



# Revive the ePMO with Clarity

A Webinar Series

## Clarity Security Made Simple Sustainable

Ming Cheung, Solution Engineer



**UNITE THE  
ENTERPRISE  
AND REVIVE  
THE ePMO  
WITH  
CLARITY.**



# Welcome to the Revive Webinar Series

- Change is happening. This series is about:
  - Understanding the adoption gaps transformation creates
  - Sharing insightful ways others have assessed options and taken action
  - Demonstrating practical solution enhancements recommendations
- Objective: Clarity stakeholders on the right side of transformation

## Today's Session:

### Clarity Security Made Simple Sustainable



Ming Cheung  
Solution Engineer

From project information to financials to resource details to strategies, the ePMO owns a lot of information about an organization and Clarity is the solution of choice to bring it all together to make effective, data-driven portfolio decisions. How can we develop and maintain an access model that will allow the right level of *agility* while provide good *governance*. The answer is not simple, but understanding the fundamentals of how security works in Clarity will guide the ePMO to get the most value out of the solution.

# Today's Agenda

- Clarity Security Basics
- How the Modern UX Revamped Security
- Recent Changes to Clarity Security
- Persona based Use Case Samples

Given the complexity of the topic, today's session will focus on slides rather than a live demo. This topic also spans multiple releases of the product, wherever possible, an indication of when the change occurred so that you can plan for the functionality being available.

## Tip #1



Do not modify security groups on-the-fly, make sure you Model – Test – Deploy to ensure you get what you expect





# Clarity Security Basics

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# Clarity Security Basics

## 3 types of Licenses

- Full Function
- Restricted
- Read-Only

License types and security rights are linked, with each security right in the system aligned to a type of license. Understanding how rights are aligned to the license types can help customers right-size their license consumption.

Where security rights are applied can have a large impact on the long-term supportability of the solution. There are many approaches, and all approaches have their merits, the key is finding a sustainable balance between governance and maintainability.

## 3 places to assign rights

- Resource
- Group
- OBS

## 3 + 1 Security Right Scopes

- Global
- OBS
- Instance + Inherent

Understanding the scope of the security right will help you determine under what instances you want to use a particular right and truly tailor the end user experience to what they need to do or see in the system.

# Security Rights and License Types

- **Full Function:** Aligns to *Managers* (Investment, Project, Resource, etc.) within the organization. Typically, responsible for the creation and upkeep of data in Clarity.
- **Restricted:** Aligns to *team members*. Ability to track effort against investments and edit key information such as Risks, Issues, etc.
- **Read-Only:** Aligns to *collaborators*. People who may have a vested interest in the work being done, approval or follow-ups on items.

License consumption is measured by the rights assigned to a user and the user accounts status in the system. A single **Full Function** security right will drive the license consumption up to Full.

STATUS

✓ Active

Inactive

Lock

LOCALE

English(United States)

Click on the License Type, then on the resource’s last name to see what security right is driving the license count and where the user is getting the right from.

Use the *Rights by License Type* portlet to see what type of license is consumed by each security right.

## License Information

User Count by License Type	
License Type ▲	User Count
Full	60
Restricted	39
View Only	1
Total Licenses	100

Displaying 1 - 3 of 3

> Rights by License Type		
Access Right ▲	Description	License Type
Account Settings - Navigate	Allows Access to the Account Settings page	View Only
Accounts Receivable Transaction - XOG Access	Allows user to import and export Accounts Receivable Transaction instances using the XML Open Gateway interface.	Full
Action Item approval - XOG Access	Allows user to export and approve action items using the XML Open Gateway interface.	Full
Actual Value - Copy	Allows the user to copy Actual Value instances in the new user experience for which the user has access.	Restricted
Actual Value - Create	Allows resource to create Actual Value objects.	Restricted

# Scope of Access Rights

- **Global:** Provides unlimited access to an object, for example, all projects rather than a specific project.
- **Organizational Breakdown Structure (OBS):** Provides access rights to all instances in the selected OBS Unit.
- **Instance:** Provides access to a specific object instance. For instance, a specific project, rather than all projects.

- **Inherent Rights:** Automatically granted when a resource is assigned a role or a user performs a certain action
  - A resource added to the manager attribute on an investment is granted the *Project – Manager (Auto)* right.
  - A resource that creates a risk is granted the *Risk – Edit (Auto)* instance right on the risk they created.

A clean installation of Clarity comes with ~700 global access rights, covering these general areas:

- **User Interface Navigation Rights**
  - *Projects – Navigate, Ideas – Navigate* (Global)
- **View, Create, Edit, Delete rights for object instances**
  - *Projects – Create, Ideas – Create* (Global)
  - *Project – Edit* (Instance), *Projects – Edit All* (Global)
  - *Project – View* (Instance), *Projects – View All* (Global)
- **Application Functionality related to Object Instances**
  - *Project – Approve* (Instance)
  - *Project – Schedule in Browser* (Global)
- **Administrative functions**
  - *Administration – Application Setup, Administration – Studio* (Global)
- **Programming and integration rights**
  - *API – Access, Project – XOG Access*



# Where to Assign Rights and the Scope of Rights

An arbitrary set of users can be grouped into a Security Group and given a right



Users that are already grouped together by the OBS they are in, a right could be given to an OBS grouping of users



A specific single user who can be given specific rights in the system



**OBS Rights**

Rights to instances that belong to a particular OBS structure (i.e., all investments belonging to IT and child organizations)

**Global Rights**

Rights that apply to all portions of the system (i.e. View all Portlets, view all Resources)

**Instance Rights**

Rights to a specific instance of an object (i.e. view a specific portlet)

**Inherent Rights**

Rights provided to a Resource when they are defined as the manager of an instance

# Inherent (Auto-Access) Rights In Clarity

- Auto-Access rights are granted automatically when you are assigned to a role or perform a certain action.

Access Right	Description
Resource – Self (Auto)	Rights automatically granted to a resource when created. Includes Resource - Edit Ideas.
<CIT Name> – Edit	Allows creator of CIT to edit the resulting custom investment type.
Idea – Initiator (Auto)	Automatic right that is granted to the initiator of an idea.
Idea – Manager (Auto)	Automatic right that is granted to the manager of an idea.
<NPIO> – Manager (Auto)	Automatic right that is granted to the manager of NPIOs (Application, Asset, Other Work, Product, Service)
Resource – Manager (Auto)	The user creating a new resource is automatically granted this right. The user becomes the resource manager for the resource. This right allows the user to view and edit general resource properties. If the resource is assigned another resource manager, the current resource manager loses rights to the resource.
Project – Manager (Auto)	The user who enables a project for management is automatically granted this right. The user becomes the Project Manager for the project. This right allows a user to view and edit the general and management properties of the project. The access right allows the user to edit only some limited financial fields.
Job Type Creator (Auto)	This right is automatically granted to the creator of a job type when it is created.












# Recent (and some not so recent) Changes to Clarity Security

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# Modern UX Navigation Menu

Every menu item in the modern UX can be provisioned/hidden via access rights. Here are the menu items and the associated access right:

	<b>Home:</b> Cannot be hidden, links to default landing page
	<b>Project Tiles:</b> Project Management – Tiles Navigate
	<b>Projects:</b> Project Management – Navigate
	<b>Ideas:</b> Idea Management – Navigate
	<b>Investments:</b> Custom Investment – Navigate (additional rights required)
	<b>Pages:</b> Page – Navigate
	<b>Custom Objects:</b> Custom Object – Navigate
	<b>Status Reports:</b> Status Reports - Navigate
	<b>My Workspace:</b> My Workspace



<b>Tasks:</b>	Tasks – Navigate
<b>To Dos:</b>	To Do – Navigate
<b>Hierarchies:</b>	Hierarchy – Navigate
<b>Agreements:</b>	Agreement – Navigate
<b>Roadmaps:</b>	Roadmap – Navigate
<b>Plans:</b>	Plans - Navigate
<b>Transactions:</b>	Transactions - Navigate
<b>Staffing:</b>	Staffing – Navigate
<b>Resources:</b>	Resource Management – Navigate
<b>Timesheets:</b>	Timesheets – Navigate (Also hidden if Timesheets are not activated in System Options)
<b>Menu Links:</b>	Menu Links – Navigate
<b>Administration:</b>	Admin – Access (additional rights Required)
<b>Classic PPM:</b>	Classic PPM – Navigate



**Staffing Plan:** Staffing Plan – Navigate (Deprecated in 16.1.2)

# Custom Investment Type Access Rights

- Other than the navigation rights, the introduction of custom investment types introduced a new set of security rights (20) every time a custom investment is defined in Clarity Studio.
  - <CIT Name> - Benefit Plan – Edit
  - <CIT Name> - Benefit Plan – View
  - <CIT Name> - Budget Plan – Approve
  - <CIT Name> - Budget Plan – Edit
  - <CIT Name> - Budget Plan – View
  - <CIT Name> - Cost Plan – Edit
  - <CIT Name> - Cost Plan – View
  - <CIT Name> - Create
  - <CIT Name> - Create from Template
  - <CIT Name> - Delete All
  - <CIT Name> - Edit
  - <CIT Name> - Financial Plan – Submit for Approval
  - <CIT Name> - Navigate
  - <CIT Name> - Risk, Issue Change Request - Create
  - <CIT Name> - Risk, Issue Change Request - Delete
  - <CIT Name> - Risk, Issue Change Request - Edit
  - <CIT Name> - Risk, Issue Change Request - View
  - <CIT Name> - Task Management
  - <CIT Name> - View
  - <CIT Name> - XOG Access
- Security right names are not exactly as they appear in this list as the names vary depending on the type of right: Global, OBS or Instance



# Roadmap Access Rights

Access Right	Capability	Clarity Rights	Notes
Roadmap – Navigate Global access	Hide/Show menu Icon	<b>Global:</b> Roadmap – Navigate	Hides and shows the Roadmap menu navigation icon
Roadmap – Create Global access	CREATE a new Roadmap	<b>Global:</b> Roadmap – Author - All	Allows user to create Roadmaps in the new user experience. The creator of the Roadmap automatically becomes the Author and can edit or delete the Roadmap
Roadmap – Author combined rights	VIEW Roadmaps EDIT Roadmaps DELETE Roadmaps	<b>Global:</b> Roadmap – Author – All <b>Instance:</b> Roadmap – Author	Allows the Roadmap Author to view, edit and delete the Roadmap and manage roadmap-specific picklists in the new user experience.
Roadmap – Edit	VIEW Roadmaps EDIT Roadmaps	<b>Global:</b> Roadmap – Edit – All <b>Instance:</b> Roadmap – Edit	Allows user to view and edit Roadmaps and manage roadmap-specific picklists in the new user experience.
Roadmap – Delete Includes View access, Instance, or Global access	DELETE Roadmap	<b>Global:</b> Roadmap – Delete – All <b>Instance:</b> Roadmap – Delete	Allows user to view and delete specific Roadmaps in the new user experience.
Roadmap – View	VIEW Roadmaps	<b>Global:</b> Roadmap – View – All <b>Instance:</b> Roadmap – View	Allows user to view Roadmaps in the new user experience.
<Investment> - Navigate	Controls the list of values displayed in the Investment Type pull-down within the multi-select Add grid	<b>Global:</b> <Investment> – Navigate	Allows visibility to <Investment> in order to import into the roadmap

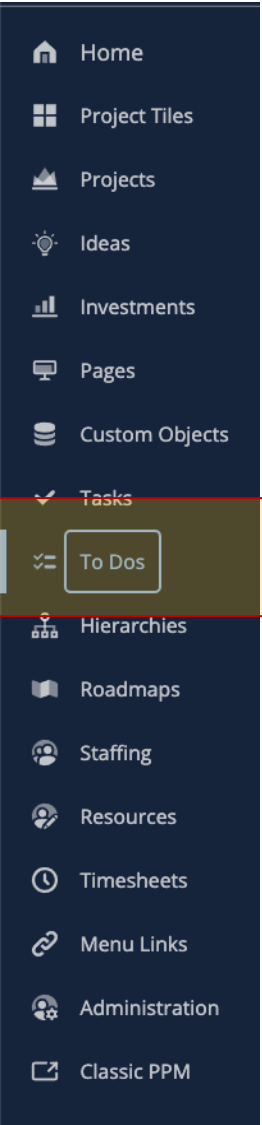
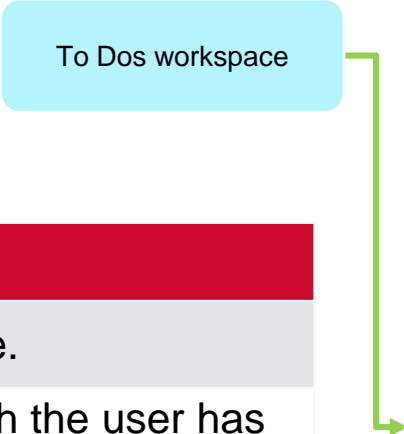
# Hierarchy Access Rights

Access Right	Capability	Clarity Rights	Notes
Hierarchy – Navigate Global access	Hide/Show menu Icon	<b>Global:</b> Hierarchy – Navigate	Hides and shows the Hierarchy menu navigation icon
Hierarchy – Create Global access	CREATE a new Hierarchy	<b>Global:</b> Hierarchy – Create	
Hierarchy – Edit Includes View access, Instance, or Global access	VIEW entire Hierarchy EDIT entire Hierarchy	<b>Global:</b> Hierarchy – Edit – All <b>Instance:</b> Hierarchy - Edit	Allows view information on the Hierarchy object instance Allows the user view access to the cards on the tree (Add/Import button should be hidden on the tree workspace) Allows the user to see ALL the nodes/investments on the even though s/he doesn't have view access to the investments on the tree
Hierarchy – View Global access	VIEW entire Hierarchy	<b>Global:</b> Hierarchy – View – All <b>Instance:</b> Hierarchy - View	
Hierarchy – Delete Includes View access, Instance, or Global access	DELETE entire Hierarchy	<b>Global:</b> Hierarchy – Delete – All <b>Instance:</b> Hierarchy - Delete	Allows delete the Hierarchy object instance
Hierarchy – Manage Metrics	Define custom aggregations and calculations for a Hierarchy	<b>Global:</b> Hierarchy – Manage Metrics	Allows user to create, update and delete Hierarchy Metrics.
<Investment> - Navigate	Controls the list of values displayed in the Investment Type pull-down within the multi-select Add grid	<b>Global:</b> <Investment> – Navigate	Allows visibility to <Investment> but no edit rights

# To Do Workspace Access Rights

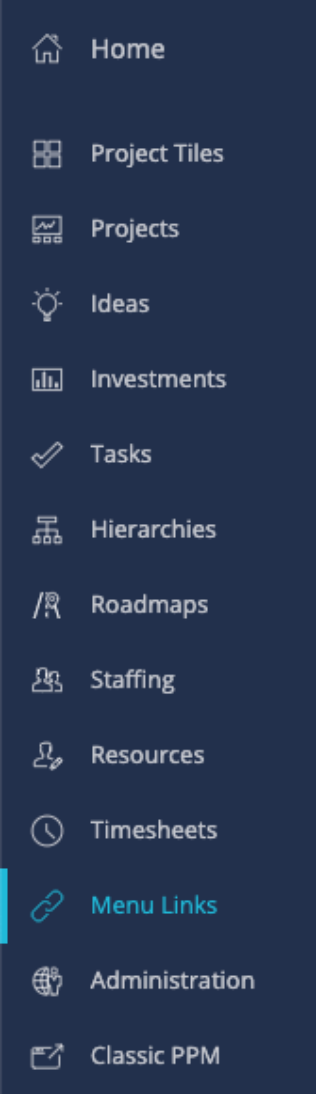
- “To Dos workspace” available from the Modern UX main navigation.
- To Dos security includes (5) new (Global) access rights:

Access Right	Description
To Do – Navigate	Allows user access to the To Do pages in the new user experience.
To Do – View All	Allows user to view all To Dos in the new user experience for which the user has access to view associated objects.
To Do – Create All	Allows user to create To Dos in the new user experience for which the user has access to view associated objects.
To Do – Edit All	Allows user to view and edit all To Dos in the new user experience for which the user has access to view associated objects.
To Do – Delete All	Allows user to delete all To Dos in the new user experience for which the user has access to view To Dos and to view associated objects.



*Note: Once a user is granted any of the above To Dos access rights, a “View only” Clarity license is consumed – which will be noted in the License Information portlet.*

# Menu Links Access Rights



- The following rights are required to access the Menu Links workspace

Access Right	Description
Menu Links – Navigate	Allows user to access the Menu Links page in the new user experience.
Menu Links – Create	Allows user to create new section and new links in new user experience. Includes Menu Links - View - All global access right.
Menu Links – Edit - All	Allows user to edit the sections and links in new user experience. Includes Menu Links - View - All global access right.
Menu Links – Delete - All	Allows user to delete sections and links in new user experience. Includes Menu Links - View - All global access right.
Menu Links – View - All	Allows user to view all sections and links in new user experience.

# Risks, Issues, Changes – Access Rights

- Risk security has changed – Edit & Create are now separate rights.
  - The ability to Create Risks was previously included with the Edit right.
  - The 4 new RICs rights for Projects, Ideas, Custom Investments are:
    - Create (does not include View of Risks created by others)
    - Delete – All
    - Edit – All
    - View – All

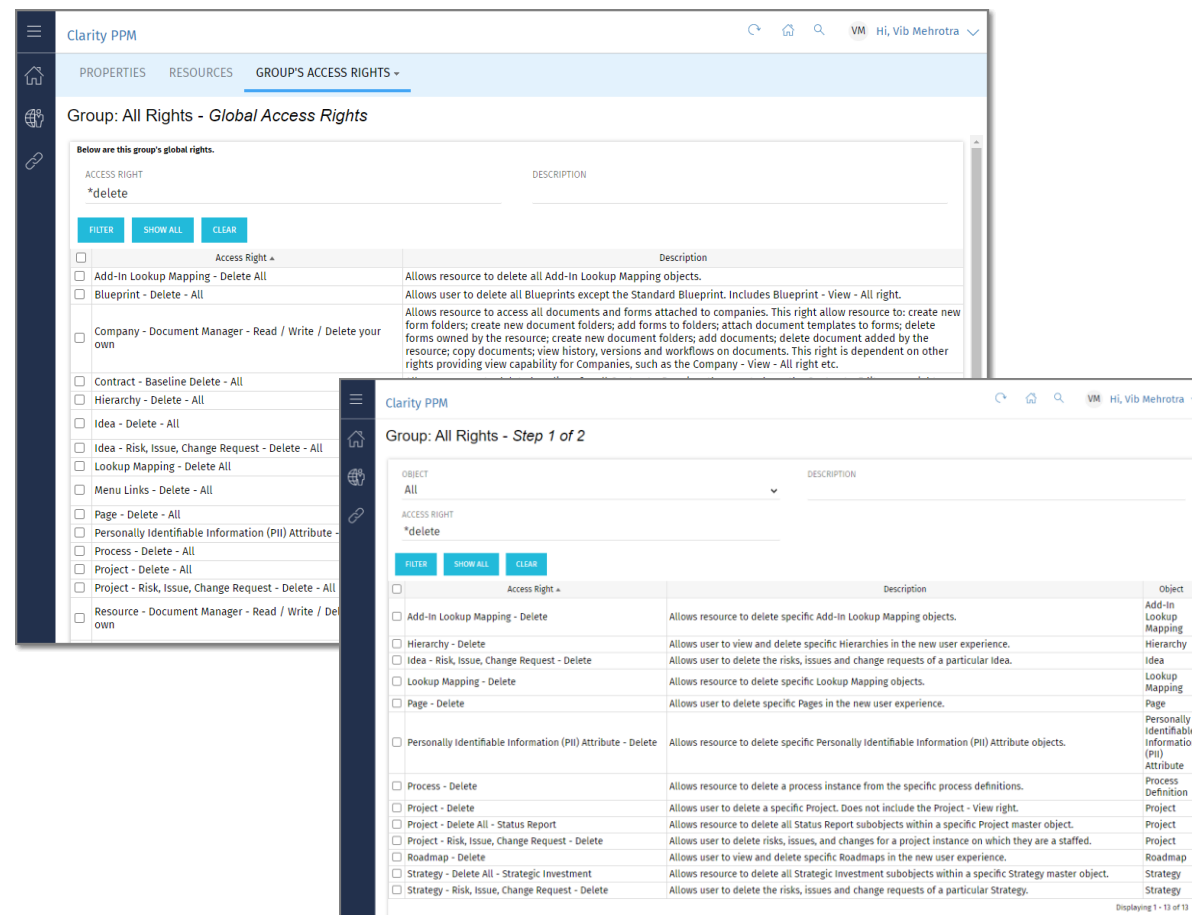
Access Right ▲	Description
Idea - Risk, Issue, Change Request - Create	Allows user to create Idea risks, issues and change requests.
Idea - Risk, Issue, Change Request - Delete - All	Allows user to delete all the Idea risks, issues and change requests.
Idea - Risk, Issue, Change Request - Edit - All	Allows user to edit and view all the Idea risks, issues and change requests.
Idea - Risk, Issue, Change Request - View - All	Allows user to view all the Idea risks, issues and change requests.

*Example – Idea Risk access rights*



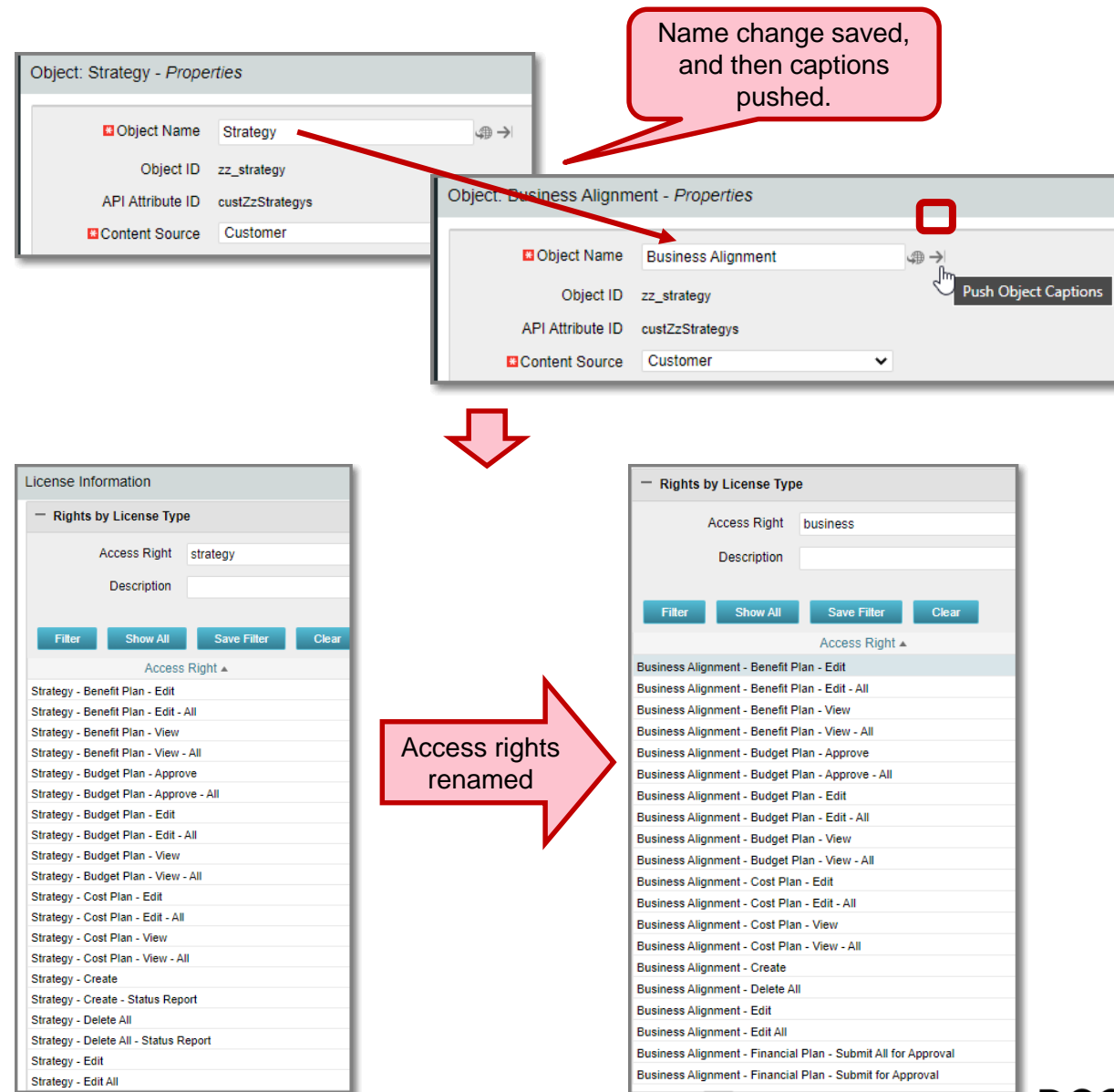
# Separate delete from edit permissions

- Customers can now segregate delete permissions from edit permissions.
  - In 15.9.1 and earlier, edit right allowed the user to edit and delete object instances.
  - 15.9.2 onwards edit will only allow them to make changes to the object instance. Delete right will be required to delete the instance.
- Every object now has the following new rights available:
  - Global Delete All
  - OBS Delete
  - Instance Delete



# Auto update of Access Right Name

- Customers that change the name of Custom Investment Types or Custom Objects can now update access right to reflect the new name.
- Updating of the access right is done from the object management in Studio.
- New “Push Object Captions” link to reflect the changes.
- Name changes are reflected in:
  - OBS rights
  - Instance Rights
  - Global Rights
  - Sub-object master object name.



# Disable auto granting instance rights via XOG and API

- New parameter added that will prevent auto assigning instance rights when creating a new instance using XOG or Rest API.
- This change is only for Custom Object instance creation.
- Instances created using the new parameter can only be viewed using global or OBS rights.
- Default behavior will be same as in the past to auto assign the instance right.
- New parameters set to false
  - assignInstanceRights="false"

```
<NikuDataBus xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation=
"../xsd/nikuxog_customObjectInstance.xsd">
  <Header action="write" externalSource="NIKU" objectType="customObjectInstance" version=
  "15.9.3.536"/>
  <customObjectInstances objectType="co_strategy">
    <instance instanceCode="ST-003" objectCode="co_strategy" assignInstanceRights="false">
      <CustomInformation>
        <ColumnValue name="partition_code">NIKU.ROOT</ColumnValue>
        <ColumnValue name="odf_period_start"/>
        <ColumnValue name="odf_period_end"/>
        <ColumnValue name="name">Strategy 003</ColumnValue>
        <ColumnValue name="code">ST-003</ColumnValue>
        <ColumnValue name="page_layout">odf.co_strategyPr<
      </CustomInformation>
      <OBSAssocs complete="false"/>
      <Security/>
    </instance>
  </customObjectInstances>
</NikuDataBus>
```

Params Authorization Headers (11) Body Pre-request Script Tests Settings

none form-data x-www-form-urlencoded raw binary GraphQL JSON

```
1 { "_metadata": {
2   ... "directives": {
3     "assignInstanceRights": false
4   }
5 }
6
7 "d": [
8   {
9     "code": "STR-001",
10    "blueprintId": null,
11    "objectType": "co_strategy",
12    "name": "Market Growth"
13  }
14 ] }
```

clarity Strategy

Select All Deselect All

Group By

*Name ↑	*ID
<input type="checkbox"/> Growth in APJ	STR-004
<input type="checkbox"/> Market Growth	STR-001
<input type="checkbox"/> Revenue Generation	STR-002

INSTANCE RIGHT

Strategy - Edit

DESCRIPTION

Allows resource to edit specific Strategy objects.

> Filter: None

<input type="checkbox"/>	Name	ID
<input type="checkbox"/>	Growth in APJ	STR-004
<input type="checkbox"/>	Revenue Generation	STR-002

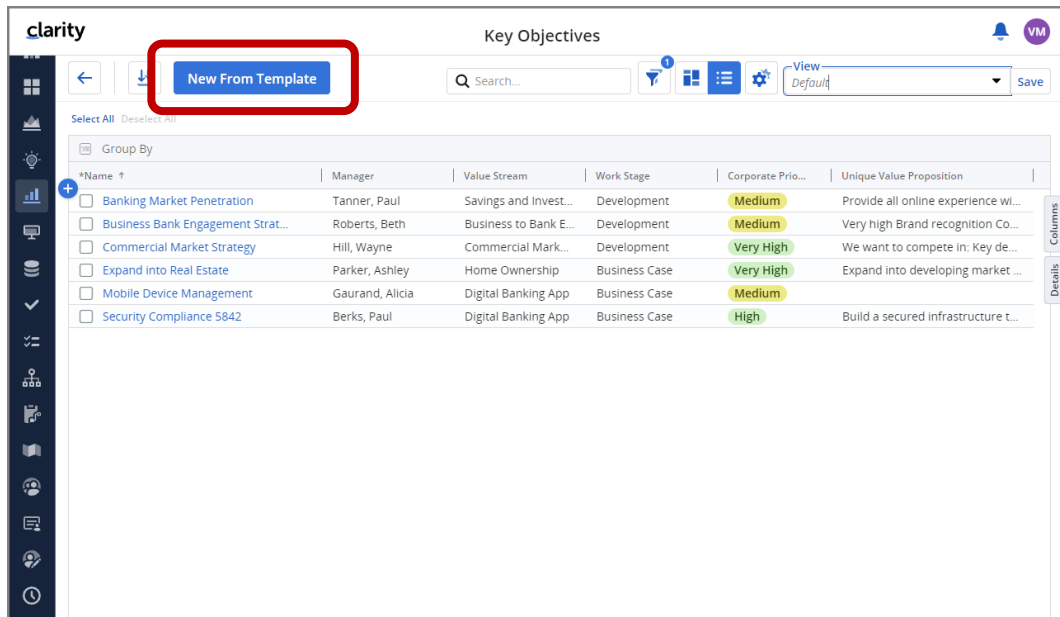
Displaying 1 - 2 of 2

# Project Creation Access Right

- In order to allow better control to customers on project creation we have made the following changes to project creation access rights:

Access Rights 15.9.2 and prior (OLD)	Access Rights starting 15.9.3 and higher (NEW)	Change	Grants access to create a project using following methods in Modern UX	Grants access to create a project using following methods in Classic UI
Project - Create from Template	Project - Create from Template	NO CHANGE.	<ul style="list-style-type: none"> <li>Using “New from Template” button to create new projects.</li> <li>Convert an Idea to Project</li> </ul>	<ul style="list-style-type: none"> <li>“New from Template” button</li> <li>Converting Idea to Project will only show Investment Type “Project from Template”</li> </ul>
Project - Create	Project - Create and Create from Template	NAME CHANGE ONLY	<ul style="list-style-type: none"> <li>Using “New from Template” button</li> <li>“+” button in Project Grid view</li> <li>“Insert Row Below” in Project Grid view</li> <li>“New card” button in Project Board view</li> <li>Convert an Idea to Project</li> </ul>	<ul style="list-style-type: none"> <li>“New” button</li> <li>“New from Template” button</li> <li>Converting Idea to Project will only show Investment Type “Project from Template” and “Project”</li> </ul>
	Project – Create	NEW ACCESS RIGHT	<ul style="list-style-type: none"> <li>“+” button in Project Grid view</li> <li>“Insert Row Below” in Project Grid view</li> <li>“New card” button in Project Board view</li> </ul>	<ul style="list-style-type: none"> <li>“New” button</li> <li>Converting Idea to Project will only show Investment Type “Project”</li> </ul>

# Create CITs from Template Access Right



- Following new access right will be available for all CITs.
  - <CIT Name> - Create From Template
- The new right is in addition to the existing create access right.
- The new access right will
  - Display the “New From Template” button within the CIT’ grid and board view.
  - Allow the users to create new CIT based on existing templates.
- To create new CIT using the “+” in grid or the “New Card” in board will require the existing “<CIT Name> - Create” access right.



# Agreements Access Rights

- Agreements come with the following access rights:
  - Agreement - Create
    - Allows user to create Agreements in the new user experience.
  - Agreement – Delete (and Delete All)
    - Allows user to view and delete specific Agreements in the new user experience.
  - Agreement – Edit (and Edit All)
    - Allows user to view and edit specific Agreements.
  - Agreement - Edit - All
    - Allows user to view and edit all Agreements.
  - Agreement - Navigate
    - Allows user access to the Agreement pages in the new user experience. The user will only be able to view information for Agreements to which the user has access.
  - Agreement – View (and View – All)
    - Allows user to view specific Agreements in the new user experience.

# Widgets Sharing Access Rights

Edit Pie Chart

Title \*  
Spend by Priority

Type \*  
Sum

Format  
☐ Number ☒ Percent

Group By \*  
Corporate Priority

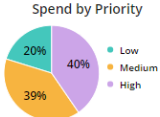
Sum \*  
Planned Cost

Sort Order  
☒ Descending ☐ Ascending

Only include items where... To include all items, do not add any filters.

Remove All ☒ Match All ☐ Match Any

☒ In Widget Library



Priority	Percentage
Low	20%
Medium	39%
High	40%

SAVE VIEW

View \*  
Default - Investment Summary

☒ Share with everyone

- New access right for managing widgets library:
  - Widgets – Manage Widget Library
- Users with the widget library access right can add their created widgets to the library.
  - Widgets in a “Widget Library” is visible to all users.
- Users can also define widgets and save them in their views.
- Saved Views shared with others, will also share the widget within that view.
  - View shared using “Saved View” will only appear in the creator’s “My Widgets”. Other users will not see them in “My Widgets” or “Widget Library”.

# Create Ideas from Template Access Right

▼ Rights by License Type

ACCESS RIGHT	LICENSE TYPE
ideas - create	All
DESCRIPTION	
<div>FILTER SHOW ALL SAVE FILTER CLEAR</div>	
Access Right ▲	Description
Ideas - Create	Allows user to create Ideas. Includes the Ideas - Navigate right.
Ideas - Create from Template	Allows user to create Ideas from templates.

- Following new access right will be available to grant to end users.
  - Ideas - Create from Template
- The new right is in addition to the existing create access right.
- The new access right will
  - Display the “New From Template” button within the Idea grid and board view.
  - Allow the users to create new Idea based on existing templates.
- To create new Idea using the “+” in grid or the “New Card” in board will require the existing “Ideas - Create” access right.

clarity Ideas

New From Template

Select All Deselect All

Group	Subject *	Tem...	Status *	Idea Pr...	Corporate P...
> Approved			Approved		
> Submitted for Approval			Submitted for A...		
▼ Unapproved			Unapproved		
	<input type="checkbox"/> Airport Access Security	<input type="checkbox"/>	Unapproved	High	High
	<input type="checkbox"/> Bundle Mobile Devices	<input type="checkbox"/>	Unapproved	Low	Low
	<input type="checkbox"/> Datamart Performance Upgrade	<input type="checkbox"/>	Unapproved	Medi...	Medium
	<input type="checkbox"/> Datasecurity for BYOD	<input type="checkbox"/>	Unapproved	Medi...	High
	<input type="checkbox"/> Lost Device Service	<input type="checkbox"/>	Unapproved	Medi...	Medium
	<input type="checkbox"/> Mobile Environmental Testing	<input type="checkbox"/>	Unapproved	Medi...	Medium
	<input type="checkbox"/> Mobile Initiative for EMEA	<input type="checkbox"/>	Unapproved	High	Very High
	<input type="checkbox"/> Network Monitoring Upgrade	<input type="checkbox"/>	Unapproved	Medi...	Medium
	<input type="checkbox"/> On the Road Planner	<input type="checkbox"/>	Unapproved	High	High

# Auto Assigned Right License Calculation

- Historically if a user is auto assigned right based on their name being populated in a Clarity field, such as Manager of a Project, then those user would be treated as “Full Functional” user since they get edit rights.
- Starting 16.0.1 we are changing all auto assigned rights to be treated as “View Only”.
  - No functional impact based on this change.
- Users will be tracked as Full or Restricted based on manually assigned rights.

The image displays two screenshots of the Clarity PPM 'License Information' page. The top screenshot shows the 'Full' license type for several auto-assigned rights, while the bottom screenshot shows the 'View Only' license type for the same rights, illustrating the change in version 16.0.1.

Access Right	Description	License Type
Application - Manager (Auto)	This right is equivalent to Application - Edit, and is automatically granted to the Application Manager.	Full
Asset - Manager (Auto)	This right is equivalent to Asset - Edit, and is automatically granted to the Asset Manager.	Full
Contract - Manager (Auto)	Automatic right granted to the manager of a specific Contract. Includes the ability to edit and delete CWBS Elements, Control Accounts, SLPPs and Work Packages on a specific Contract.	Full
Control Account - Manager (Auto)	Automatic right granted to the manager of a specific Control Account. Includes ability to create, edit and delete Work Packages on a specific Control Account.	Full
Hierarchy - Creator (Auto)	Allows the Hierarchy creator to view, edit and delete the Hierarchy in the new user experience.	Full
Idea - Initiator (Auto)	Automatic right granted to the initiator of a Idea	View Only
Idea - Manager (Auto)	Automatic right granted to the manager of a Idea	View Only
Job Type Creator (Auto)	This right is automatically granted to the creator of a Job Type when it is created.	View Only
Page - Creator (Auto)	Allows the Page creator to view, edit and delete the Page in the new user experience.	View Only
Page Creator (Auto)	Allows user to edit page.	View Only
Portfolio - Owner (Auto)	Automatic right granted to an owner of a Portfolio.	View Only
Portfolio - Stakeholder (Auto)	Automatic right granted to a stakeholder of a Portfolio.	View Only
Portlet Creator (Auto)	Allows user to edit portlet.	View Only
Product - Manager (Auto)	Allows user to baseline all Products. Does not include the Product - Navigate right, and requires the user to have the Product - Edit right.	View Only
Project - Discussion Manager (Auto)	This right is automatically created for the user who creates a project. It makes the creator of the project the collaboration manager. The user can subsequently grant Collaboration Manager rights to additional resources or revoke this right by changing it to participant.	View Only
Project - Manager (Auto)	The user who enables a project for management is automatically granted this right. In other words, the user becomes the Project Manager for the project. It allows user to view and edit the general and management properties of the project.	View Only
Project - Participant (Auto)	A user assigned to a project as a project participant will automatically be assigned this right. The right allows the user access to Action Items, Project Calendar, Document Manager and Discussions.	View Only

# My Workspace Access Rights

- In order to use Checklist the following access rights are required:
  - My Workspace – Navigate
    - Grants the user access to navigate to “My Workspace” in Modern UX where they can manage their checklist or view shared checklists.
  - Checklist – Create
    - Allows user to create Checklists.
  - Checklist – Owner
    - Allows user to edit, view and delete a particular Checklist.
  - Checklist – Collaborator
    - Allows user to view a particular Checklist.



# New security group added for Checklists

- New security group is seeded into Clarity as follows:
  - Checklist Sharing
- Users with whom a checklist is shared are automatically added to this group.
- This group provides the capability to define which access rights should be automatically be given to a user when a checklist is shared with them.
- By default the following access rights are included in this group:
  - Checklist – Create
  - My Workspace – Navigate
  - Resource – View – All
  - To Do – Create – All
  - To Do – Delete – All
  - To Do – Edit – All
  - To Do – View – All
- Admins can change the default rights that should be assigned when sharing Checklists

# Change Custom sub-object license type

- As part of 16.0.2 we are making changes to how we determine license type based on access rights for sub-objects.
- View access rights to custom sub-object will continue to be tracked as “View Only” license type.
- Create, Delete, Edit, and XOG access rights will now be tracked as “Restricted”, instead of “Full”, license type.

<input type="checkbox"/>	Object ▲	ID	Description	Master Object
<input type="checkbox"/>	Objectives & Key Results	clr_okr		Strategy

Access Right ▲	Description	License Type
Objectives & Key Results - Create	Allows resource to create Objectives & Key Results objects.	Restricted
Objectives & Key Results - Delete	Allows resource to delete specific Objectives & Key Results objects.	Restricted
Objectives & Key Results - Delete All	Allows resource to delete all Objectives & Key Results objects.	Restricted
Objectives & Key Results - Edit	Allows resource to edit specific Objectives & Key Results objects.	Restricted
Objectives & Key Results - Edit All	Allows resource to edit all Objectives & Key Results objects. This includes the page navigation right.	Restricted
Objectives & Key Results - View	Allows resource to view specific Objectives & Key Results objects.	View Only
Objectives & Key Results - View All	Allows resource to view all Objectives & Key Results objects. This includes the page navigation right.	View Only
Objectives & Key Results - Xog Access	Allows user to import and export Objectives & Key Results instances using the XML Open Gateway interface.	Restricted

# Access Rights to permit Copying of Projects

- ‘Project - Copy’ global access right controls the access to the copy action

> Rights by License Type <span>⚙️</span>		
Access Right ▲	Description	License Type
Project - Copy	Allows the user to copy a Project in the new user experience.	Full

- Project Workspace: The action ‘Copy’ will appear Enabled or Disabled based on access
  - Additional permissions are required for the copy action to complete successfully
  - Locked projects cannot be copied

### Timeline

Right-Click Action Menu

### Board

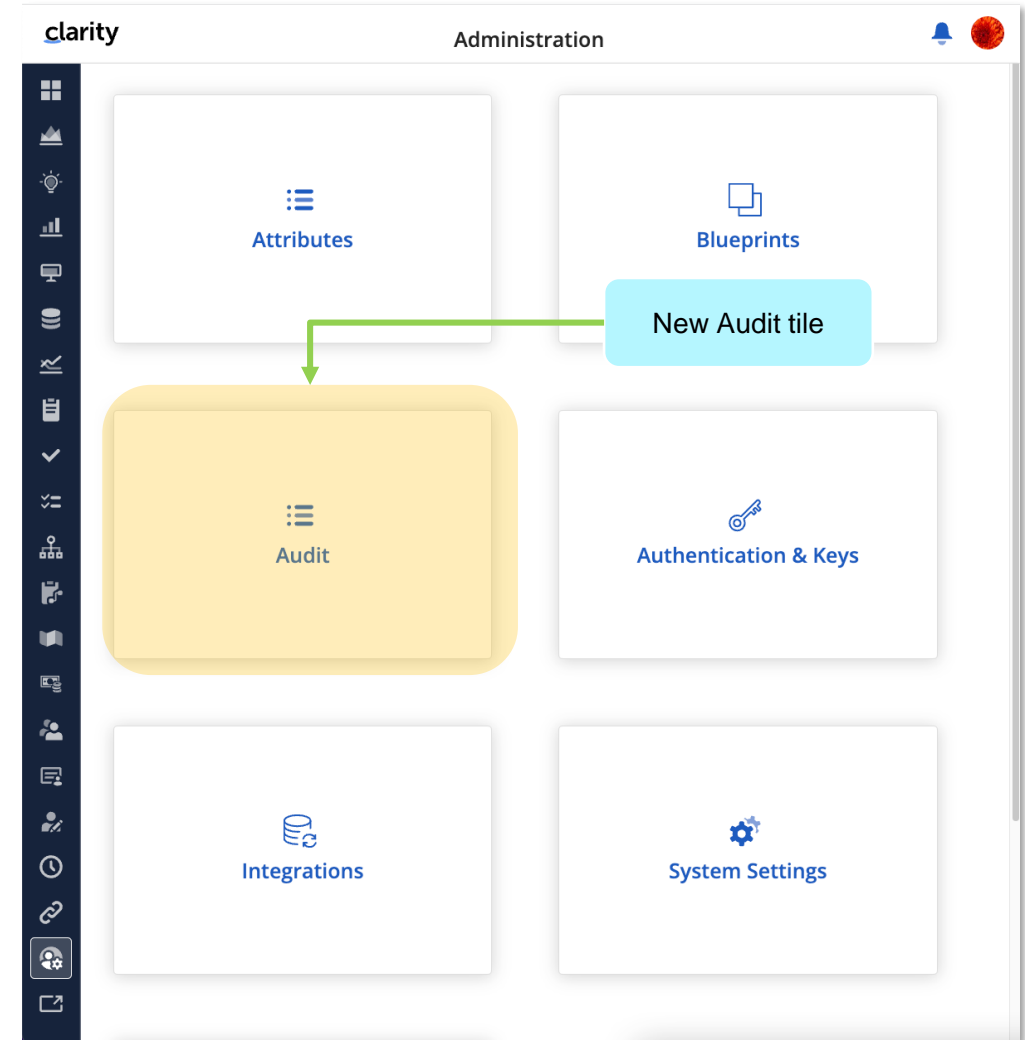
3-dot Action Menu

### Grid

Right-Click Action Menu

# Audit Information (Administration) Access Rights

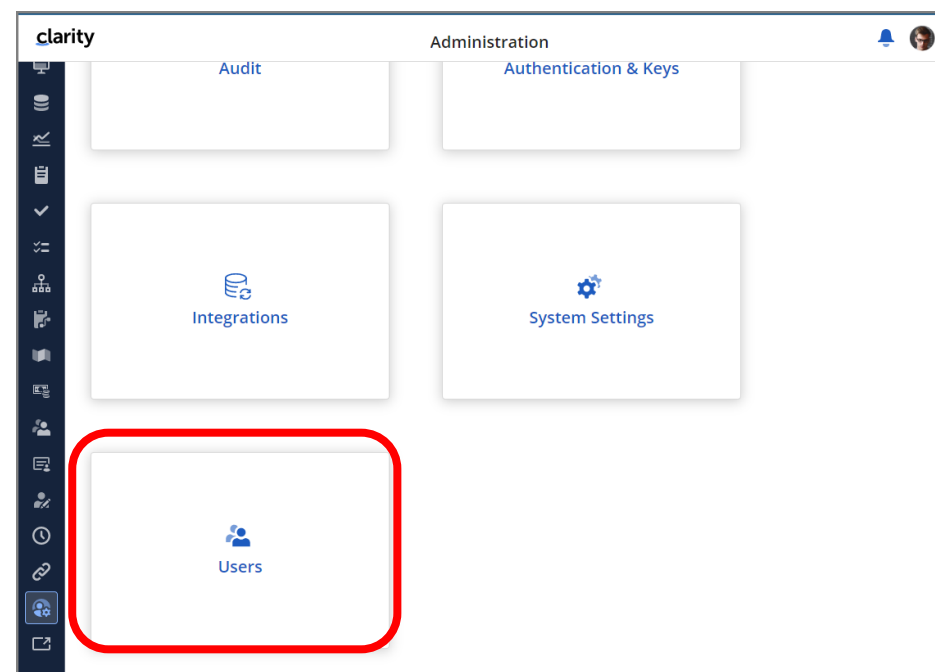
- A new 'Audit' tile provides users with Clarity audit information for 'audit enabled' objects.
  - Available from MUX > Administration
- A new user permission is required to view the Audit tile 'Administration - Audit - Navigate'.
- Once within MUX > Administration > Audit, users will also require the "Audit Trail – Access" right to view audit details.
- The method, from Classic, to enable audit for Clarity objects is not changing.
- In addition, the Classic (global) audit page remains in place
  - Administration > Data Administration > Audit Trail.



# New Access Right for User Administration in MUX

- “Users” management module in Modern UX is now GA.
- Following new access right is introduced as part of this feature to control which administrator can access this module.
  - Administration - Users – Navigate
- The new access right only controls which user can access this administration module in Modern UX.
- Users still require existing administration rights to create/manage users.

Access Right ▲	Description
Administration - Users - Navigate	Allows user access to Users under Administration in the new user experience. The user will only be able to view information for Users to which the user has access.



# View Management Functionality based on access right

- In prior release the “View – Administer” access right allowed the user to
  - create and edit Default Views
  - delete existing Views created by others
- Starting this release this access right will allow users to
  - create and edit **Recommended** Views
  - **share with groups**
  - delete existing Views created by others

Functionality	WITH “View – Administer” access	WITHOUT “View – Administer” access
Can see user created views (private and shared) under mine tab	✓	✓
Can favorite any views	✓	✓
Can see shared views that are shared with everyone or a access group that user belongs	✓	✓
Can share views created by the user with everyone	✓	✓
Can share views created by the user with access groups	✓	✗
Can set recommended flag on saved views	✓	✗
Can un-share a shared view	✓	✗
Delete views created by the user	✓	✓
Delete shared views created by others	✓	✗
Can share views created by others with everyone	✗	✗

# New Custom Object 'Copy' Access Rights

Studio allows the administrator to create 3 levels of Custom Objects.

Master 'Copy' rights are a Full license.

2<sup>nd</sup> & 3<sup>rd</sup> level object 'Copy' rights are a Restricted license .

Master Object

**Vendors - Copy**

Sub Object (Child)

**Vendor Contracts - Copy**

Sub-Sub Object (Grandchild)

**Contractors - Copy**

## Custom Objects

Vendors

Vendor Contracts

Contractors

## Investments & Custom Objects

Projects

Ideas

CITs

CIT

Technology  
Components

Capacity % -or- Strategy %

Assessment

- Common Custom Sub and Sub-Sub Objects can be created under the Common Investment object whereby the custom object is shared by all investment types
- Specific Custom Sub and Sub-Sub Objects can be created under a specific Investment object such as Ideas, Projects or CITs whereby the custom object is tied only to that investment type



# Separate Administration Navigation Access Rights

Separate rights for the Administration Menu and individual rights for each Tile with full access to manage the data within the tile.

Classic Administration Access Rights		Clarity Administration Access Rights
Administration - Access		Administration - Navigate
Administration - Authorization		* Administration - Attributes - Navigate
Administration - Application Setup		Administration - Blueprints - Navigate ❖ Plus 'Blueprint' access rights to manage blueprints
Administration - Resources		Administration - Action Items - Navigate
Administration - Studio		Administration - Audit - Navigate
... plus additional administration rights		Administration - Authentication & Keys - Navigate ❖ Plus 'API - Access' access right for 'Keys' tab
		* Administration - Integrations - Navigate
		Administration - Notifications - Navigate
		Administration - System Settings - Navigate ❖ Plus 'Page - View' access right to configure Custom 'Homepages'
		Administration - Users - Navigate

\* Existing Access Right - name change



# How the Modern UX Revamped Security

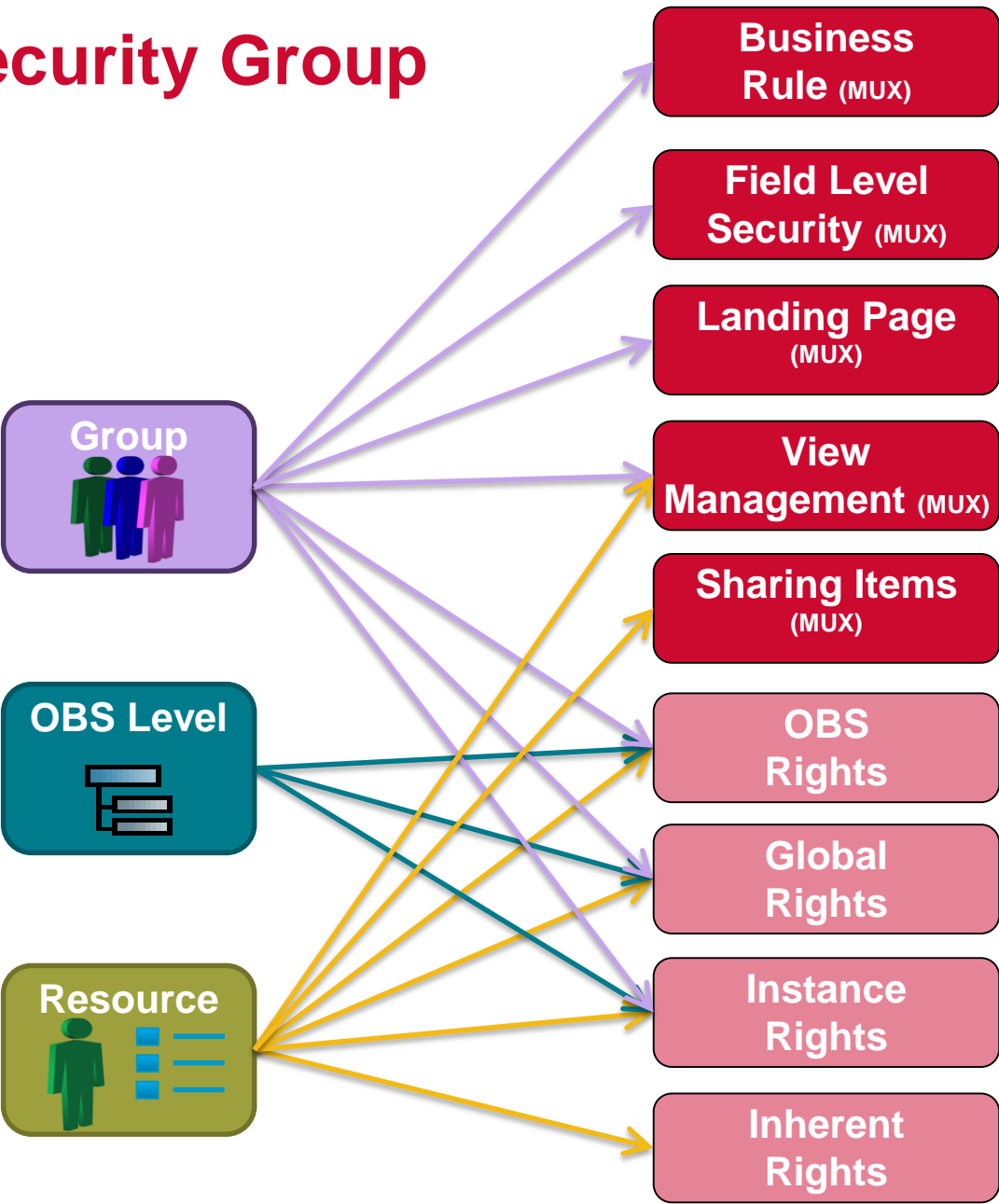


# Expanding Security Group Usage

An arbitrary set of users can be grouped into a Security Group and given a right

Users that are already grouped together by the OBS they are in, a right could be given to an OBS grouping of users

A specific single user who can be given specific rights in the system



- Enable module and section rights based specific to a blueprint based on user security group
- Allows system administrators to define which attributes are available based on a resource's security group
- Controls view and edit access on individual attributes on Investments, Custom Objects and Sub-Objects
- Target Modern User Experience landing pages based on membership in a security group
- Tailor exclusive views for a user community based on a security group or an individual
- Share Roadmaps, Checklists with other users in the system
- Rights to instances that belong to a particular OBS structure (i.e., all investments belonging to IT and child organizations)
- Rights that apply to all portions of the system (i.e. View all Portlets, view all Resources)
- Rights to a specific instance of an object (i.e. view a specific portlet)
- Rights provided to a Resource when they are defined as the manager of an instance (Consumes Read-Only license as-of 16.0.1)

# Security Groups in Business Rules Conditions

Conditions ☒ Always True

Match Filters **All** Any

Access Groups Select x + Add Filter Remove All

Is Equal To v

Search...

Clear Selected

- ☐ Access to CA PPM Studio
- ☐ Administration - XOG
- ☐ Administrator - All Rights
- ☐ Application Administrator
- ☐ Basic group for user access
- ☐ Checklist Sharing
- ☐ Company Creator
- ☐ Company Manager



Conditions

Add Conditions v

Work Status Select x

Is Equal To v

Search...

Clear All

- ☐ Requested
- ☐ Active
- ☐ On Hold
- ☐ Cancelled
- ☐ Complete

Is Equal To

- Is Not Equal To
- Is Empty
- Is Not Empty



☒ Match All ☐ Match Any

- Condition can use security groups.

- Condition can be defined based on attribute value:
  - Is equal to
  - Not equal to
  - Empty
  - Not empty
- Multiple Security Groups can be selected

- Ability to control if all or any conditions are met.

## Tip #2



Do not rely on business rules to replace security rights, blueprints (and associated business rules) can be easily changed

# Security Groups to Provide Field Level Security

Clarity PPM

VM Hi, Vib

Attributes

Blueprints

Clarity PPM

Attributes

VIEW UNSAVED Standard Attribute List View

Group By

Attribute	Attribute ID	Object	Secure	Access Edit	Access View	Database
Planned Operating Cost	planned_c...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Budgeted Cost Finish	budget_cst...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Planned Capital Cost	planned_c...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Planned Cost	planned_c...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Budgeted Cost	budget_cst...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Budgeted Operating Cost	budget_cst...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Planned Cost Start	planned_c...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Planned Cost Finish	planned_c...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Budgeted Cost Start	budget_cst...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Projected Cost Variance	obj_cost_a...	Project	✓	Admin ALL Access	Financial Manager	fin_fi
Planned Operating Cost	planned_c...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Budgeted Cost Finish	budget_cst...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Planned Capital Cost	planned_c...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Planned Cost	planned_c...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Budgeted Cost	budget_cst...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Budgeted Operating Cost	budget_cst...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Planned Cost Start	planned_c...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Planned Cost Finish	planned_c...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Budgeted Cost Start	budget_cst...	Idea	✓	Admin ALL Access	Admin ALL Access; Financial Manager	fin_fi
Use System Total Cost of Capital Rate	is_sys_val_f...	Project			Admin ALL Access; Financial Manager	fin_fi
ETC (Cost)	ev_etc	Project			Admin ALL Access; Financial Manager	prj_e

- “Attributes” tile available under the Modern UX administration.
- Access rights required to setup FLS
  - Administration - Access
  - Attributes Management – Navigate
- Attributes security is defined using common grid functionality.
- Access right is assigned to user groups only.

# Attribute security in Classic UI vs Modern UX

Classic UI	Modern UX
<ul style="list-style-type: none"><li>• Administrators can create views with attributes they want to secure.</li><li>• View display condition is set to only show to specified user group members.</li><li>• Any object based portlets could keep the attributes secured by setting the “Attribute Value Protection” (AVP) value to “Use display conditions and secured subpages to protect attribute values on this list”.</li><li>• Any query based portlets would not honor the view display condition.</li></ul>	<ul style="list-style-type: none"><li>• Administrators secure attributes individually in “Attributes”.</li><li>• Project and Idea attributes can be secured in a central place.</li><li>• Attributes are secured for view and edit access.</li><li>• Security is applied everywhere in Modern UX*.</li><li>• Any integration built using REST API should ensure to grant appropriate access to the integration user.</li></ul>

\* Currently Roadmap and Hierarchy do not follow FLS but that will be coming in the near future.

# Security Groups Define User Homepage

**“Add Page” button to define a new entry.**

**Ability to define Modern UX menu item or a page from pages.**

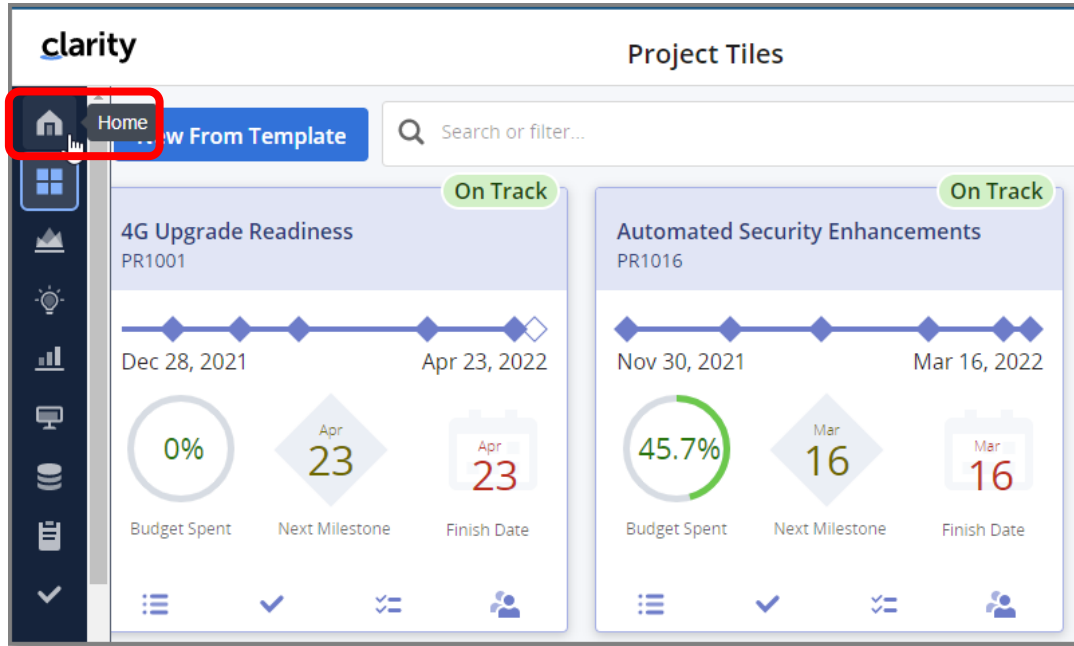
**Home pages defined per access group.**

Page	Access Groups
To Dos	PMO Team Member
Projects	PMO Project Manager; Project Manager
BI Dashboard	Financial Manager; PMO Financial Administrator
First Page in Menu	Default

**Select one or multiple user groups**



# User Homepage Details



- Homepage definition is not saved till the “Page” and “Access Group” are both populated.
- Once the homepage is defined then the user will always land on that page when they log into Clarity.
  - This will work for basic and SSO based login.
- User can click on the “Home” link to navigate to the defined homepage at anytime.
- User belonging to multiple user groups will get the homepage set to the page defined first on the list (top to bottom).

# Security Groups to Target Views

“Created by me”  
changed to “Mine”

“Default” view is  
now renamed to  
“Recommended”

Favorites uses  
“Starred” like icon

Specify if my view  
is shared.

Hover over will  
allow actions to  
“Share” or  
“Delete” the view

“Created by  
others” changed  
to “Shared”

Will list if the  
view is shared  
with everyone or  
specific groups

Mark shared view  
as favorite.

Hover over actions in  
“Shared” tab is only  
available if the user has  
“View – Administer”  
access right.

Shared view includes views  
created my me or others

Manage Views

Mine Shared

Q Search...

Favorite	Name	Modified	Shared	Recommended	Actions
★	All Active Projects	Oct 20, 2022		🔖	
★	Finance View	Mar 1, 2022		🔖	
	My Projects	Aug 20, 2021		🔖	

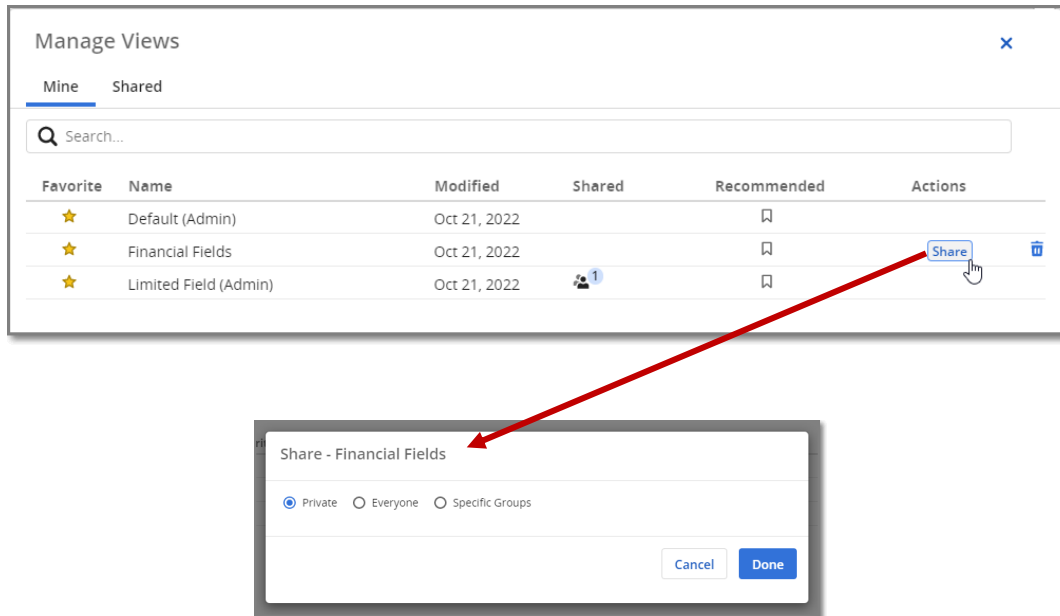
Manage View

Mine Shared

Q Search...

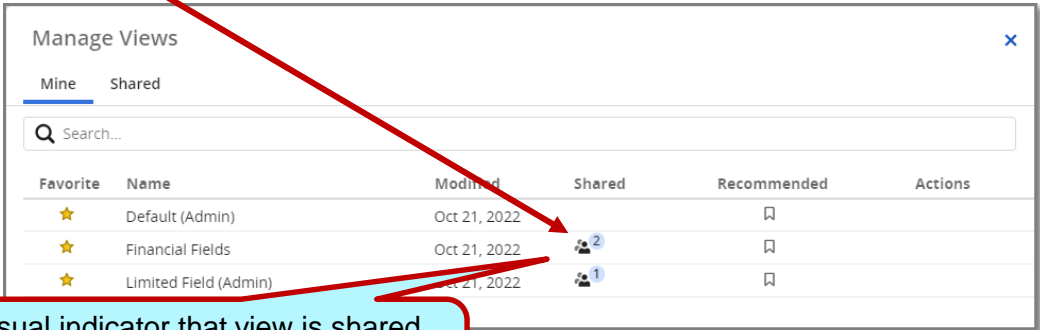
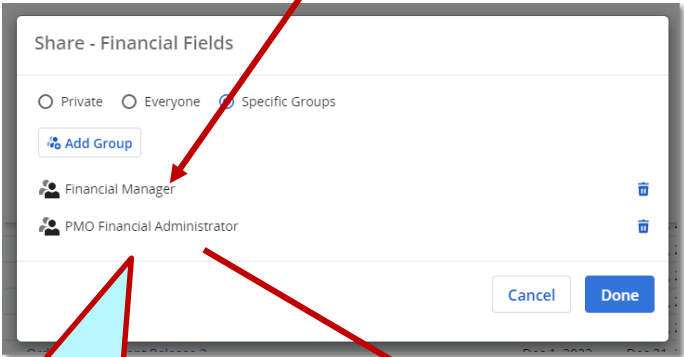
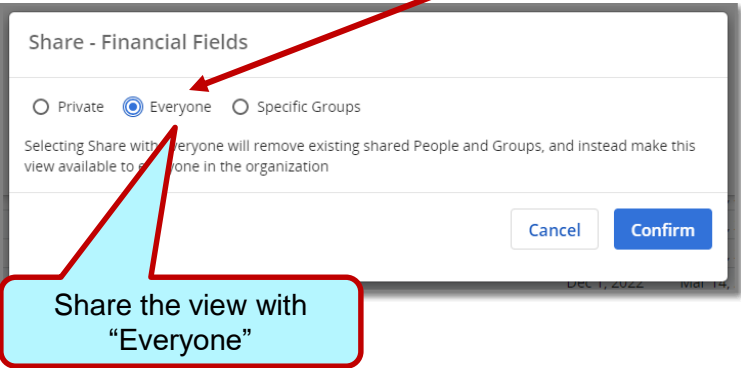
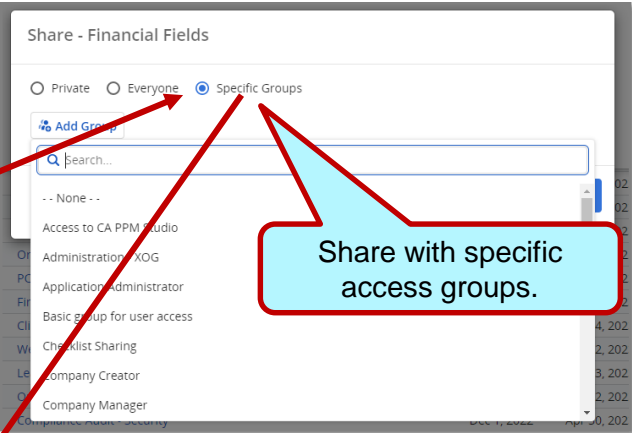
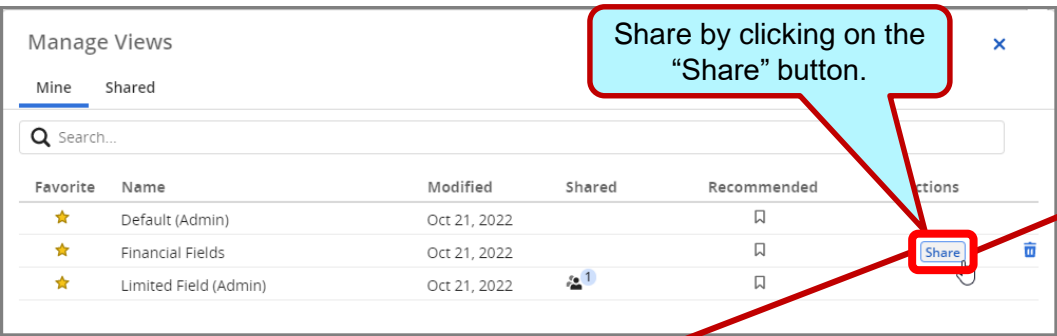
Favorite	Name	Modified	Owner	Shared	Recommend...	Actions
	All Projects	Aug 3, 2022	Ian Arpel	Everyone	🔖	
	Allocations ETC & Actuals	Oct 20, 2022	Ian Arpel	Everyone	🔖	
	Active and Inactive Proj...	Nov 11, 2020	Ian Arpel	Everyone	🔖	
	Compliance View	Jul 29, 2022	Ian Arpel	Everyone	🔖	
★	Cost and Benefit	May 11, 2022	Ian Arpel	Everyone	🔖	
	Documentation	Jul 29, 2022	Ian Arpel	Everyone	🔖	
★	Financial Forecast	Mar 3, 2022	Ian Arpel	Everyone	🔖	
	M&A Templates	Mar 7, 2022	Ian Arpel	Everyone	🔖	
	Marketing	Feb 9, 2022	Ian Arpel	Everyone	🔖	
	My Projects	May 11, 2022	Ian Arpel	Everyone	🔖	
	PMO Web Site View	May 20, 2021	Ian Arpel	Everyone	🔖	

# Available Actions for View Administrators



- View owners will see an Actions column under view manager's "Mine" tab.
- Users with "View – Administer" access will see Actions column under view manager's "Shared" tab
- Two possible actions available:
  - Share a view
  - Delete a view
- Share options include:
  - Keep the view **private** to the owner of the view.
  - Share the view with **everyone**.
  - Share the view with **specific groups**.

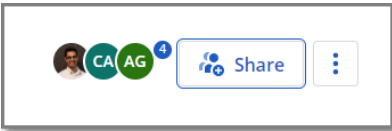
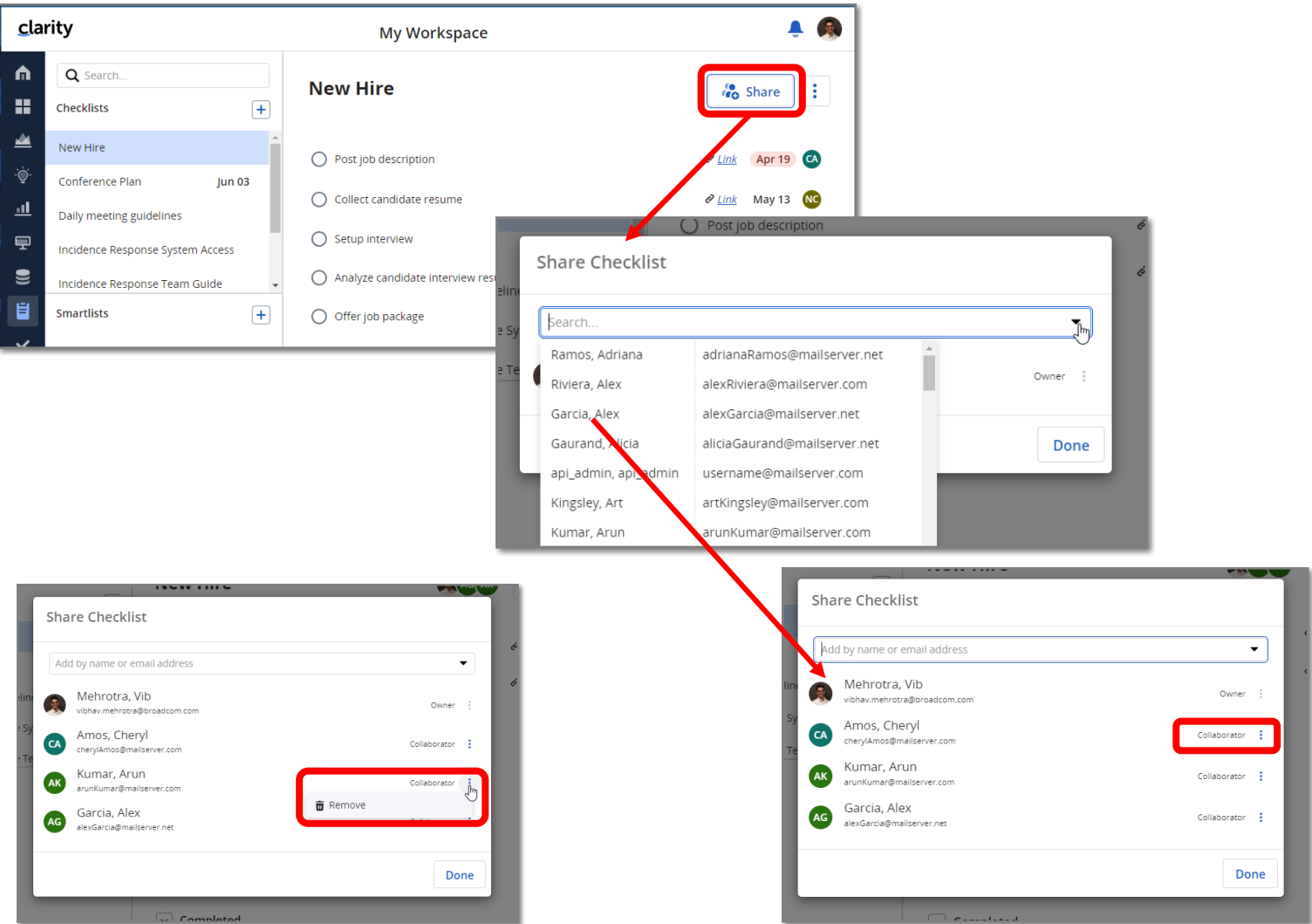
# Security Groups for Sharing Views



- Views can only be shared within the view manager.

# Security Group / Resource for Sharing Checklist

- Checklist can be shared with one or multiple users.
- Checklist can only be shared with users defined in Clarity.
- Collaborator names can be searched by name or email address
- Users with whom the checklist is shared are added as “Collaborators”
- Only owners can share a checklist with others or remove a collaborator
- Owner and collaborator avatar is displayed next to share button, along with total counter



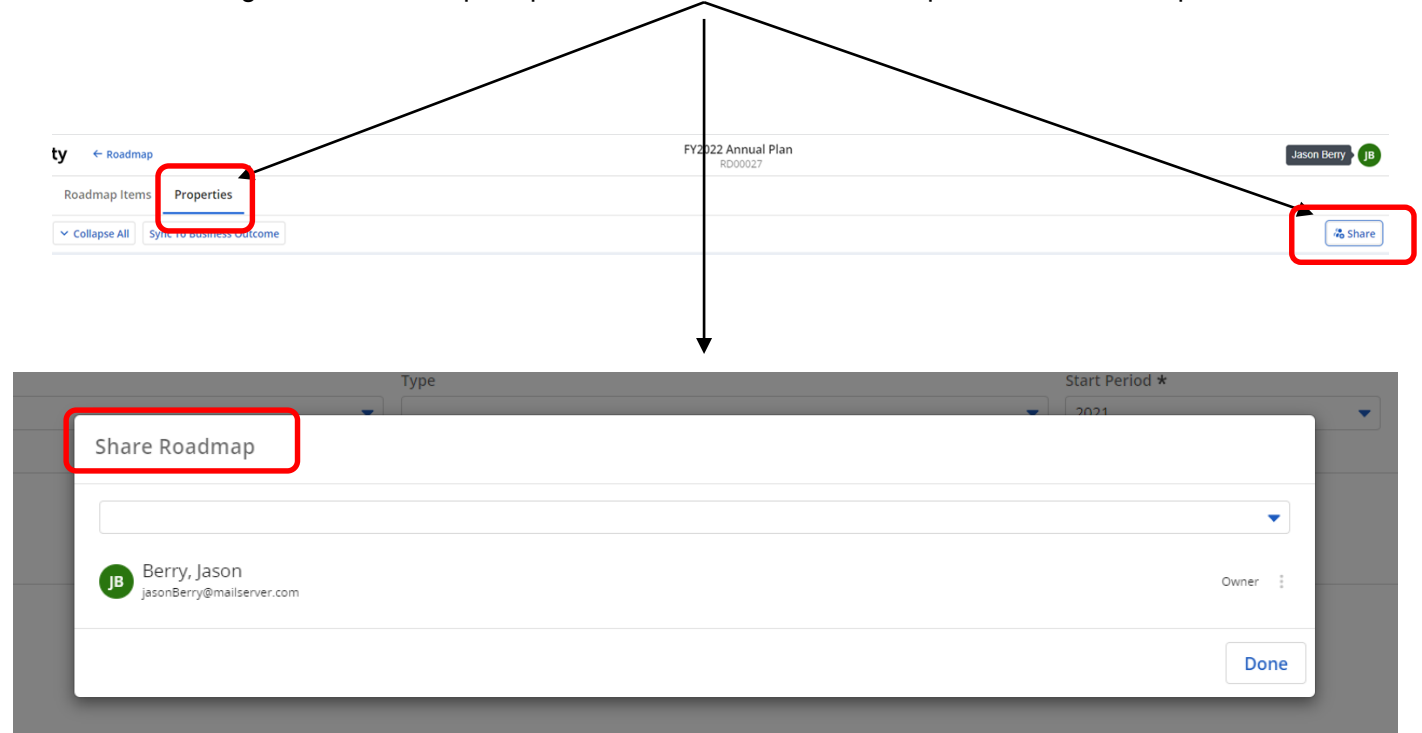
# When a View is Shared with another Resource

- When sharing a checklist with a collaborator the following will automatically happen:
  - Collaborator will be added to the system defined user group “Checklist Sharing”.
  - Collaborator will get global access rights as defined in the “Checklist Sharing” group.
- Collaborator can now do the following
  - Edit To Do within the shared checklist.
  - View Collaborators
  - Copy the checklist
  - Create their own checklist
- Only Checklist owner and collaborators can see their checklist. Other users will not see any checklist unless a checklist was shared with them.
- Adding a user as a owner of To Do does not automatically grant them access rights to see a To Do.

# Sharing Roadmaps with Security Groups / Resources

- In 16.0.3, we introduced 'Sharing Roadmap' functionality
- An 'Author' of the Roadmap can share the Roadmap
- 'Author' of the Roadmap can provide an 'Editor' or 'Viewer' access to shared user
- 'Author' navigates to a Roadmap Properties tab and click on Share to view the 'Share Roadmap' Modal window

'User navigates to Roadmap Properties tab and click 'Share' to open 'Share Roadmap' modal





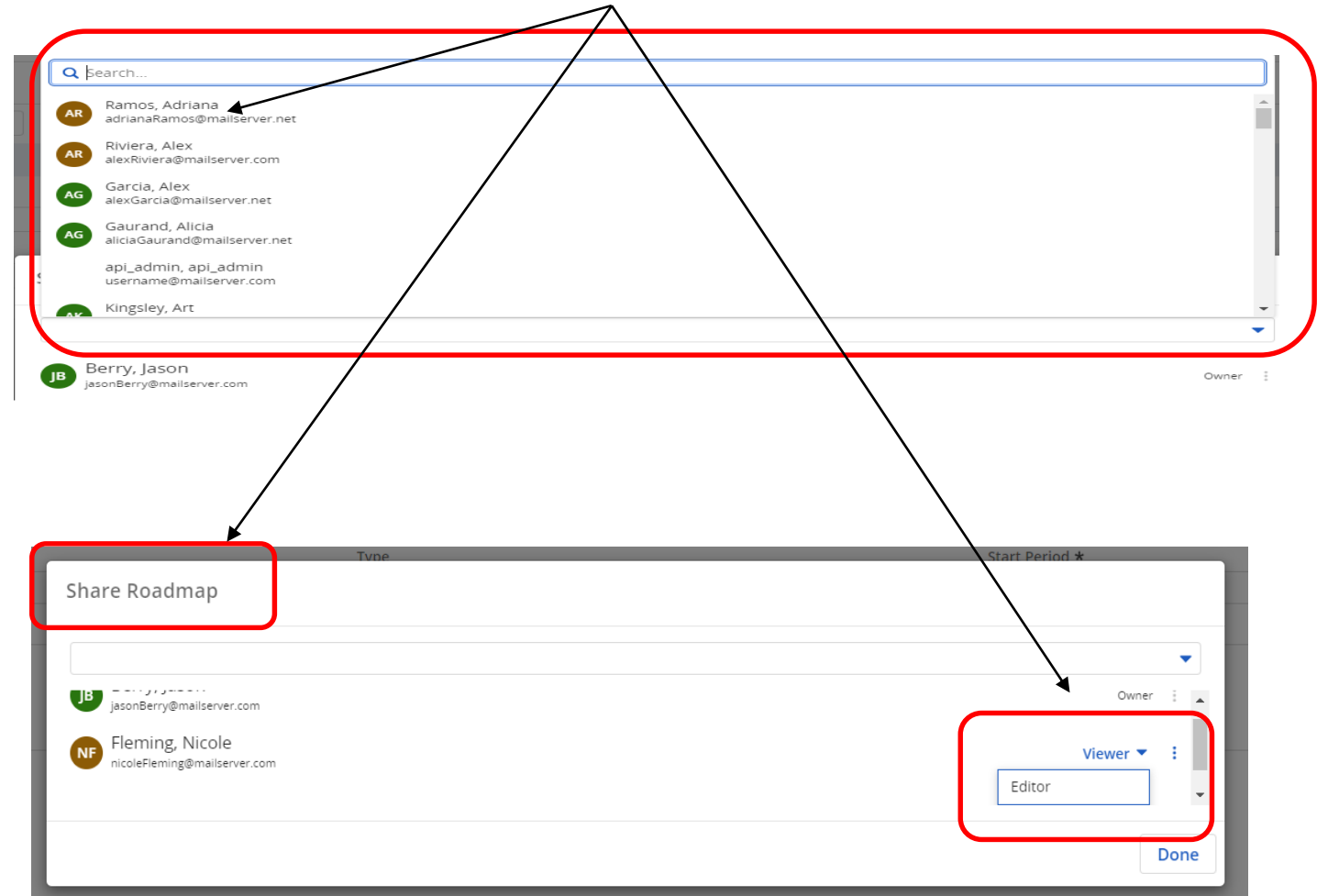
# Sharing Roadmaps – Access Rights Implications

## Sharing Roadmaps

- ‘Author’ of the Roadmap can grant access as ‘Editor or Viewer’ for a particular roadmap instance
  - Viewer will be granted – ‘Roadmap – View’ instance access right
  - Editor will be granted – ‘Roadmap – Edit’ instance access right

Indicates an elevation in license usage

‘Author’ can search and provide either ‘Editor’ or ‘Viewer’ instances rights to shared user





# Persona based Use Case Samples

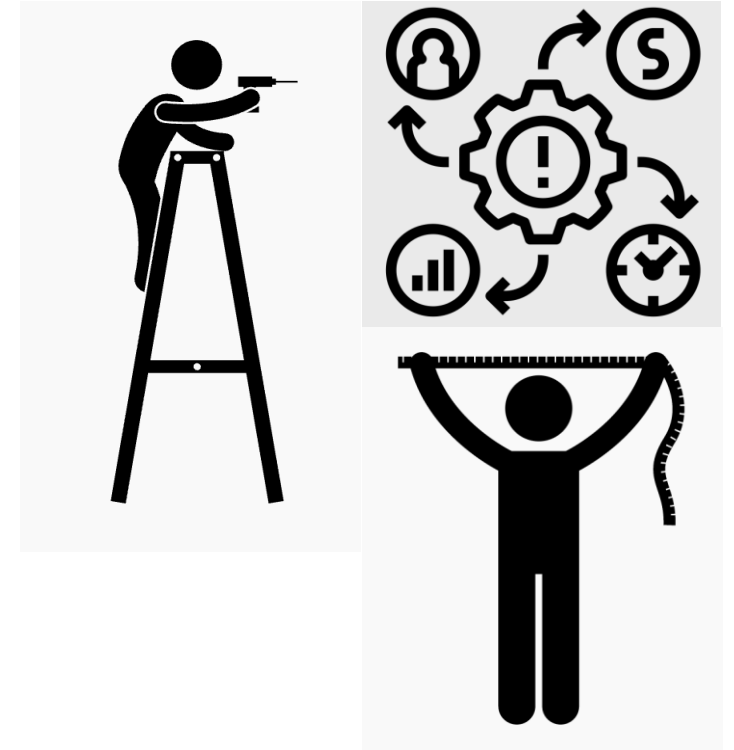
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# Putting it all together

- Like many things in Clarity, there are more than one way to manage your security rights
  - Designing an approach and being consistent are keys to keeping the system sustainable
  - Even with a good design, you may find your setup limiting or getting unwieldy over time
  - Do not be afraid to do a security review and review requirements with your stakeholders, you may be able to find new use cases or solve long lingering issues the business has with the product
- A good place to start is with our sample security groups, particularly the ones for the PMO Accelerator
  - You will find they are probably too simplistic, providing far too much access to the system
  - Use them as inspiration, create a copy, then tune them to your needs

[Documentation Link](#)



## Tip #3



Avoid using the OOTB security groups directly as product management can and will update the rights assigned to the group

# Project Manager for a Department with its own Projects/Resources

In our organization, Project Managers manage project properties, status reports, schedules, resource allocations, tasks, baselines and financial plans for all projects in their departments and all resources in their departments.



**Project Manager  
for Department X**

## Navigation Rights

- Project Management – Tiles Navigate
- Project Management – Navigate
- Resource Management – Navigate

## Data Management Rights

- Project Edit (OBS)
- Project – Modify Baseline (OBS)
- Status Report – Create (Global)
- Project – Risk, Issue, Change – Create...(OBS)
- ...

## Project Creation Rights

- Project – Create from Template (Global)
- Project View (Instance) <Project Templates>

Security group can be used for Field Level Security on Resource attributes, default views, landing page, etc.

## Data Visibility Rights

- Project View (OBS)
- Project – View All – Status Report (OBS)
- Project – Financial (OBS)
- ...

## Resource Rights

- Resource – View (OBS)
- Resource – Hard Book (OBS)
- Resource – Soft Book (OBS)
- ...

## Tip #4



Create dedicated Organizational Breakdown Structures for Security, do not reuse the finance driven financial OBS (product prevents you)

# Resource Manager COE for a Large Organization

In our organization, we have a dedicated group of resource managers (RMCOE) who oversee booking for all resources in the organization. They have the authority to book resources to any investment and can add time on resource behalf, approve timesheets and manage skills.



**Resource  
Manager COE**

## Navigation Rights

- Project Management – Navigate
- Resource Management – Navigate
- Staffing – Navigate

## Data Management Rights

- Resource – Enter Time (OBS)
- Resource – Approve Time (OBS)
- Resource – Update Skills (OBS)
- Project – Risk, Issue, Change – Create...(OBS)
- ...

## Resource Creation Rights

- Resource – Create (Global)
- Resource – Edit (OBS)
- Resource – Edit Financial (OBS)

Security group can be used for Field Level Security on Project attributes, default views, landing page, etc.

## Data Visibility Rights

- Project – View Management (OBS)
- Resource – View Book (OBS)
- ...

## Resource Rights

- Resource – View (OBS)
- Resource – Hard Book (OBS)
- Resource – Soft Book (OBS)
- ...

**Tip #5**



Use Instance or OBS to hide investments you not want your users to see such as Administrative accounts, OOTB project templates

# Large Enterprise with 5 Divisions

In our enterprise, 5 divisions that operate individually and might occasionally share resources and work. We are open and want people to know what is happening at any given time. We have a mix of PMs and RMs in each of the 5 divisions and 1 ePMO Director overseeing everything.

Let's talk about Partitions!

## Tip #6

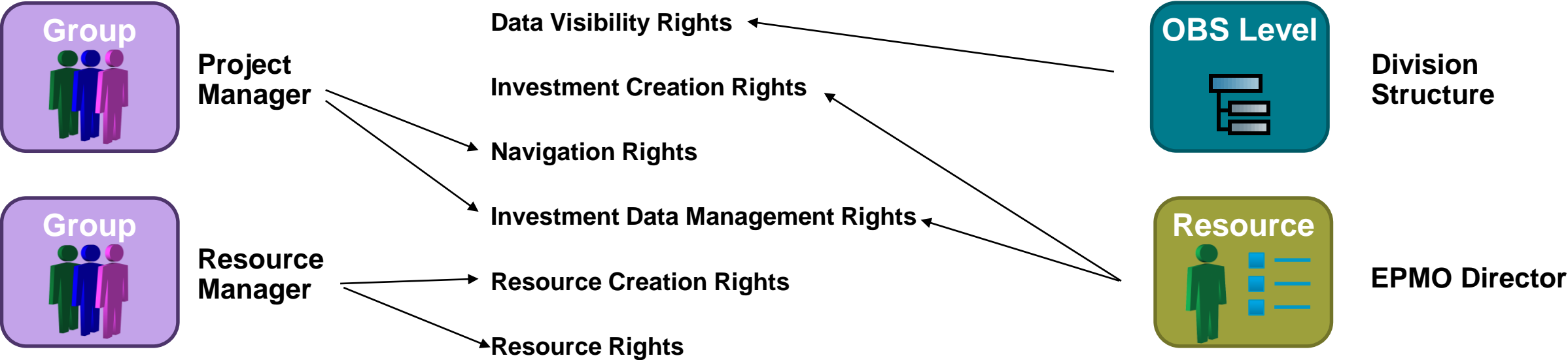


Do not use partitions, if you have already implemented partitioning, consider revamping your Clarity implementation

# Large Enterprise with 5 Divisions

In our enterprise, 5 divisions that operate individually and might occasionally share resources and work. We are open and want people to know what is happening at any given time. We have a mix of PMs and RMs in each of the 5 divisions and 1 ePMO Director overseeing everything.

Security groups can be used for Field Level Security on Project & Resource attributes, default views, landing page, etc.



**Tip #7**



Take advantage of Security Access Stacking to minimize duplicating assignment of security rights



# I Have a Great Security Model, I just want to Roll out the MUX

We have been using Clarity for a long time and we have a well-established security model. Everything works perfectly and we just want to roll out the modern UX in a limited pilot.

MUX Security groups can be used for Field Level Security on Project & Resource attributes, default views, landing page, etc.



**Existing  
Project  
Manager**

+



**MUX Project  
Manager**

## Navigation Rights

- Project Management – Tiles Navigate
- Project Management – Navigate
- Resource Management – Navigate
- + Other Functionality



**Existing  
Resource  
Manager**

+



**MUX Resource  
Manager**

## Navigation Rights

- Project Management – Navigate
- Resource Management – Navigate
- Staffing – Navigate
- + Other Functionality

## Tip #7



Take advantage of Security Group Stacking to minimize duplicating assignment of security rights

# Democratize the **Administration** of Clarity

*Data administration and UI design have been separated to help adoption*

## System Administrators

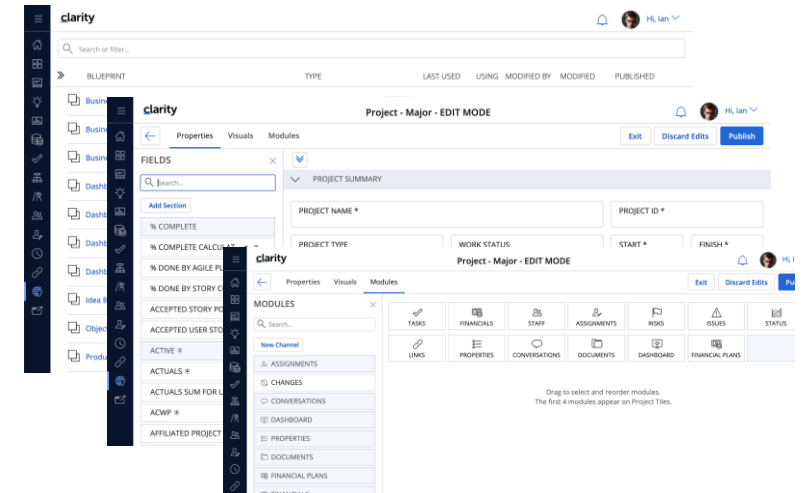
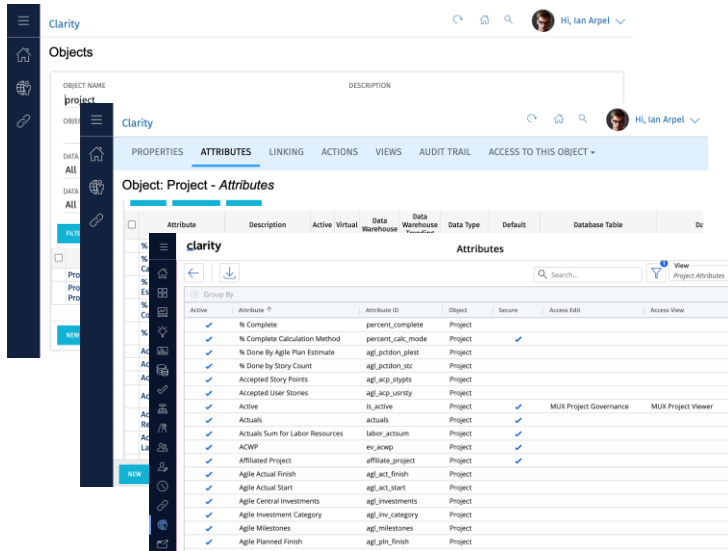
- Responsible for the data model
- Creation and management of objects/attributes
- Manage user accounts, data access and security groups

### ePMO Security Rights for MUX:

- *Administration – Navigate*
- *Administration – Blueprints – Navigate*
- *Administration – System Settings*
- *View – Administer*
- *Widgets – Manage Widget Library*
- Blueprint access rights to manage blueprints
- Page – View access rights to configure custom landing page

## ePMO

- Responsible for how teams interact with the solution
- Creation and management of Investment Blueprints
- Establish Business Rules to refine the solution



## End Users

- Responsible for how they want to use the solution
- Creation and management of ad-hoc views
- Visualize data with Widgets

## Tip #8



Let the users determine how they want to work while maintaining data integrity and governance through the application of security rights

# Keeping it Manageable

- Consider organizing your security access/groups along three main areas:
  - Data Access, User Experience, Product Functionality
  - Allows you to expand one area without impacting others, i.e., add new MUX functionality to a subset of PMs in the organization
- Combine the access groups to satisfy your organization's business requirements
- Leverage the three places to assign access rights where appropriate with the right scope to solve the Clarity Security Puzzle
- Consider automation if your requirements dictate too many security group configurations to keep track of:
  - Create an object to create user profiles, i.e., Project Manager from Department X
  - The User Profile outlines the security group that must be assigned to a resource to enable the necessary functionality in Clarity
  - Tie into your provisioning process to align resources to profiles in Clarity
  - Use XOG, REST API or the Modern UX User Admin Grid (Copy/Paste!, Bulk Edit!!) to assign resource to group(s)



clarity Users

Search... View (Copy) Standard View Save

Select All Deselect All

Group By				
Last Name *	First Name *	User Name *	Resource ID *	User Groups
<input type="checkbox"/> Amos	Cheryl	camos	cherylAmos	Basic group for user access; Modern UX PML; PMO Partition IT
<input type="checkbox"/> Baker	Isaac	isaac	issacBaker	Basic group for user access
<input type="checkbox"/> Barry	Debra	debra	debraBarry	Basic group for user access; Checklist Sharing; Modern UX VS...
<input type="checkbox"/> Bauer	Joyce	jbauer	joyceBauer	Basic group for user access; Checklist Sharing; PMO Partition IT
<input type="checkbox"/> Berks	Paul	paul	paulBerks	Basic group for user access; Checklist Sharing; Demo Project ...
<input type="checkbox"/> Bernard	Luc	luc	lucBernard	Basic group for user access; Modern UX PML; MUX Project Go...

Columns Details



# In Summary

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# Today's Security Tips

1. Do not modify security groups *on-the-fly*, make sure you Model – Test – Deploy to ensure you get what you expect;
2. Do not rely on business rules to replace security rights, blueprints (and associated business rules) can be easily changed
3. Avoid using the OOTB security groups as product management can and will update the rights assigned to the group
4. Create dedicated Organizational Breakdown Structures for Security, do not reuse the finance driven financial OBS (product prevents you)
5. Use Instance or OBS to hide investments you not want your users to see such as Administrative accounts, OOTB project templates
6. Do not use partitions, if you have already implemented partitioning, consider revamping your Clarity implementation
7. Take advantage of Security Group Stacking to minimize duplicating assignment of security rights
8. Let the users determine how they want to work while maintaining data integrity and governance through the application of security rights

# Stay Engaged with Broadcom

WEEKLY	MONTHLY		QUARTERLY	SEMIANNUALLY
<b>Office Hours</b>  <b>40 ATTENDEES</b>  <i>Relationship-building open conversations between customers and Product Management</i>	<b>Roadmap Review</b>  <b>110 ATTENDEES</b>  <i>Gives customers <b>confidence and validates our strategy</b></i>	<b>End to End Demo</b>  <b>200 ATTENDEES</b>  <i>Drives awareness &amp; adoption by showcasing product capabilities.</i>	<b>Release Preview</b>  <b>300 ATTENDEES</b>  <i>Go-to-Market for the release allows us to <b>take credit for the value delivered</b></i>	<b>User Groups</b>  <b>600 ATTENDEES</b>  <i>Regional meetings featuring customer presentations that <b>promote our community</b></i>
	<b>Innovation Call</b>  <b>40 ATTENDEES</b>  <i>Customers <b>participate in prioritization</b> by pitching ideas &amp; voting</i>	<b>Design Studio</b>  <b>15 ATTENDEES</b>  <i>Open discussion between UX and customers <b>on use cases</b></i>	<b>Value Validation</b>  <b>6 ATTENDEES</b>  <i>3 day customer-led sprint where they <b>use the new features &amp; provide feedback</b></i>	<b>CAB</b>  <b>10 ATTENDEES</b>  <i>Forum for large customers to <b>share experiences &amp; identify industry trends</b></i>

Email [clarity@broadcom.com](mailto:clarity@broadcom.com) to sign up for any program



UNITE THE  
ENTERPRISE  
AND **REVIVE**  
THE ePMO  
WITH  
CLARITY.



Thank you

