

1. Introduction

Access to CA Clarity™ PPM functionality is defined by the type of named users and the options licensed. Named users are either Managers or Team Members. Managers have full use of the functionality in CA Clarity PPM and any licensed options. The functionality in CA Clarity PPM and the options is shown in Section 2. Team Members have specified, limited use of functionality as outlined in Section 3 of this document. If the View Only User option is licensed, then unlimited viewing of information is available for users that have neither Manager nor Team Member rights. Refer to Section 3 for details. All Manager and Team Member users are named, not concurrent. Only “Active Users” are counted. Refer to Section 4 for details.

2. CA Clarity PPM Functionality

The following table lists key functional capabilities available in the core CA Clarity PPM license.

CA Clarity PPM : Functional Areas
Project Management
Program Management
Project Portfolio Management
Resource Management
Demand Management
Project Financial Management
Business Objects Reporting
Collaboration
Document Management

CA Clarity PPM : Functional Areas
Processes and Workflow
Configuration, Administration
PMO Best Practices Content
PRINCE2 Best Practices Content
PMBOK Best Practices Content
Integration with Microsoft Project and Open Workbench
Integration through the XML Open Gateway
Integration with CA IT Management Applications
Integration with BMC Remedy Service Desk
IT Service Portfolio Management
Asset Portfolio Management
Application Portfolio Management
Business Relationship Management
IT Financial Management
Requirements Planning
Product Portfolio Management
Idea-to-launch Management
Advanced Earned Value Management
Idea and Incident Submittals
Unlimited Amount of Named Users Viewing Access
Unlimited Business Objects Report Viewing
Integration with Microsoft SharePoint

3. CA Clarity PPM Functionality by User Type

The following table lists key functional capabilities and indicates which types of user are authorized. Use this table to determine whether a user should be a Manager, Team Member or a View Only User.

CA Clarity PPM Functionality	Manager	Team Member	View Only User
IT Portfolio Management			
IT Portfolio Management includes portfolio management functionality for services, assets and applications.			
Establish a hierarchy of IT services	√		
Group portfolios in hierarchies	√		
View the aggregate labor and cost of child investments for a service	√	√	√
Create departmental hierarchy to capture department-level work, budgets, cost recovery, portfolio and capacity planning, service descriptions and delivery	√		
View services, view departments, and subscribe to a service	√		
Create multiple portfolios (Applications, Products, Assets and Services)	√		
Create and edit portfolio analysis criteria	√		
View portfolio scorecards	√	√	√
Conduct portfolio analysis	√		
Create and manage portfolio scenarios	√		
Run portfolio scenarios through Capacity Planning	√		
Communicate portfolio decisions through workflow	√		
Create new portfolio fields in Clarity Studio	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Create new portfolio portlets in Clarity Studio	√		
IT Financial Management			
Financial Planning			
Set up and view budgets and forecasts using “simple budgets”	√		
Define detailed forecasts using cost plans	√		
Conduct what-if analysis	√		
Chargeback Allocations			
Charge back IT costs per service to subscribers	√		
Define a system of rules used to generate chargebacks, debit transactions and accounting credits	√		
View a customer invoice preview and line item drill down as charges accumulate	√	√	√
View cost recovery statements contrasting incurred costs with charged back costs for services provided to a given customer	√	√	√
Allocate costs to ‘overhead’ and chargeback accordingly	√		
Reverse any past chargeback allocations, either partially or in full	√		
Allocate chargebacks to a selected fiscal period or split an allocation over multiple periods	√		
Cost and Rate Management			
Create multiple rate rules by investment, department, project, or client	√		
Mark-up costs by a specified percentage	√		
Internal Chargeback			
Create internal invoices	√		
Review pro forma invoices	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Business Relationship Management (BRM)			
Update the customer and provider portals, and the customer, provider, and service dashboards in Clarity Studio	√		
View all portals, dashboards, and portlets	√	√	√
Configure the customer and provider portals, and the customer, provider, and service dashboards from the application side	√		
Project Portfolio Management			
Project Portfolio Manager includes portfolio management functionality for projects and programs and other work.			
Create and edit project portfolio analysis criteria	√		
View project portfolio scorecards	√	√	√
Conduct project portfolio analysis	√		
Create and manage project portfolio scenarios	√		
Run project portfolio scenarios through Capacity Planning	√		
Communicate project portfolio decisions through workflow	√		
Create new project portfolio fields in Clarity Studio	√		
Create new project portfolio portlets in Clarity Studio	√		
Product Portfolio Management			
Product Portfolio Management includes portfolio management functionality for products.			
Create and edit product portfolio analysis criteria	√		
View product portfolio scorecards	√	√	√
Conduct product portfolio analysis	√		
Create and manage product portfolio scenarios	√		
Run product portfolio scenarios through Capacity Planning	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Communicate product portfolio decisions through workflow	√		
Create new product portfolio fields in Clarity Studio	√		
Create new product portfolio portlets in Clarity Studio	√		
Idea-to-Launch Management			
Stage Review	√		
Gate Review	√		
Gate Scoring	√		
Requirements Planning			
Create and edit Requirements	√		
Create and edit Release	√		
Create and edit Release Plans	√		
View Requirements, Releases, and Release Plans	√	√	√
Project Management			
Project Management includes planning and management functionality for projects and programs and all time tracking.			
Project Management			
Create project plans	√		
Create project plans from predefined templates	√		
Add tasks or subtasks to existing projects	√		
Add unplanned task to project through timesheet	√		
Access guidelines for projects	√		
Profile a project	√		
Enter time against projects	√	√	
Approve time sheets	√	√	

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Approve all time sheets	√		
View key project status, tasks, milestones, WBS and resources	√	√	√
Update task status and complete deliverables	√	√	
Create and edit plans in Open Workbench via Schedule Connect	√		
Create and edit plans in Microsoft Project via Schedule Connect	√		
Baseline a project	√		
Create project workflows and processes in Process Manager	√		
Create new project fields in Clarity Studio	√		
Create new project management portlets in Clarity Studio	√		
Capture time on non-project investments	√	√	
Resource Management			
Identify resource roles	√		
Search for resources to staff projects	√		
Save searches for resources	√		
Assign resources to projects	√		
Manage resource availability calendars	√	√	
Methodology Authoring			
Create project templates	√		
Utilize project templates to create projects	√		
Develop forms for profiling projects	√		
Create guidelines for competing tasks and deliverables	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Program Management			
Create and Manage Programs	√		
View Programs	√	√	√
Risk, Issue, & Change Management			
Create risks, issues and change requests	√	√	
View risks, issues and change requests	√	√	√
Promote risks to issues and issues to changes	√		
Budgeting, Forecasting, & Actuals			
Create budgets and forecasts with duration using simple budgets.	√		
Create detailed cost plans by role with the option to populate from staff plan using roles, along with budget approval and revision and benefit plans	√		
Calculate costs for budgets and forecasts using the default rate matrix based on roles	√		
Resource Management			
View resource dashboards and portlets	√	√	√
View resource reports	√	√	√
Create new resource fields in Clarity Studio	√		
Create new resource portlets in Clarity Studio	√		
Capacity Planning			
Create and view what-if scenarios	√		
Evaluate capacity vs. demand	√		
Manage resource supply and demand	√		
Skills Management			
Create skills database	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Manage all resource skills	√		
Manage own skills	√	√	
Find resources by skills	√		
Resource Requisitions			
Create resource requisitions	√		
Fulfill resource requisitions	√		
Create resource requisition processes in Process Manager	√		
Create new resource requisition form fields in Clarity Studio	√		
Project Financial Management			
Project Financial Management			
Define detailed budgets and forecasts using cost plans with any available plan-by types. Set up budget approval and revision. Set up benefit plans.	√		
Track actual project costs	√		
Manage resource costs and rate matrices	√		
Manage Financial Organization Breakdown Structure	√		
Setup multiple currencies and conversions	√		
View project cost accounting reports	√	√	√
Project Chargeback Allocations			
Create chargeback accounts	√		
Assign chargeback allocation rates	√		
Generate chargebacks	√		
Reverse chargebacks	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Maintain and review audit trail	√		
Demand Management			
Idea Creation and Management			
Enter new ideas	√	√	√
View status of submitted ideas	√	√	√
Approve/reject submitted ideas	√		
Set up idea review and approval processes	√		
Receive and respond to action items sent through a process that's defined on the idea object	√	√	√
Create new idea fields in Clarity Studio	√		
Create new idea portlets in Clarity Studio	√		
Convert an idea to a project	√		
Track time against an idea	√	√	
Enter budget for an idea	√	√	√
Incident Management			
Enter new incidents	√	√	√
View status of submitted incidents	√	√	√
Receive and respond to action items sent through a process that's defined on the incident object	√	√	√
View incident statistics	√	√	√
Assign incidents to resources	√		
Update incident status	√	√	√
Record time against incidents	√	√	
Set up incident workflows and processes in Process Manager	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Create new incident fields in Clarity Studio	√		
Create new incident portlets in Clarity Studio	√		
Process Management (Workflow & Processes)			
Receive notifications	√	√	√
Receive and respond to action items	√	√	
Create and edit process workflows	√		
Setup and deploy phase-gate processes	√		
View graphical workflow status	√	√	√
Manage process instances and track metrics	√		
Earned Value Management			
Contract Work Breakdown Structure Management			
Create Contracts and Agencies	√		
Define the CWBS Hierarchy	√		
Create Summary Level Planning Packages	√		
Create Control Accounts	√		
Create Work Packages	√		
Link Work Packages to Projects or Project Tasks	√		
Baseline a Contract	√		
Create the CWBS Dictionary	√		
View Contract Pricing costs	√	√	√
View Contract, CWBS and Control Account Dashboards	√	√	√
Update Earned Value Totals for Contracts	√	√	
Update Earned Value History for Contracts	√		
Generate CPR Data for Contracts	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
View CPR Reports (Formats 1-5)	√	√	√
View CWBS Dictionary report	√	√	√
View CWBS Index report	√	√	√
View Responsibility Assignment Matrix report	√	√	√
Burdening Matrix			
Define Burdening Classes	√		
Define Burdening Matrix with unlimited burdening levels	√		
Define Burden Escalation tables	√		
Associate Burdening Matrix to Project	√		
Clarity Studio (Configuration)			
Add custom fields, manage objects with PowerMods	√		
Create portlets with graphs, tables and html source	√		
Build custom pages and dashboards	√		
Configure menu items	√		
Modify application look and feel	√		
Create and manage local configurations through System Partitions	√		
Build user-defined objects	√		
End users create or edit new custom objects	√		
End users view custom objects	√	√	√
Integration with Desktop Scheduling Tools			
Access Open Workbench for desktop scheduling	√		
Access Microsoft Project for desktop scheduling	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Integration with IT Applications			
Install, configure, and use CA IT integrations (Service Desk, Harvest, UAPM)	√		
Install, configure, and use BMC Remedy integration	√		
Collaboration			
Utilize document management	√	√	
Manage events and to-dos in calendars	√	√	
Create threaded discussions topics	√		
Participate in threaded discussions	√	√	
Participate in workflows processes	√	√	
Create and edit workflows and processes using Process Manager	√		
Receive and respond to action items	√	√	
Search documents and discussions	√	√	
Receive notifications	√	√	√
View project documents in Clarity	√	√	√
View project documents in SharePoint	√*	√*	√
Business Intelligence and Reporting			
Run reports	√	√	
View report output	√	√	√
View and personalize dashboards	√	√	√
Create custom reports	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Best Practice Accelerators			
PMO Accelerator			
Load best-practice content	√		
Enable portlets, dashboards and processes	√		
Modify portlets and dashboards in Clarity Studio	√		
Modify workflows and processes	√		
View portlets and dashboards	√	√	√
PRINCE2 Accelerator			
Load best-practice content	√		
Enable portlets, dashboards and processes	√		
Modify portlets and dashboards in Clarity Studio	√		
Modify workflows and processes	√		
View and edit PRINCE2 sub-objects	√	√	
View PRINCE2 portlets and dashboards	√	√	√
Creating and Running Integrations			
XML Open Gateway (XOG)			
Run XOG processes	√		
Create, edit and manage GEL scripts	√		
System Administration			
Create and manage Organization Breakdown Structures	√		
Manage users and groups	√		
Manage security and privileges	√		
Setup fiscal and time reporting periods	√		

CA Clarity PPM Functionality	Manager	Team Member	View Only User
Setup GL accounts and charge codes	√		
Configure the data mart	√		
Schedule reports and jobs	√		

*Requires purchase of EVO

4. User Statuses

Users are named, non concurrent. Users are counted for license compliance based on their status, as described in the following table:

Status	Description
Active	Active users can log in to CA Clarity PPM and <u>are counted</u> as licensed users.
Locked	Locked users cannot log into CA Clarity PPM and <u>are not counted</u> as licensed users. Locked users are created as resources in the system but not allowed to log in.
Inactive	Inactive users cannot log into CA Clarity PPM and <u>are not counted</u> as licensed users. Inactive users cannot be assigned to projects and cannot log in.

5. Additional Information

For more information please contact your account manager, visit www.ca.com/ppm.

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