identification - SWOT Analysis.
   The SWOT analysis page appears.

3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   - **Name**
     Defines the name of this document.
     **Limit:** 80 characters

   - **ID**
     Displays the unique identifier for the document.
     **Limit:** 80 characters

5. Complete the following fields in the SWOT Analysis Report Information section, and save:
   - Project Strengths
   - Project Weaknesses
   - Project Opportunities
   - Project Threats


The risk identification -SWOT analysis document is saved.
View List of Risk Identification - SWOT Analysis Documents

Use the SWOT analysis page to view a list of risk identification - SWOT analysis documents. To view the page, open the project, and from the Properties menu, click Risk Identification - SWOT Analysis.

The following details display on the page:

**SWOT Analysis Report**

Defines the name of the document. The value for this field is derived from the Report Name field on the SWOT Analysis properties page.

**Last Updated Date**

Displays the date the document was last updated and saved.

Edit Risk Identification - SWOT Analysis Documents

The properties page displays, by default, when you open a document. You can view and edit the fields defined when you first created the document.

**Follow these steps:**

1. Open the project.
   
   The properties page appears.

2. Open the Properties menu, and click Risk Identification - SWOT Analysis.
   
   The SWOT analysis page lists the risk identification - SWOT analysis documents.

3. Click the name of the document.
   
   The SWOT analysis properties page appears.

4. View and edit the following fields in the General section, and save:

   **Report Name**

   Defines the name of this document.

   **Limit:** 80 characters

   **ID**

   Displays the unique identifier for the document.

   **Limit:** 80 characters

   **Prepared By**

   Displays the name of the resource who created the document.

   **Limit:** 80 characters
**Last Updated Date**

Displays the date the document was last updated and saved.

---

**Project Report Documents**

The project report document records the various project statuses, such as scope, schedule, and overall outlook. The report also records plans to address any open issues.


See the *PMI® Compendium of Project Management Practices* for more information.

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**Create Project Report Documents**

Create project report documents using the project report page.

**Follow these steps:**

1. Open the PMBOK Guide project.
   
   The properties page appears.

2. Open the Properties menu, and click Project Report.
   
   The project report properties page appears.

3. Click New.
   
   The create page appears.

4. Complete the following fields in the General section:
   
   **Report Name**
   
   Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

   **ID**

   Displays the unique identifier for the document.

   **Limit:** 80 characters
5. Complete the following fields in the Status of Project Relative to Project Objectives section:

**Scope Status**

The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

**Values:**
- On Scope. The project is on scope.
- Off Scope. The project is off scope.

**Stoplights:**
- Grey. The project scope status is not defined.
- Green. The project scope status is "On Scope".
- Red. The project scope status is "Off Scope".

**Scope Details**

Defines the scope details for the document.

**Limits:** 2000 characters

**Schedule Status**

Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:

- If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.

- If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.

- If a project report exists but not baselined, the days of delay is calculated by using the difference between the Finish Date field on the schedule page of project properties and the current date, and the value is used.

**Stoplights:**
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.
Schedule Details
Defines the details of the schedule.

Limit: 2000 characters

Cost Status
Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

Values:
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

Cost Details
Defines the cost details.

Limit: 2000 characters

Quality Status
Specifies the status of the quality for this project plan. Once you submit the document for review, this field displays as a stoplight to represent the project quality.

Values:
- Excellent. The overall project quality is excellent.
- Good. The overall project quality is good.
- Fair. The overall project quality is fair.
- Poor. The overall project quality is poor.

Stoplights:
- Green. The overall project quality is excellent.
- Yellow. The overall project quality is fair.
- Red. The overall project quality is poor.

Quality Details
Defines the quality details.

Limit: 2000 characters

Project Outlook
Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.
Values:
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

Stoplights:
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

Project Status Outlook Details
Defines the details of the project status outlook.

Limits: 2000 characters

6. Complete the following fields in the Progress Report section, and save:
- Status of Project Work to Date, Including Progress Reported This Period
- Special Problems or Issues to be Addressed
- Plans For Next Period
- Other Notes and Concerns
- Key Changes
- Estimate
- Issues or Comments

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

The project report document is saved.

View List of Project Report Documents

You can view a list of project report documents using the project report page of project properties. Details include the document name, the date the document was last updated, review status, review completed date, and the number of days the document is in review.

To view the page, open the project, and from the Properties menu, click Project Report.

You can view the following details on the page:
Report Name

Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

Report Last Updated

Displays the date this project report document was last updated and saved.

Review Status

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:

- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:

- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Review Completed Date

Displays the date the review for this document was completed.

Days in Review

Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:

- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.
Edit Project Report Documents

The properties page is the default page that displays when you open a document. The fields on this page are defined in the General section when you first created the document. Additional fields also display requiring completion before submitting the document for review.

The fields for the other sections of the document are on separate pages, which you can access from the Properties menu, and edit.

See A Guide to the Project Management Body of Knowledge (PMBOK Guide) for more information.

Follow these steps:
1. Open the project.
   The properties page appears.
2. Open the project report document for editing.
   The project report properties page appears.
3. View the following:
   ID
   Displays the unique identifier for the document.
   Limit: 80 characters
   Prepared By
   Displays the name of the resource who created the document.
   Limit: 80 characters
   Report Last Updated
   Displays the date this project report document was last updated and saved.
   Review Status
   Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
   Values:
   New. The document is in draft mode and not submitted for review.
   Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
   Review Completed. The document is submitted for review and is reviewed.
Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Baseline Start
Displays the date of starting the project baseline revision, if a baseline on the project exists. The value for this field is based on the Baseline Start field on the baseline revision properties page.

Baseline Finish
Displays the project baseline revision finish date, if a baseline on the project exists. The value for this field is based on the Baseline Finish field on the baseline revision properties page.

Budget Benefit
Displays the project planned benefit amount at the time of saving the project report. The value for this field is based on the Planned Benefit field on the budget page of project properties.

Budget Cost
Displays the project planned cost amount at the time of saving the project report. The value for this field is based on the Planned Cost field on the budget page of project properties.

ROI %
Displays the project planned ROI at the time of saving the project report. The value for this field is based on the Planned ROI field on the budget page of project properties.

Actual Cost
Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

ETC
Displays the estimate to completion at the time of saving the project report.

EAC
Displays the system-calculated value of estimate at completion (EAC), which is the total cost of all actual work completed to date plus the predicted cost finishing the remaining work. Assuming, the project continues at the same cost performance index. EAC uses the following formula:
EAC = AC + [(BAC - EV) / CPI]
4. Edit the following fields in the General section, and save:

   **Report Name**
   Defines the name of this project report document. Once you submit the report for review, this field becomes display-only. In management views, the report name is a link to the project report.

**Lessons Learned Documents**

The lessons learned document records best practices and recommendations for improvements. The aim is to improve project practices for the rest of the project and for future projects.


See the *PMI® Compendium of Project Management Practices* for more information.

**Create Lessons Learned Documents**

*Follow these steps:*

1. Open the project.
   The properties page appears.

2. Open the Properties menu, and click Lessons Learned.
   The lessons learned properties page appears.

3. Click New.
   The create page appears.

4. Complete the following fields in the General section:

   **Title**
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

   *Limit: 80 characters*

   **ID**
   Displays the unique identifier for the document.

   *Limit: 80 characters*
5. Complete the following fields in the Report Information section:

**Lessons Learned Category**
Defines the category for this document. Once you submit this document for review, this field becomes display only.

*Values*: Process Change, Framework/Methodology, Organizational Change, Technology Change, Other, and TBD

**Specific Project Management Process Being Used**
Defines the specific project management process that you are using for this project. Once you submit the document for review, this field becomes display only.

*Limit*: 2000 characters

6. Complete the following fields in the Specific Practice, Tool or Technique Being Used section:

- Action Undertaken
- Result of Action Undertaken
- Preferred Result


7. Complete the following fields in the Specific Lessons Learned and Recommendations sections:

- Lessons Learned
- What behavior is recommended for the future?
- Where and how can this knowledge be used later in this current project?
- Where and how can this knowledge be used in future projects?
- Reviewers of Lessons Learned
- Communication/Distribution of Lessons Learned
- Communication Details


8. Define the following remaining fields in the Recommendations section, and save:

**Attachment(s)**
Specifies the attachments associated with the document.

**Description of Attachment(s)**
Defines the description of the attachments associated with the document.

*Limits*: 2000 characters
The lessons learned document is created.

**View List of Lessons Learned Documents**

Use the lessons learned properties page to view a list of lessons learned documents. Details include the document name, the date the document was last updated, the lessons learned category, review status, review completed date, and the number of days the document is in review.

To view this page, open the project, and from the Properties menu, click Lessons Learned.

You can view the following details on the page:

**Report**
- Displays the name of the document. You can click the document name to open the document.

**Last Updated Date**
- Displays the date the document was last updated and saved.

**Lessons Learned Category**
- Defines the category for this document. Once you submit this document for review, this field becomes display only.
  - **Values:** Process Change, Framework/Methodology, Organizational Change, Technology Change, Other, and TBD

**Review Status**
- Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
  - **Values:**
    - New. The document is in draft mode and not submitted for review.
    - Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
    - Review Completed. The document is submitted for review and is reviewed.
  - **Stoplights:**
    - Grey. The document not submitted for review.
    - Green. The document is submitted for review and the review is complete.
    - Yellow. The document is submitted for review but not reviewed.
Edit Lessons Learned Documents

The properties page is the default page that displays when you open a document. The fields on this page are defined in the General section when you first created the document. Additional fields also display requiring completion before submitting the document for review.

The fields for the other sections of the document are on separate pages, which you can access from the Properties menu, and edit.

Follow these steps:

1. Open the project.
   The properties page appears.
2. Open the Lessons Learned document.
   The lessons learned properties page appears.
3. Edit the following fields in the General section, and save:

   **Title**
   Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
   **Limit:** 80 characters

   **ID**
   Displays the unique identifier for the document.
   **Limit:** 80 characters

   **Prepared By**
   Displays the name of the resource who created the document.
   **Limit:** 80 characters

   **Last Updated Date**
   Displays the date the document was last updated and saved.

   **Review Status**
   Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
   **Values:**
   - New. The document is in draft mode and not submitted for review.
   - Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
   - Review Completed. The document is submitted for review and is reviewed.
**Stoplights:**

- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

**Submit for Review**

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

**Default:** Cleared

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**Project Closure Documents**

The project closure document reviews all key customer requirements and records that the customer has accepted the project product and deliverables.


See the *PMI® Compendium of Project Management Practices* for more information.

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**Create Project Closure Documents**

**Follow these steps:**

1. Open the PMBOK Guide project.
   
   The properties page appears.

2. Open the Properties menu, and click Project Closure.
   
   The project closure page appears.

3. Click New.
   
   The create page appears.

4. Complete the following fields in the General section:

   **Name**
   
   Defines the name of this document.

   **Limit:** 80 characters

   **ID**
   
   Displays the unique identifier for the document.

   **Limit:** 80 characters
5. Complete the following fields in the Project Results section:

**Customer Has Accepted All Project Results**
Defines the list of all the project results.

**Accepted by**
Defines the name of the resource who accepted this document.

6. Complete the following fields in the All Other Deliverables section:

**Customer Has Accepted All Other Deliverables**
Defines the list of all the project deliverables.

**Accepted by**
Defines the name of the resource who accepted this document.

7. Complete the following fields in the All Other Project Requirements section:

**Customer Has Accepted All Other Project Requirements**
Defines the list of all the project requirements.

**Accepted by**
Defines the name of the resource who accepted this document.

8. Complete the following fields in the Other section, and save:

- Explain Any Exceptions to the Above
- Documentation for the Above Has Been Filed/Archived as Follows
- Comments or Remaining Issues


**View List of Project Closure Documents**

Use the project closure page to view a list of project closure documents. The details include the document name, the date the document was last updated, review status, review completed date, and the number of days the document is in review.

To view this page, open the project, from the Properties menu, and click Project Closure.

You can view the following details on the page:

**Report**
Displays the name of the document. You can click the document name to open the document.
Last Updated Date
Displays the date the document was last updated and saved.

Review Status
Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Review Completed Date
Displays the date the review for this document was completed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Edit Project Closure Documents
Use the project closure page to view a list of project closure documents.

The properties page is the default page that displays when you open a document. It displays the fields that you defined when you first created the document, as well as additional fields you must complete before you submit the document for review. You can edit many of the fields displayed on this page.
Follow these steps:

1. Open the project.
   The properties page appears.

2. Open the Properties menu, and click Project Closure.
   The project closure properties page appears displaying a list of project closure documents.

3. Click the name of the project closure document for editing.
   The project closure properties page appears.

4. Edit the following fields in the General section:
   
   **Name**
   Defines the name of this document.
   **Limit:** 80 characters

   **ID**
   Displays the unique identifier for the document.
   **Limit:** 80 characters

   **Checklist Submitted by**
   Defines the name of the resource submitting the document.

   **Last Updated Date**
   Displays the date the document was last updated and saved.

   **Review Status**
   Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.

   **Values:**
   - New. The document is in draft mode and not submitted for review.
   - Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
   - Review Completed. The document is submitted for review and is reviewed.

   **Stoplights:**
   - Grey. The document not submitted for review.
   - Green. The document is submitted for review and the review is complete.
   - Yellow. The document is submitted for review but not reviewed.
Submit for Review

Specifies to submit this PMBOK Guide project document for review. Select the check box to submit the document for review.

Default: Cleared

5. Edit the fields in the remaining sections, and save.
Chapter 4: Management Views

This section contains the following topics:

- Access the Detailed Management Views (see page 73)
- Project Charters (see page 73)
- Project Reports (see page 75)
- Risks, Issues, and Change Requests (see page 78)
- Lessons Learned (see page 83)
- Executive Dashboard (see page 84)

Access the Detailed Management Views

To access a management view, click a management view from the Management Views menu.

Use the views menu to view management and executive summary data of PMBOK Guide project documents. For example, you can view a detailed list of all the project reports to which you have access using the project reports page.

Some details include the project name to which the document is associated, the document name or title, and the statuses for review, quality, and scope. Some of the management views have tabs, which you can click to view document-specific data in portlets on the page.

Project Charters

The project charters page is a management summary view. The page includes data from all the project charter documents for the PMBOK Guide projects to which you have access. Each item in the list represents a project charter document. If a project charter document does not exist, the list is empty. You can click the document title to open the document.

By default, the documents submitted for review display in the list. You can use the Approval Status filter field to see documents that are still in draft.

To view this page, click Project Charters from the Management Views menu.
You can view details from the project charter documents using the following columns displayed on the page:

**Title**
Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.

*Limit: 80 characters*

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Project Manager**
Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

**Last Updated Date**
Displays the date the document was last updated and saved.

**Approval Date**
Displays the date this document was approved or rejected.

**Approval Status**
Displays the approval status for the document as a stoplight.

*Values:*
- New. The document is in draft mode and not submitted for approval.
- Submitted for Review. The document is submitted for approval but not approved.
- Approved. The document is submitted for approval and approved.
- Rejected. The document is submitted for approval and rejected.

*Stoplights:*
- Grey. The approval status is "New" and not submitted for approval.
- Yellow. The approval status is "Submitted for Review" but not approved.
- Green. The approval status is "Approved". The document is submitted for approval and approved.
- Red. The approval status is "Rejected". The document is submitted for approval and rejected.
Days in Review

Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:

- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Purpose

Displays the defined purpose or business need for this project. The data for the field is derived from the Purpose/Business Need field on the project charter properties page.

Project Reports

The project reports page is a management summary view that includes details on the project report documents to which you have access. Each item in the list represents a project report document. If no project report documents exist, the list is empty. You can click the report name to open the document.

To view this page, click Project Reports from the Management Views menu.

You can view details from the project report documents using the following columns that display on the page:

Project

Displays the name of the project to which this document is associated. Click the project name to open the project.

Report

Displays the name of the document. You can click the document name to open the document.

Last Updated Date

Displays the date the document was last updated and saved.

Review Status

Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Values:
- New. The document is in draft mode and not submitted for review.
- Submitted for Review. The document is submitted for review but not reviewed by all reviewers.
- Review Completed. The document is submitted for review and is reviewed.

Stoplights:
- Grey. The document not submitted for review.
- Green. The document is submitted for review and the review is complete.
- Yellow. The document is submitted for review but not reviewed.

Days in Review
Displays the number of days the document is undergoing review and a stoplight to represent the number of days. If you submit the document for review and it is being reviewed, the number and stoplight displays. If the document is not submitted for review, or is approved or rejected, the field is rendered empty.

Stoplights:
- Green. The document is in review stage for less than five days.
- Yellow. The document is in review stage for five or more days, but less than ten days.
- Red. The document is in review stage for greater than ten days.

Submitted Date
Displays the date that the project manager submitted the document for review.

Scope Status
The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

Values:
- On Scope. The project is on scope.
- Off Scope. The project is off scope.

Stoplights:
- Grey. The project scope status is not defined.
- Green. The project scope status is "On Scope".
- Red. The project scope status is "Off Scope".

Schedule Status
Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:
If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.

If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.

If a project report exists but not baselined, the days of delay is calculated by using the difference between and the Finish Date field on the schedule page of project properties and the current date, and the value is used.

Stoplights:
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

Cost Status

Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

Values:
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

Quality Status

Specifies the status of the quality for this project plan. Once you submit the document for review, this field displays as a stoplight to represent the project quality.

Values:
- Excellent. The overall project quality is excellent.
- Good. The overall project quality is good.
- Fair. The overall project quality is fair.
- Poor. The overall project quality is poor.

Stoplights:
- Green. The overall project quality is excellent.
Risks, Issues, and Change Requests

- Yellow. The overall project quality is fair.
- Red. The overall project quality is poor.

Project Outlook

Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

Values:
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

Stoplights:
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

Risks, Issues, and Change Requests

Managers and executives can use the Risks, Issues and Change Requests view to view data across all PMBOK Guide projects in an organization. Project managers can also use this view to view metrics across all their assigned PMBOK Guide projects.

The risks page is the default page that opens when you click Risks, Issues and Change Requests from the Management Views menu. From this page you can access the following other pages from the dashboard:
- Project Issues (see page 80)
- Project Change Requests (see page 82)

Project Risks Portlet

You can view a detailed summary of all of the risks to which you have access using the project risks portlet. This portlet displays on the risks page.
This page includes the following columns:

**Above Threshold**
Displays a yellow check mark to indicate that the risk score has exceeded the risk threshold. The risk threshold is the acceptable level of risk that can be tolerated without acting out the risk response strategy. The threshold is based on the impact and probability factors. This is a system-level value for all projects that the CA Clarity PPM administrator sets. The value for this field is based on the Impact and Probability fields on the risk properties page.

**Probability**
Displays the probability that the impact occurs in the form of a stoplight. The risk probability is used to calculate the risk exposure.

**Stoplights:**
- Green. The risk has a low probability of occurring.
- Yellow. The risk has a medium probability of occurring.
- Red. The risk has a high probability of occurring.

**Impact**
Displays the effect of the particular risk on the project, determined by the risk effect on the project performance, supportability, cost, and schedule. This risk impact is used to calculate the risk exposure.

**Stoplights:**
- Green. This risk has a low impact on the project.
- Yellow. This risk has a medium impact on the project.
- Red. This risk has a high impact on the project.

**Risk ID**
Displays the unique identifier assigned to the risk for tracking.

**Risk**
Displays the short name for the risk.

**Limit:** 64 characters

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Category**
Displays the risk category assigned to this risk.

**Values:** Objectives, Sponsorship, Funding, Resource Availability, Interdependencies, Technical, Human Interface, Organizational Culture, Supportability, Implementation, and Flexibility.
Owner

Displays the resource who manages the risk. This resource is responsible for ensuring that the risk is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, the owner information is carried over to the issue or change request.

Send Mail

Opens an email from your default email client addressed to the resource who created the request.

Target Resolution Date

Displays the target date of resolving the risk. This date is the same or earlier than the impact date.

Project Issues Portlet

You can view a detailed summary of all of the issues to which you have access using the project issues portlet. This portlet displays on the issues page.

This page includes the following columns:

Schedule

Displays the schedule status for the project. If a project report document exists, the value for this field is based on the Schedule Status field on the Project Report Properties page. If a project report does not exist, then the value for this field is based on the Baseline Finish Date field on the Baseline Revision Properties page. This field displays as a stoplight to represent the project's schedule status.

Important! For the stoplight to display a color, you must first baseline the project.

Values:

- On Track. The project schedule status is on schedule (no days late).
- Ahead of Schedule. The project schedule status is earlier than the scheduled completion date.
- Late (<10 days). The project schedule status is less than or equal to 10 days late.
- Late (>10 days). The project schedule status is greater than 10 days late.

Stoplights:

- White. The project schedule status is not defined.
- Green. The project is on schedule (no days late).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

**Priority**
Displays the priority level of this issue.

**Values:** Low, Medium, and High

**Issue ID**
Displays the unique identifier assigned to the issue for tracking.

**Issue**
Defines the short name for the issue.

**Limits:** 64 characters

**Project**
Displays the name of the project to which this document is associated. Click the project name to open the project.

**Category**
Displays the category to which the issue is assigned.

**Values:** Flexibility, Funding, Human Interface, Implementation, Interdependencies, Objectives, Organizational Culture, Resource Availability, Sponsorship, Success Risk, Supportability, or Technical

**Owner**
Displays the name or the resource managing the issue. This resource is responsible for ensuring that the risk is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, for example, the owner information is carried over to the issue or change request.

**Send Mail**
Opens an email from your default email client addressed to the resource who created the request.

**Target Resolution Date**
Displays the target date of resolving the issue. This date is earlier than the impact date.
Project Change Requests Portlet

You can view a detailed summary of all of the change requests to which you have access using the project change requests portlet. The portlet displays on the change requests page.

This page includes the following columns:

- **Priority**
  - Displays the priority level of the change request.
  - **Values:** Low, Medium, and High

- **Change Request ID**
  - Displays the change request unique identifier.

- **Change Request Name**
  - Defines the short name for the change request. In portlets, this field is read only except when it displays in a portlet to edit. If this field is displayed as a link in a portlet, click the name to open the change request properties page.
  - **Limit:** 64 characters
  - See the *CA Clarity Basics User Guide* for more information.

- **Status**
  - Displays the status for the change request.
  - **Values:** Open, Work in Progress, Closed, and Resolved

- **Project**
  - Displays the project name. You can click the name to open the project properties page.

- **Creator**
  - Displays the name of the resource who created the request.

- **Owner**
  - Displays the name of the resource managing the request. This resource is responsible for ensuring that the request is managed and tracked appropriately through its lifecycle. If an issue or change request is created from this risk, for example, the owner information is carried over to the issue or change request.

- **Send Mail**
  - Opens an email from your default email client addressed to the resource who created the request.

- **Expected Close Date**
  - Specifies the expected date of closing the request.
Lessons Learned

Managers and executives can use the Lessons Learned view to view data for lessons learned documents that have been submitted across all PMBOK Guide projects in their organization. Project managers can also use this view to view metrics across all their assigned PMBOK Guide projects. The projects that display in the list are those to which you have access rights. The list does not include project templates.

To view this detail view, click Lessons Learned from the Management Views menu.

You can view details for submitted documents using the following columns:

- **Category Name**
  Displays the category for this lessons learned document.
  **Values:** Process Change, Framework/Methodology, Technology Change, Organizational Change, Other, and TBD.

- **Title**
  Defines the title for the document. Once you submit the document for review, this field becomes display only. In management views, you can click the document title to open the document.
  **Limit:** 80 characters

- **Project**
  Displays the name of the project to which this document is associated. Click the project name to open the project.

- **Project Manager**
  Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

- **Last Updated Date**
  Displays the date the document was last updated and saved.

- **Submitted Date**
  Displays the date that the project manager submitted the document for review.

- **Review Status**
  Displays the review status for the document at the time of creation. In management views and in list views, the field displays as a stoplight.
Executive Dashboard

Managers and executives can use the Executive Dashboard to view data across all PMBOK Guide projects in an organization. Project managers can also use this dashboard to view metrics across all their assigned PMBOK Guide projects. The list displays the projects you have access to.

By default, the data displayed in the portlets on this page is derived from active projects only. You can view the project data, including inactive project data, by using the filter fields.

The projects status page is the default page that opens when you click Executive Dashboard from the Management Views menu. From this page, you can access the following other pages from the dashboard:

- [Project Variance and Performance](see page 26)
- [Projects by Phases](see page 89)

Project Status Portlet

Use the Project Status portlet that displays on the projects status page to view PMBOK Guide metrics and status information across all your assigned PMBOK Guide projects. The list displays the projects you have access to.

See the [Project Management User Guide](#) for more information.

The following fields are displayed on the portlet:

**Project**

Displays the name of the project to which this document is associated. Click the project name to open the project.
Project Phase
Displays the project phase for this project. In management views, the phase displays in a bar graph. The shaded area indicates the phase for the project. You can roll your cursor over the bar to view the phase status, the progress, and the total number of phases for that project. The value for this field is based on the Phase field on the project properties page.

Project Manager
Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

Actual Start
Displays the date of starting the project. The value for this field is based on the Start Date field on the schedule page of project properties.

Actual End
Displays the date of completing the project. The value for this field is based on the Finish Date field on the schedule page of project properties.

Baseline Start
Displays the date of starting the project baseline revision, if a baseline on the project exists. The value for this field is based on the Baseline Start field on the baseline revision properties page.

Baseline End
Displays the date of completing the project baseline revision, if a baseline on the project exists. The value for the field is based on the Baseline Finish field on the baseline revision properties page.

Risk Status
Displays a stoplight to represent the project status level with risks. The value for the field is based on the highest probability of open risks entered on the risks page.

Stoplights:
- Grey. The project has no risk data.
- Green. All of the project risks are of low priority.
- Yellow. The project has at least one risk of medium priority and no high priority risks.
- Red. The project has at least one risk of high priority.
**Issue Status**

Displays the project status level with issues in the form of a stoplight to represent the status. The value for this field is based on the Status field on the issue properties page.

**Default:** Open

**Stoplights:**

- Grey. The project has no issue data.
- Green. All of the project issues are of low priority.
- Yellow. At least one of the project issues is of medium priority and no high priority issues exist for the project.
- Red. At least one of the project issues is of high priority.

**Change Requests Status**

Displays a check mark if at least one change request is logged for the project. You can mouse over the check mark to display the number of change requests created in the rollover text.

**Scope Status**

The scope status for the project relative to the project objectives. The value for the field is derived from the project report properties page. When viewing the field in portlets, the status displays as a stoplight.

**Values:**

- On Scope. The project is on scope.
- Off Scope. The project is off scope.

**Stoplights:**

- Grey. The project scope status is not defined.
- Green. The project scope status is "On Scope".
- Red. The project scope status is "Off Scope".

**Schedule Status**

Specifies the schedule status for the project. The value for the field is based on the following checks performed in the order listed:

- If a project report exists, the value from the Schedule Status field on the project report properties page of the most recent project report document is used.
- If a project report does not exist but is baselined, the days of delay is calculated by using the difference between the Baseline Finish field on the baseline revision properties page and the Finish Date field on the schedule page of project properties, and the value is used.
If a project report exists but not baselined, the days of delay is calculated by using the difference between and the Finish Date field on the schedule page of project properties and the current date, and the value is used.

**Stoplights:**
- White. The project schedule status is not defined.
- Green. The project is on schedule (no delay).
- Yellow. The project is less than or equal to 10 days late.
- Red. The project is more than 10 days late.

**Cost Status**
Specifies the status of the cost for the project plan based on the project planned cost amount. The cost amount is a field on the budget page of project properties. Once you submit the project report document for review, this field is display only. In management views, the status is display only.

**Values:**
- On Budget. The project plan is on budget with the project planned cost.
- Under Budget. The project plan cost is below the project planned cost.
- Over Budget. The project plan cost is above the project planned cost.

**Project Outlook**
Specifies the status of the project outlook. The field displays a check mark on the project report properties page. The status displays as a stoplight in portlets.

**Values:**
- Excellent. The overall project outlook is excellent.
- Good. The overall project outlook is good.
- Fair. The overall project outlook is fair.
- Poor. The overall project outlook is poor.

**Stoplights:**
- Green. The overall project outlook is good or excellent.
- Yellow. The overall project outlook is fair.
- Red. The overall project outlook is poor.

**Project Variance and Performance Portlet**
You can view the project variance and performance data of all active PMBOK Guide projects within your organization using the project variance and performance portlet. The list displays the projects you have access to. The portlet displays on the project variance and performance page.
The following fields are displayed on this portlet:

**Project**

Displays the name of the project to which this document is associated. Click the project name to open the project.

**Project Manager**

Displays the name of the resource managing the project associated with this document. Click the project manager name to open the resource properties page. The value for this field is based on the Manager field on the project properties page.

**Baseline Start**

Displays the planned date of starting that the project based on the current baseline. The value for this field is derived from the baseline revision properties page.

**Baseline End**

Displays the planned date of completing the project based on the current baseline. The value for the field is derived from the Baseline Finish field on the baseline revision properties page.

**EAC**

Displays the system-calculated value of estimate at completion (EAC), which is the total cost of all actual work completed to date plus the predicted cost finishing the remaining work, based on the following formula:

\[
EAC = AC + ETC
\]

**BAC**

Displays the total planned value for the project, which is also known as the Planned Value (PV). The Budget at Completion (BAC) is the authorized budget assigned to the work yet to start for a project or work breakdown structure component. This value is system-calculated.

**Actual Cost**

Displays the actual cost (AC) at the task level, which is the total cost incurred and recorded in performing the project work, or work breakdown structure component. The actual cost is the total cost incurred in performing the work that the EV measured.

**Planned Value**

Displays the planned value (PV) is a system-calculated value representing the Budgeted Cost of Scheduled Work (BCWS). PV is the authorized budget assigned to the project work not started, or a work breakdown structure component. The total planned value for the project is also known as Budget At Completion (BAC).

PV is calculated based on the following formula:

\[
PV = \text{Sum of BAC through a point in time}
\]
Earned Value

Displays the earned value (EV) is system-calculated and represents the Budgeted Cost of Work Performed (BCWP). EV is the value indicated in the the approved budget for project work performed, or work breakdown structure component.

EV is calculated using the following formula:
Earned Value (EV) = Budget At Completion (BAC) for a task \times \text{% Complete}

Cost Variance

Displays the cost variance (CV), which is the value of work accomplished as against the amount spent to date.

CV is calculated using the following formula:
Cost Variance (CV) = Earned Value (EV) - Actual Cost (AC)

Schedule Performance Index

Displays the system-calculated value of the schedule performance index (SPI). The value represents the ratio of work performed to work scheduled.

SPI is based on the following formula:
Schedule Performance Index (SPI) = \frac{Earned Value}{Planned Value}

Note: A value less than one indicates the work is behind schedule.

Cost Performance Index

Displays the system-calculated value of Cost Performance Index (CPI), which is an efficiency rating for work accomplished.

CPI is based on the following formula:
Cost Performance Index (CPI) = \frac{Earned Value}{Actual Costs}

Note: A value greater than one indicates the costs are running over budget.

Projects by Phases Portlet

The project by phases portlet displays a bar chart of those projects to which you have access. The portlet displays on the project by phases page of executive dashboard. The portlet is designed for senior executives or senior users to view phase data across all PMBOK Guide projects in their organization and to which they have access. The list only includes projects and not project templates.

The bar displays the project count in each phase. You can roll your cursor over a bar to display the percentage of PMBOK Guide projects that are at a particular phase. The percentage is based on the following calculation:
The number of PMBOK Guide projects per phase / the number of PMBOK Guide projects
The default phase type displayed in Standard. You can use the filter to view projects in phases for different phase types.

The following field is displayed on this portlet:

**Project Phase**

The phase for this project. This metric is used in portfolio management analysis.

**Values for Standard Phase Type:** Requirements, Design, Build, Test, and Launch
Appendix A: Reports

This section contains the following topics:

Project Report (see page 91)
Project Status Snapshot (see page 92)

Project Report

Description

The Project Report is a Crystal report that provides a summary of the progress to date and the overall project situation. The report contains sufficient information to let project stakeholders decide about what to do next with the project given the information reported. The financial information displayed on the report is from the latest project report. This allows you to view past project reports complete with their historical financial information. When used with project status review meetings, the reports provide essential means to maintain levels of communication among project stakeholders.

Parameters

Project OBS

Indicates the OBS unit to filter the report. Click the Browse icon and select the OBS unit from the list that appears.

Project(s)

Indicates the project data to include in the report. Click the Browse icon and select the projects from the list that appears.

Status

Indicates the review status of the project report documents to include in the report. You can select multiple statuses.

Values: New, Submitted for Review, and Review Completed

Project Manager

Specifies the name of the project manager to filter.

From Date

Defines the date from which to filter this report. To select a specific day, select the Specific Date option and enter a date in the text field in the mm/dd/yyyy format. Or, click the Select Date icon to select a day from the calendar that displays. To select a relative date such as Start of Next Month, select the Relative Date option and select the relative date that applies.
Project Status Snapshot

To Date

Defines the date to which to filter this report. To select a specific day, select the Specific Date option and enter a date in the text field in the mm/dd/yyyy format. Or, click the Select Date icon to select a day from the calendar that displays. To select a relative date such as Start of Next Month, select the Relative Date option and select the relative date that applies from the drop-down.

Report Fields

Fields in this report are similar to the fields in the project report document, such as scope status, schedule status, and cost status.

Project Status Snapshot

Description

The Project Status Snapshot report is a Crystal report that allows project managers to evaluate a project in terms of up-to-date schedule and budgeted cost variance on the phase or task level. This report displays the start date, finish date, percent complete, EAC, BAC, EV, PV, AC, CV, Schedule Performance Index (SPI), and Cost Performance Index (CPI).

Members of the following access groups have access to the report:

- PBK Project Manager
- PBK Executive

Parameters

Project(s)

Indicates the project data to be included in the report. Click the Browse icon and select the projects from the list that appears.

Project Manager

Specifies the name of the project manager to filter.

Level of Detail

Specifies the level of detail to see on the report. Select the level from the drop-down.

Project OBS

Indicates the OBS unit to filter this report. Click the Browse icon and select the OBS unit from the list that appears.
Report Fields

Fields in the report are derived from the latest submitted project report. The project description/synopsis is extracted from the last submitted project charter. Other report fields are the same as the fields in the management views, such as actual cost, earned value, and cost variance.
Appendix B: Access Rights

This section contains the following topics:

PBK Administrator Group Access Rights (see page 95)
PBK Project Manager Group Access Rights (see page 127)
PBK Team Member Group Access Rights (see page 145)
PBK Executive Group Access Rights (see page 148)

PBK Administrator Group Access Rights

Members of this group are granted PMBOK Guide Accelerator-specific access rights and the CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights

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

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**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

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**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

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**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

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**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

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**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**

- 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_scpStmt).

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

**Project - Subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt) - View All**

Allows the user to view all projects using the secured subpage Project Scope Statement (ID: projectCreate.subObjList.pbk_scpStmt).

**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

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

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 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


Process - Cancel

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

**Type:** Instance

**Process - Cancel - All**

Allows users to cancel 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 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 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

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**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

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**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 - Edit Financial**

Allows users to edit the general properties, team, key tasks, and financial information for a specific project. This access right also allows the user to add subprojects to the project, and to view and edit the project using a desktop scheduler, such as Open Workbench and Microsoft Project.

**Type:** Instance

**Project Templates:** PMBOK® Guide Project Planning Checklist Template and PMBOK® Guide Project Template

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**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
PBK Administrator Group Access Rights

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

this access right is changing in v13. waiting for more info from Bill

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 changes requests for any project.

**Type:** Global

this access right is changing in v13. waiting for more info from Bill

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 the user 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 the user 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. Additional report rights are also required to view, edit, or run reports.

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 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

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 information for all resources.
Requires: Resource - Navigate right
Type: Global

Resource - External Access
Allows you access to the Resource list and Resource Finder. The Resource - View right allows you to view the general information, contact information, financial information, calendar, and skills of resources.
Type: Global

Resource - Navigate
Allows you to access resource management pages.
Type: Global

Resource - Soft Book - All
Allows you to soft book any resource for investments to which you have view or edit rights.
Type: Global

Resource - View - All
Lets you view information, except the financial properties of all resources.
Type: Global

Resource - View Book - All
Lets you view bookings for all resources.
Type: Global

Resource - View Financial - All
Lets you view financial properties for all resources. The right is dependent on being granted the 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
   Lets you navigate to timesheet pages.
   **Type:** Global

PBK Project Manager Group Access Rights

Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights

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
PBK Project Manager Group Access Rights

Appendix B: Access Rights

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 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
Appendix B: Access Rights

**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

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


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


Process - Cancel

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

**Type:** Instance

Process - Start
Allows users to start a new process instance from a specific process definition.
Type: Instance

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

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 changes requests for any project.

*Type:* Global

this access right is changing in v13. waiting for more info from Bill
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 the user 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. Additional report rights are also required to view, edit, or run reports.

*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 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 - 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 information for all resources.

**Requires:** Resource - Navigate right

**Type:** Global

**Resource - External Access**

Allows you access to the Resource list and Resource Finder. The Resource - View right allows you to view the general information, contact information, financial information, calendar, and skills of resources.

**Type:** Global

**Resource - Navigate**

Allows you to access resource management pages.

**Type:** Global

**Resource - Soft Book - All**

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

**Type:** Global

**Resource - View - All**

Lets you view information, except the financial properties of all resources.

**Type:** Global

**Resource - View Book - All**

Lets you view bookings for all resources.

**Type:** Global

**Resource - View Financial - All**

Lets you view financial properties for all resources. The right is dependent on being granted the 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

Lets you navigate to timesheet pages.

Type: Global

PBK Team Member Group Access Rights

Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights

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**

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 the user 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
Lets you navigate to timesheet pages.
Type: Global

PBK Executive Group Access Rights
Members of this group are granted PMBOK Guide Accelerator-specific access rights as well as CA Clarity PPM access rights.

PMBOK Guide Accelerator Access Rights
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 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 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 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**

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


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. Additional report rights are also required to view, edit, or run reports.

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 you to access resource management pages.

Type: Global
Resource - View - All

Lets you view information, except the financial properties of all resources.

Type: Global

Resource - View Book - All

Lets you view bookings for all resources.

Type: Global

Resource - View Financial - All

Lets you view financial properties for all resources. The right is dependent on being granted the Resource - Navigate right.

Type: Global