Planview ChangePoint Capabilities Matrix

Features	Brief Description	Add-On Purchase	Base User	Advanced User	Exec. Visibility User	Staffing User	Managed Services User	System Admin. (On Prem)	User Admin. (On Prem)
ADMINISTRATION									
Enterprise Administration and Configuration	Manage and Configure All Enterprise Settings, Users and Workgroups, User Settings, Projects, Project Types, Project Requests, Applications, Custom Fields.							YES	
FORMS MANAGEMENT									
Documents Administration	Access to Intelligent Forms Document Administration and Generation to create custom documents supporting workflows/intake/etc.; can be applied to a custom Actions submenu item.	YES		YES					YES
Forms Administration	Access to Intelligent Forms Administration and Generation to create custom forms supporting workflows/intake/etc.; can be applied to a custom Actions submenu item.	YES		YES					
TIME AND EXPENSE MANAGEMENT									
Timesheet Create and Update	Track project time and non-project time; view personal timesheet; track personal expenses.		YES	YES		YES	YES		
Timesheet Approval and Export	Track request time, create project/request/non-project time and expenses for others, approve time and expenses, and adjust time.		YES	YES					
Access Mobile Application [2]	Access to mobile application.	YES	YES	YES	YES	YES	YES		
Access Mobile Web	Access mobile web functionality.		YES	YES	YES	YES	YES		
PROJECT AND PROGRAM MANAGEMENT									
External User Access [3]	Access for external user to the client portal functionality.	YES							
Project and Program Workspace Collaboration	Project and Program visibility for executives, stakeholders, and external users – view projects, view tasks, view task assignments, view team folders.		YES	YES	YES	YES	YES		

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Project and Program Workspace Management	Manage projects and tasks; save project and task baselines; manage Project Worksheet views; manage Microsoft Project integrations; edit project information in fiscal periods.			YES					
Executive Visibility	Executive visibility – view relevant enterprise, project, portfolio, PPM, PSA, Resource and Capacity information.				YES				
FINANCIAL MANAGEMENT									
Project Financial Management	Manage funding source association; view and approve invoices and credit notes.		YES	YES					
Enterprise Financial Management	Management of budgets, credit notes, invoices, materials; record payments; view tax setup; create funding categories and sources; edit past fiscal period information. Set cutoff dates to prevent entry of time, expenses, material transactions, invoices, and revenue recognition (Closed Period and System Level); transfer time and expense to other projects; de-submit time.			YES					
Enterprise Financial Management Visibility	View materials, budgets, invoices, credit notes, resource costs.			YES	YES				
PORTFOLIO PLANNING									
Project Workspace Management	Ability to create and manage requests and team folders.		YES	YES					
Product and Category Management	Ability to create and manage products and product categories.			YES				YES	
Capacity Planner	View resource demand scenarios, opportunity analysis, request screening; access scenario comparisons worksheet.			YES	YES				
Product and Category Visibility	Ability to view products and product categories, view requests.		YES	YES	YES			YES	
Project/Customer Portfolio Definition	Ability to organize PPM for strategic top-down planning and provides stakeholders the ability to analyze and monitor portfolio performance. Monitor portfolios using various views such as Roadmap, Investment Map, and Scorecard.			YES	YES				
Project/Customer Portfolios Management	Capability to manage portfolios and portfolio categories.			YES					

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Project/Customer Portfolios Reporting	View customer radar reports.		YES	YES	YES				
RESOURCE MANAGEMENT									
View Resource Information	View resource related information, project history, qualifications, and survey results of team members.		YES	YES	YES				
Personal Resource Availability Planning, Calendar Synchronization	Manage personal calendar entries; enable personal calendar synchronization.		YES	YES		YES	YES		
Enterprise Resource Availability Planning, Calendar Synchronization	Manage enterprise users calendar entries; enable calendar synchronization for enterprise users; search for resources, view surveys.			YES					
Team Manager	View and edit managed resources, as well as the ability to approve and decline resource requests and allocations. Review, approve, and decline resource requests and plan projects based on resource capacity with access to the Resource Planner.			YES					
PSA AND SALES MANAGEMENT									
Manage Enterprise PSA Programs, Projects, and Activities	Manage campaigns; manage competitors; manage contacts; manage contracts; manage revenue recognition activities; manage all prospect and lead activities; manage all opportunity activities.			YES					
Manage Assigned PSA Programs, Projects, and Activities	Manage companies, contacts, knowledge items, and support items for the enterprise.		YES	YES					
BUSINESS INTELLIGENCE									
Basic Reporting Access	Create charts from an Enterprise table.		YES	YES	YES				
Administer Business Intelligence Service [4]	Administer IBM Cognos software configuration, server settings, and all security aspects.	YES							

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View Reports and Project Information [4]	View reports and workspaces; create personal workspaces using Cognos Workspace.		YES	YES	YES	YES	YES		
Administer Business Intelligence Service [4]	Create or edit a report using Report Studio or Cognos Workspace Advanced.	YES							
View Reports and Project Information [4]	Create or edit a report using Report Studio or Cognos Workspace Advanced and manage report scheduling.	YES							
USER SETUP									
Enterprise User Administration and Management	Manage all aspects of users - manage resources; manage resource information; manage workgroup and organizational information; manage qualifications and functions; manage security and access settings.								YES
Individual Performance Management	Manage metrics for all users and administration of performance management.			YES					YES

1. **Intelligent Forms capability is a separate purchase for existing customers, embedded for net new customers in the Advanced User license.**
2. **The mobile app is sold as a separate item and is not included in any role. Access is via permissions.**
3. **Client Portal is a separate purchase and separate user interface targeted to external clients and allows limited functionality and visibility.**
4. **The base Cognos BI package must be purchased. Access is via permissions.**

NOTE: This document is a high-level reference only. The full 'Changepoint Features and Role Mapping' spreadsheet should be used when doing a detailed analysis.