Security Access

Reference Guide

Planview ChangePoint 2022

© 2022 Planview, Inc. All rights reserved.

U.S. GOVERNMENT RIGHTS-Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in Changepoint Canada ULC license agreement and as provided in DFARS 227.7202-1(a) and 227.7202-3(a) (1995), DFARS 252.227-7013(c)(1)(ii) (OCT 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14 (ALT III), as applicable.

This product contains confidential information and trade secrets of Changepoint Canada ULC. Disclosure is prohibited without the prior express written permission of Changepoint Canada ULC. Use of this product is subject to the terms and conditions of the user's License Agreement with Changepoint Canada ULC.

Documentation may only be reproduced by Licensee for internal use. The content of this document may not be altered, modified or changed without the express written consent of Changepoint Canada ULC. Changepoint Canada ULC may change the content specified herein at any time, with or without notice.

Contents

1. ChangePoint Security Requirements **7**

About ChangePoint access security 7
About assigning security features 7

2. System Administration **9**

Working in ChangePoint Administration 9
Configuring and maintaining workflows 11

3. Financial Management **13**

Processing records in closed periods 13
Configuring exchange rates 13
Managing work codes and work locations 13
Configuring taxation 13
Managing funding sources 16

4. User Basics **17**

Using Intelligent Forms 17
Managing dashboards and portlets 17
Maintaining the personal calendar 18
Managing knowledge items 18
Managing team folders 19
Archiving data 21
Miscellaneous 21

5. Customer Relationship Management **23**

Managing campaigns 23
Managing competitors 24
Managing leads 24
Managing prospects 25
Managing opportunities 26
Managing opportunity scenarios 30
Using the scenario comparisons worksheet 30

6. Customer and Contact Management **33**

Managing customers 33
Managing contacts 35

7. Contract Management **37**

Managing contracts 37

8. Projects and Tasks **41**

Managing projects 41
Using Project Worksheet 45
Managing tasks 46
Updating the status of tasks 49

9. Budgeting **51**

Managing budgets 51

10. Products and Materials **55**

Managing products 55
Managing materials 55

11. Requests and Support Items **57**

Managing request templates 57
Managing requests 57
Managing support items 59

12. Invoices, Credit Notes and Revenue Recognition **61**

Managing invoices and credit notes 61
Managing contractor invoices 63
Processing revenue recognition 64

13. User Setup and Resource Management **65**

Configuring and maintaining resource information 65
Managing resources 67
Managing resource requests 69
Managing resource demand scenarios 70
Using Resource Planner 71
Using workforce planning 73
Using Service Scheduler 73

14. Time and Expenses **75**

Managing time 75
Managing expenses 76

15. Individual and Project Portfolio Performance **79**

Configuring individual performance management settings 79

Managing individual and team performance 79
Managing project portfolio performance 80

16. Survey Management 83

Managing surveys 83

17. Report Creation 87

Managing and scheduling ChangePoint Analytics reports 87
About access to data in ChangePoint Analytics 88

18. ChangePoint Security Features 89

Features sorted by name 89
Features sorted by category 111

Index 135

1. ChangePoint Security Requirements

About ChangePoint access security

ChangePoint uses the security capabilities of Microsoft technologies, as well as custom security elements, to restrict access to information to authorized users within your organization. There are three basic security steps involved in launching ChangePoint:

1. Authentication – Authentication occurs when the server that contains the ChangePoint database confirms the identity of the individual who is attempting to access the database. The type of authentication depends on the setup of your organization's internal network and the ChangePoint client that they decide to use.

2. User permission – After authentication, the database is checked to confirm that the individual requesting access is a current ChangePoint user. Permissions are also set on the ASP directory. If your organization does not use single sign-on (SSO), users must enter a user ID and password that matches the user ID and password stored in ChangePoint Administration. ChangePoint launches after the user identity has been validated.

3. Feature and role checking – The security features and roles that are assigned to the user are checked. For more information, see "About assigning security features" on page 7.

About assigning security features

ChangePoint functionality is associated to security features. Access to ChangePoint is controlled by assigning the security features to resources.

Security features are assigned by the system administrator in the following ways:

- Directly to resources.
- Security features are first mapped to roles, and then the roles are assigned to resources, which ensures that the access rights are the same for all resources that have the same roles.

In addition to security features, resources may also require specific view or edit access or specific roles to use the ChangePoint functionality.

2. System Administration

Working in ChangePoint Administration

ChangePoint administrator

ChangePoint Administrator feature

Accessing ChangePoint Administration

To access ChangePoint Administration; that is, for the gear icon ( ) to be displayed, you require at least one of the security features for functionality within ChangePoint Administration.

For a list of the security features, see the "Features sorted by category" section on page 111. The applicable features are in the Administration, Import/Export Management, and Survey Management categories.

For a main menu item to be displayed in ChangePoint Administration, you require access to at least one of the menu options that are under the menu item.

Locking ChangePoint

Lock ChangePoint feature

Setting up users

See the "Configuring and maintaining resource information" section on page 65.

Enabling alternate name setup

Manage Alternate Name Settings feature

Creating and editing custom data providers

Data Provider Administration feature

Configuring budget items types

Manage Budget Request Configuration feature

Configuring budget settings

Manage Budget Request Configuration feature

Configuring auto-numbering for customers, contracts, projects and resource requests

Manage Auto-Numbering Setup feature

Configuring auto-numbering for revenue recognition batch numbering

Manage Revenue Recognition Batch Numbering feature

Importing/Exporting data

Import Data feature

Export Data feature

Managing export publishing

Access Export Publishing feature

Configuring Client Portal settings

Manage Client Portal Users feature

Archiving data

See the "Archiving data" section on page 21

Using the Transport Tool

Access Transport Tool feature

Administer IBM Cognos Analytics software configuration and server settings

Cognos Administrator feature

Adding ChangePoint Analytics reports to ChangePoint

Cognos Administrator feature AND **Manage Reports** feature

Adding submenu headers and items to the Actions menu

Manage Custom Sections feature

Access Infiniti Manage from ChangePoint Administration

Access Document Administration security feature OR

Access Forms Administration security feature

+ **Global Administrator** role in Infiniti Manage

Configuring and maintaining workflows

Creating and editing workflow definitions

Workflow Administrator feature

Editing an entity (request, resource request, an opportunity or project) in a specific state in workflow

Edit access to the entity:

- **Edit Requests** feature
- **Edit Opportunities** feature
- **Edit Projects** feature

  Note: Access restrictions can be set up on a state definition that prevent resources from editing an entity.

3. Financial Management

Processing records in closed periods

Processing records in closed periods

Process Records in Closed Periods feature

If you have this feature, you can edit past period information for yourself or for others through the central time/expense entry. This includes new records and adjustment records.

Configuring exchange rates

Configuring exchange rates

Manage Exchange Rates feature

Editing exchange rates

Edit Exchange Rates feature

Managing work codes and work locations

Creating work codes and work locations

Edit Tax Setup feature

Editing work codes and work locations

Edit Tax Setup feature

Viewing work codes and work locations

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Deleting work codes and work locations

Delete Tax Setup feature

Configuring taxation

Creating tax rates

Edit Tax Setup feature

Editing tax rates

Edit Tax Setup feature

Viewing tax rates

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Deleting tax rates

Delete Tax Setup feature

Creating tax schedules

Edit Tax Setup feature

Editing tax schedules

Edit Tax Setup feature

Viewing tax schedules

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Deleting tax schedules

Delete Tax Setup feature

Creating recoverable taxes

Edit Tax Setup feature

Editing recoverable taxes

Edit Tax Setup feature

Viewing recoverable taxes

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Creating expense taxation

Edit Tax Setup feature

Editing expense taxation

Edit Tax Setup feature

Viewing expense taxation

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Creating service taxation

Edit Tax Setup feature

Editing service taxation

Edit Tax Setup feature

Viewing service taxation

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Creating product taxation

Edit Tax Setup feature

Editing product taxation

Edit Tax Setup feature

Viewing product taxation

View Tax Setup feature OR **Edit Tax Setup** feature OR **Delete Tax Setup** feature

Deleting product taxation

Edit Tax Setup feature

Deleting recoverable taxes

Edit Tax Setup feature

Deleting expense taxation

Edit Tax Setup feature

Deleting service taxation

Edit Tax Setup feature

Managing funding sources

Managing funding categories and funding sources

Manage Funding Sources feature

Managing funding source associations

Manage Funding Source Association feature

+ view access to the entity if the association is created from the entity profile

OR

+ edit access to the entity if the association is created from the edit dialog box

4. User Basics

Using Intelligent Forms

Access a form that creates or edits an entity

Access Forms Generation security feature

+ access to the entity profile

+ access to the **Actions** submenu item for the form, if restrictions have been enabled

Access a form that generates a document

Access Document Generation security feature

+ access to the entity profile

+ access to the **Actions** submenu item for the form, if restrictions have been enabled

Accessing the Intelligent Forms in Progress portlet

Access Document Generation security feature

OR

Access Forms Generation security feature

Managing dashboards and portlets

Creating a personal dashboard

The **Allow user to create or modify personal dashboards** check box must be selected in the **User Setup** dialog box.

Accessing portlets

To access most portlets, you must have the feature with the corresponding name. For example, to view the **My Favorite Reports** portlet, you must have the **My Favorite Reports** feature.

The requirements to access the other portlets are listed in the requirements for the related entity or functionality.

Maintaining the personal calendar

Creating and editing entries in your personal calendar

Edit Personal Calendar Entries feature

Deleting entries in your personal calendar

Delete Personal Calendar Entries feature

Viewing entries in your personal calendar

View Personal Calendar Entries feature

Marking calendar entries as a nonworking day

Mark Calendar Entries as Nonworking Days feature

Synchronizing your calendar appointments with Microsoft Outlook

Enable Calendar Synchronization feature to use the client-side (Outlook) or server-side (Exchange) synchronization

Changing calendar synchronization settings

Modify Calendar Synchronization feature

Managing knowledge items

Creating knowledge items

Create Knowledge Items feature

Creating knowledge items from the profile of an entity

Create Knowledge Items feature

+ view access to the entity

Editing knowledge items that you created

Create Knowledge Items feature OR **Edit Knowledge Items** feature

Editing knowledge items, regardless of who created them

Edit Knowledge Items feature

+ subscription to the knowledge item

Deleting knowledge items that you created

Delete Knowledge Items feature

Deleting knowledge items, regardless of who created them

Delete Knowledge Items feature

+ subscription to the knowledge item

Viewing knowledge items

View Knowledge Items feature

+ subscription to the knowledge item

Viewing knowledge items from the profile of an entity

View Knowledge Items feature

+ view access to the entity

+ subscription to the knowledge item

Searching for knowledge items

View Knowledge Items feature

+ subscription to the knowledge item

Checking in and checking out knowledge items

Check-in/checkout controls must be enabled in ChangePoint Administration.

Overriding knowledge items currently checked out by other resources

Override Checkout feature

Viewing version history for knowledge items

View Version Control Information feature

+ version control must be enabled in ChangePoint Administration

Managing team folders

Creating team folders

Create Team Folders feature

Editing a team folder, including specifying team members

You must be team leader of the team folder

+ access to the customers to be able to specify the customers and the associated contacts as team members

Deleting team folders

You must be the team leader of the team folder

OR

Delete Team Folders feature

+ you must be a team member of the team folder, either directly or through a workgroup or role

Accessing a team folder

View Team Folders feature

+ you must be one of the following:

- team leader of the team folder
- a team member of the team folder (directly or through a workgroup or role)
- a resource, and access to all ChangePoint users has been enabled for the team folder

Accessing a team folder through Client Portal

Access to Client Portal

+ general collaboration access rights for Client Portal

+ you must be a team member of the team folder, or access for all Client Portal users has been enabled for the team folder

Creating team items

You must have access to the team folder

Editing team items

You must be the creator of the team item

Deleting team items

You must be the team leader of the team folder

OR

You must be the creator of the team item

OR

Delete Team Folders feature

+ you must be a team member of the team folder (directly or through a workgroup or role)

Archiving data

Archive administrator

ChangePoint Administrator feature AND **Manage Archiving** feature

Archiving data for a contract

Manage Archiving feature

+ you must be the contract manager

Archiving data for a project

Manage Archiving feature

+ you must be the project manager

Miscellaneous

Accessing cards in entity profiles

View [entity name] feature is required to view the entity card. For example, to view the **Requests** card, you require the **View Requests** feature.

Access to the ChangePoint Mobile app

Access Mobile Application feature

Exporting data

Export Data feature

Creating new state/province records

Manage States/Provinces feature

5. Customer Relationship Management

Managing campaigns

Creating campaign categories

Create Campaigns feature

Editing campaign categories

Edit Campaigns feature

Deleting campaign categories

Delete Campaigns feature

Viewing campaign categories

View Campaigns feature OR **Create Campaigns** feature

Creating campaigns

Create Campaigns feature

Editing campaigns

Edit Campaigns feature

Deleting campaigns

Delete Campaigns feature

Viewing campaigns and campaign categories that you created

View Campaigns feature

Viewing campaigns and campaign categories regardless of who created them

Create Campaigns feature

Creating contacts for campaigns

Create Contacts feature

Creating customers for campaigns

Create Customers feature

Managing competitors

Creating competitors and competitor categories

Create Competitors feature

Editing competitors and competitor categories

Edit Competitors feature

Deleting competitors and competitor categories

Delete Competitors feature

Viewing competitors and competitor categories that you created

View Competitors feature

Viewing competitors and competitor categories created by others

Create Competitors feature

Managing leads

Creating, editing and deleting leads

Manage All Leads feature

+ access to the billing offices that are associated to the lead

OR

Manage Leads feature

+ the assigned sales representative must belong to a workgroup that you are authorized to access

+ access to the billing offices that are associated to the lead

Assigning a sales representative to a lead

To be assigned to a lead, a sales representative must have one of the following features:

- **Create Opportunities**
- **Edit Opportunities**
- **Manage All Opportunities**

- **Manage Workgroup Opportunities**

Create, edit and delete access to leads by workgroup

Manage Workgroup Leads feature

+ access to the workgroup

+ the sales representative for the lead must belong to the workgroup

+ access to the billing offices that are associated to the lead

Creating, editing and deleting unassigned leads

Manage Unassigned Leads feature

+ access to the billing offices that are associated to the lead

Managing prospects

Creating, editing and deleting prospects

Manage all Prospects feature

+ access to the billing offices associated to the prospect

OR

Manage Prospects feature

+ the telemarketer must belong to a workgroup that you are authorized to access

+ access to the billing offices associated to the prospect

Assigning a sales representative to a prospect

To be assigned to a prospect, a sales representative must have one of the following features:

- **Create Opportunities**
- **Edit Opportunities**
- **Manage All Opportunities**
- **Manage Workgroup Opportunities**

Create, edit and delete access to prospects by workgroup

Manage Workgroup Prospects feature

+ access to the workgroup

+ the telemarketer for the prospect must belong to the workgroup

+ access to the billing offices associated to the prospect

Creating, editing and deleting unprocessed prospects

Manage Unprocessed Prospects feature

+ access to the billing offices associated to the prospect

Assigning telemarketers to leads or prospects

Resources can be selected as telemarketers if they have one of the following features:

- **Manage All Prospects**
- **Manage Workgroup Prospects**
- **Manage Prospects**

Managing opportunities

Accessing opportunities

View Opportunities feature AND **View Customers** feature

+ access to the billing office associated to the opportunity

+ access to the customer

OR

Create Opportunities feature

+ must be the sales representative for the opportunity

+ access to the customer

OR

Edit Opportunities feature

+ must be the sales representative for the opportunity OR have access to the billing office associated to the opportunity

+ access to the customer

OR

Manage All Opportunities feature

+ access to the billing office associated to the opportunity

+ access to the customer

OR

Manage Workgroup Opportunities feature

+ access to the billing office associated to the opportunity

+ access to the workgroup of the sales representative for the opportunity

+ access to the customer

Creating opportunities

Create Opportunities feature

+ access to the customer

Sales representative for an opportunity

To be assigned to an opportunity as a sales representative, a resource must have the following:

- **Create Opportunities** feature or **Manage All Opportunities** feature
- access to the billing office of the opportunity and the associated customer

Resource for an opportunity service

To be assigned to a service, a resource must have the **Track Project-Related Time** feature.

Editing opportunities

Create Opportunities feature OR **Edit Opportunities** feature

+ access to the billing office associated to the opportunity

+ must be the sales representative for the opportunity

+ access to the customer

+ access to the opportunity, if access restrictions are enabled

Editing all opportunities in a workgroup

Manage Workgroup Opportunities feature

+ access to the workgroup

+ the sales representative for the opportunity must belong to the workgroup

+ access to the billing office associated to the opportunity

+ access to the customer

Editing all opportunities

+ **Manage All Opportunities** feature

+ access to the billing office associated to the opportunity

+ access to the customer

Creating and editing information in fiscal periods on opportunities

Edit Opportunity Information in Fiscal Periods feature

Viewing service costs and margins

+ **View Costs** feature

Changing the resource cost rate for a service item in an opportunity

View Costs feature OR **Override Cost Rates** feature

Creating and editing information that affects past fiscal periods on opportunities

Edit Opportunity Information in Fiscal Periods feature AND **Edit Information in Past Fiscal Periods** feature

Deleting opportunities that you created

Delete Opportunities feature

+ **Create Opportunities** feature

+ must be the sales representative for the opportunity

+ access to the billing office associated to the opportunity

+ access to the customer

Deleting opportunities created by others

Delete Opportunities feature

+ **Manage All Opportunities** feature

+ access to the billing office associated to the opportunity

+ access to the workgroup of the sales representative for the opportunity

+ access to the customer

Deleting opportunities in a workgroup

Delete Opportunities feature

+ **Manage Workgroup Opportunities** feature

+ access to the workgroup

+ the sales representative for the opportunity must belong to the workgroup

+ access to the billing office associated to the opportunity

+ access to the customer

Associating funding sources with opportunities and opportunity items

Manage Funding Source Association feature

+ view access to the opportunity to create an association from the opportunity profile

OR

+ edit access to the opportunity to create an association from the opportunity edit screen

Creating contracts from opportunities

Create Contracts feature

Creating projects from opportunity profiles

Create Projects feature

Creating project tasks from the service forecast

Manage Tasks feature

Copying project tasks from an existing project

Manage Tasks feature

Creating projects budgets for opportunities

Create Budgets feature

Locking and unlocking opportunity forecasts

Manage All Opportunities feature OR **Manage Workgroup Opportunities** feature

+ workgroup access to the sales representative's workgroup

Copying the opportunity forecast information to a new opportunity

Edit Opportunity Information in Fiscal Periods feature

+ **Edit Information in Past Fiscal Periods** feature to copy forecast items that affect past fiscal period values

Managing opportunity scenarios

Screening opportunities

Access Opportunity Analysis feature

+ access to the billing office of the customer that is associated with the opportunity

+ access to the billing office for all of the opportunities in an opportunity scenario in order to access the opportunity scenario for analysis

Creating resource demand scenarios from an opportunity scenario

Create Resource Demand Scenarios feature

Creating charts for opportunity scenarios

Create Charts feature

Using the scenario comparisons worksheet

Accessing the scenario comparisons worksheet

Access Scenario Comparisons feature

Creating views, and editing and deleting the views that you created

Access Scenario Comparisons feature

Viewing shared views that are created by other resources

Access Scenario Comparisons feature

Copying shared views created by other resources

Access Scenario Comparisons feature

Sharing a view that you created with others (marking a view as shared)

Manage Scenario Comparisons Views and Templates feature

Editing and deleting shared views created by other resources

Manage Scenario Comparisons Views and Templates feature

Locking entity rows in the scenario comparisons worksheet (except for projects)

Edit access to the entity

Locking project rows in the scenario comparisons worksheet

You must be the project manager OR a project plan editor

+ the option for project plan editors to take control of the project must be enabled on the project

Accessing resource demand scenario from the scenario comparisons worksheet

Create Resource Demand Scenarios feature

Viewing funding source columns in the scenario comparisons worksheet

Manage Funding Sources feature

Viewing cost and margin columns in the scenario comparisons worksheet

View Costs feature OR **Override Cost Rates** feature

Viewing configurable field columns in the scenario comparisons worksheet

View access to both of the following:

- entity that the configurable field belongs to

- configurable field

Editing configurable field values in the scenario comparisons worksheet

Edit access to the entity that the configurable field belongs to. That is, you must be able to lock the entity row.

+ edit access to the configurable field

6. Customer and Contact Management

Managing customers

Accessing customers

View Customers feature

+ access to the customer's billing office

+ access to the customer, if restrictions have been set on the customer profile.

Creating customers

Create Customers feature

You can also edit the customer profiles you created.

Editing customers, regardless of who created them

Edit Customers feature

Deleting customers, regardless of who created them

Delete Customers feature

Creating contracts from a customer profile

Create Contracts feature

Creating opportunities from a customer profile

Create Opportunities feature

Creating projects from a customer profile

Create Projects feature

+ **Manage Tasks** feature to create project tasks from the service forecast or to copy tasks from an existing project

Creating invoices from a customer profile

Create Invoices feature

+ access to the billing office on the invoice

Viewing invoices from a customer profile

View Invoices feature to see invoices created by others

+ access to the billing office on the invoice

Viewing surveys from a customer profile

View Surveys feature

Viewing requests from a customer profile

View Requests feature

+ view access to the support desk that is associated with the request

Viewing report cards from a customer profile

View CustomerRadar feature

Viewing reports from a customer profile

View access to the customer reports

Assigning Telemarketers to a customer profile

Resources are available for selection in the **Telemarketer** field if they have one of the following features:

- **Manage all Prospects**
- **Manage Workgroup Prospects**
- **Manage Prospects**

Assigning a sales representative to a customer profile

Resources are available for selection in the **Sales representative** field if they have the following features:

- **View Opportunities**
- **Edit Opportunities**
- **Manage All Opportunities**
- **Manage Workgroup Opportunities**

Viewing leads, for which you are the sales representative, in the Leads tree view

Manage Leads feature

Viewing leads of your workgroup in the Leads tree view

Manage Workgroup Leads feature

Viewing all leads in the Leads tree view

Manage All Leads feature

Managing contacts

Creating contacts

Create Contacts feature

You can also edit the profiles you created, but you cannot delete them.

Editing contacts, regardless of who created them

Edit Contacts feature

Deleting contacts, regardless of who created them

Delete Contacts feature

Creating requests from a contact profile

Creating Requests feature

Viewing surveys from a contact profile

View Surveys feature

Viewing requests from a contact profile

View Requests feature

+ view access to the support desk associated with the request

Viewing report cards from a contact profile

View Customer Radar feature

Viewing reports from a contact profile

You must have access to the customer reports

Granting Client Portal access to contacts

Access Client Portal Information feature

Only the user that granted the initial access can view or edit the Client Portal settings.

7. Contract Management

Managing contracts

Contract Manager

Invoice Approval feature

+ you must be designated as the contract manager in the contract

+ access to the billing office of the customer associated with the contract

Creating contracts

Create Contracts feature

+ access to the billing office of the customer associated to the contract

Editing contracts

Edit Contracts feature AND **View Customers** feature

+ access to the billing office of the customer associated to the contract

Viewing contracts

View Contracts feature

+ access the customer associated to the contract

+ access to the billing office associated to the contract

Copying contracts

Create Contracts feature

+ access to the billing office of the customer associated to the contract

Deleting contracts

Delete Contracts feature

+ access to the billing office of the customer associated to the contract

Linking to a project from a contract profile

View access to the contract

+ view access to the project

Changing the billing office for a contract

You must be the contract manager

Editing the override task restriction option on the contract

You must be the resource manager for the staffing workgroup of the contract.

Viewing cost rates, overtime hourly cost rates and cost currency in contracts using billing role-based cost rates

Edit access to the contract

Editing cost rates, overtime hourly cost rates and cost currency in contracts using billing role-based cost rates

Edit access to the contract

Viewing cost rates, overtime hourly cost rates and cost currency in contracts using resource-based cost rates

View Costs feature OR **Override Cost Rates** feature

+ edit access to the contract

Editing cost rates, overtime hourly cost rates and cost currency in contracts using resource-based cost rates

Override Cost Rates feature

+ edit access to the contract

Adding or editing projected resources

Access Projected Resources feature

+ edit access to the contract

Viewing the revenue recognition settings for the contract

At least one of the following features are required:

- **Adjust Revenue Recognition**
- **Process Tentative Revenue Recognition**

- **Process Final Revenue Recognition**
- **Update Revenue Recognition Settings**
- **View Revenue Recognition Reports**

Viewing the revenue recognition settings for a fixed fee schedule or product

At least one of the following features are required:

- **Adjust Revenue Recognition**
- **Process Tentative Revenue Recognition**
- **Process Final Revenue Recognition**
- **Update Revenue Recognition Settings**
- **View Revenue Recognition Reports**

+ edit access to the contract

Editing the revenue method for a fixed fee

At least one of the following features are required:

- **Process Tentative Revenue Recognition**
- **Process Final Revenue Recognition**
- **Update Revenue Recognition Settings**

+ fixed fee is not recognized

+ fixed fee is not used in any budget that is related to the contract

+ fixed fee does not have schedule items that use the current revenue method

Granting edit access to the contract

Create Contracts feature

+ access to the billing office of the customer associated to the contract

OR

Edit Contracts feature

+ access to the billing office of the customer associated to the contract

Restricting edit access to the contract to specified resources

Edit Contracts feature

+ access to the billing office of the customer associated to the contract

8. Projects and Tasks

Managing projects

Creating projects

Create Projects feature

+ access to the billing office of the customer or contract that you are creating the project for.

Project manager

Edit Projects feature

+ **Manage Tasks** feature

+ specified as project manager for the project

Project plan editor

Project plan editors can edit existing tasks.

Edit Projects feature

+ **Manage Tasks** feature

+ specified as a project plan editor for the project

+ as required, project manager must configure the options on the project for project plan editors to create tasks, delete tasks, assign summary tasks, and take ownership of the project.

Summary task manager

Assigned to a summary task in the project

+ as required, project manager must configure the options on the project for summary managers to edit, add, and/or delete the tasks under the summary task

Viewing projects

View Projects feature

+ access to the project through one of the following ways:

- project manager for the project can view their own projects and tasks
- project plan editors for the project can view the project and tasks

- summary task managers for the project can view the project and their summary tasks and subtasks
- resources that are assigned to a project task can view the project, and the tasks that they are assigned to
- resources that have been granted view access by the project manager can view the project and all project tasks

Viewing requests associated with a project

View Requests feature

+ view access to the project (if viewing restrictions on project requests has been enabled by the system administrator)

Editing projects

Edit Projects feature

+ you must be the project manager

Deleting projects

Delete Projects feature

+ you must be the project manager

Creating a project using the copy project functionality

To access the **Copy** option:

You must be the project manager, project plan editor or summary task manager for the source project

+ **Create Projects** feature (to create the target project record)

+ **Manage Tasks** feature (to create the target project tasks)

> **Note:** If you are copying a project from a workflow step, you do not require access to the projects or tasks.

Project manager for the target project requires:

You must be in the preferred resources list of the resource who is copying the project

+ **Create Projects** feature

+ **Manage Tasks** feature to copy the project tasks

Updating a project using the copy project functionality

To access the **Copy** option:

You must be the project manager, project plan editor or summary task manager for the source project.

The resources who are copying the source project can update only the target project and its tasks that they can access.

Specifying time approvers for a project

You must be the project manager

+ option to allow project managers to specify time approvers must be selected on the contract

Creating projects from requests

Create Projects feature

+ view access to the request

Submitting a resource request for a project

Edit Projects feature

+ access to the project

+ resource requests must be enabled for the billing office of the related contract

+ the option to enable resource requests at the project level must be selected in the contract

Taking ownership of a project

Edit Projects feature

+ you must be a project plan editor

+ the option to allow project plan editors to take ownership of the project must be selected in the project editing view

Granting summary task access rights

You must be the project manager

Project managers can grant specific editing rights to summary tasks managers, such as being able to create, edit and delete tasks under their assigned summary tasks

Creating a quick project from a contract

Create Projects feature – to create a project from the **Projected resources** tab of the contract

Manage Tasks feature – to create new tasks based on the projected resources information

Creating a subproject

Create Subprojects feature

+ **Manage Tasks** feature

+ the option to allow resources to create subprojects must selected on the parent project

+ you must be assigned to the task for which you are creating the subproject

Creating a material record

See the "Products and Materials" section in chapter "Products and Materials".

Associating funding sources with projects and tasks

Manage Funding Source Association feature

+ view access, if the association is created from the project or task profile

+ edit access, if the association is created from the project or task editing view

Using the Microsoft Project Integration functionality

Microsoft Project Integration feature

+ **Manage Tasks** feature

Saving a baseline for a project

Save Project Baselines feature

+ you must be the project manager

OR

Save Project Baselines feature

+ you must be a project plan editor for the project

+ option that allows project plan editors to save baselines is enabled on the project

Note: You cannot save baselines for linked MSP projects.

Saving a baseline for a subproject

Save Project Baselines feature

+ you must be the project manager for the subproject

OR

Save Project Baselines feature

+ you must be a project plan editor for the subproject

+ option that allows project plan editors to save baselines is enabled on the subjproject

Using Project Worksheet

Accessing Project Worksheet

Manage Tasks feature

+ edit access to the project or project tasks

OR

Resource has been granted view access to the project by the project manager. In this case, the resource can view all tasks and perform all activities except those that change task data.

Locking a project and editing tasks in Project Worksheet

By default, the following resources can access a project in Project Worksheet:

- Project manager can create, edit, and delete tasks, and assign resources to tasks.
- Project planned editors for the project can edit existing tasks.
- Summary task managers can lock the project and view the subtasks under their summary tasks, the task hierarchy above their tasks, and the hierarchy of tasks that are linked to their tasks.

  Note: The regular access rules apply to editing tasks. For more information, see "Managing tasks" on page 46.

Viewing and selecting fiscal or daily periods and allocating planned hours for fiscal or daily periods in Project Worksheet

Edit Project Information in Fiscal Periods feature

Creating Project Worksheet views and filters

Access to Project Worksheet

Editing Project Worksheet views and filters that you created

Access to Project Worksheet

Editing Project Worksheet views and filters created by other resources

Manage Project Worksheet Views and Filters feature

Sharing Project Worksheet views and filters with other resources

Manage Project Worksheet Views and Filters feature

Managing tasks

Summary Task Manager

Manage Tasks feature

+ assigned to a summary task on the project

Creating, editing and deleting tasks

Manage Tasks feature

+ you must be the project manager

OR

Manage Tasks feature

+ **Edit Projects** feature

+ you must be a project plan editor for the project (can edit project tasks by default)

+ access options for project plan editors to create and delete tasks must be configured on the project

OR

Manage Tasks feature

AND **Edit Projects** feature

+ you must be a summary task manager for the project (assigned to a summary task)

+ access options must be configured on the project for summary task managers to create, edit and delete tasks

> **Note:** Summary task managers can only create, edit and delete the tasks that are under the summary tasks to which they are assigned.

Creating open tasks
Setting, removing, and viewing time entry restrictions on open tasks

Create Open Tasks feature

+ edit access to the task

Viewing tasks

View Projects feature

+ access to the project through one of the following ways:

- contract managers can view projects that are linked to their contracts
- project manager for the project can view their own projects and tasks
- project plan editors for the project can view the project and tasks
- summary task managers for the project can view the project and their summary tasks and subtasks
- resources that are assigned to a project task can view the project, and the tasks that they are assigned to
- resources that have been granted view access by the project manager can view the project and all of the project tasks

Assigning tasks

You must be the project manager, project plan editors or resource manager

+ resources require the **Track Project-Related Time** feature to be assigned to a task

For a project that requires resource requests:

You must be the resource manager for the workgroup of the resource to which you want to assign to a task

+ resources require the **Track Project-Related Time** feature to be assigned to a task.

Reopening completed tasks

Edit access to the task OR you mus be assigned to the task

+ the project must not be completed

Reordering tasks

Edit access to the tasks to be reordered

Linking tasks (creating task dependencies)

Edit access to the tasks to be linked

Viewing task assignments of other resources

View Task Assignments of Others feature

By default, project manager, project plan editors and summary task managers can view the task assignments for tasks that they have edit access to, and therefore do not require this feature.

Saving a baseline for a task

Save Project Baselines feature

+ you must be the project manager

OR

Save Project Baselines feature

+ you must be a summary task manager

+ access option configured for summary task managers to save baselines

> **Note:** You cannot save baselines for linked MSP projects.

Creating tasks from requests

Manage Tasks feature

Viewing billing rates in task assignment section

View Billing and Cost Rates in Task Assignment Section feature

Viewing billing role cost rate or resource-based cost rate in task assignment section

View Billing and Cost Rates in Task Assignment Section feature

+ **View Costs** feature (if resource-based cost rates are used)

Updating the status of tasks

Updating the status of a task

You must be assigned to the task

Updating the status of your tasks by using the Task Status Compliance report

Access to the **Task Status Compliance** report

Updating the status of your tasks by using the My Task report

Access to the **My Tasks** report

9. Budgeting

Managing budgets

Accessing budgets

View Budgets feature OR **Edit Budgets** feature OR **Create Budgets** feature

+ access to the contract or project for which the budget was created

Creating budgets

Create Budgets feature

+ access to the contract or project

Edit budget views and filters created by others

Manage Budget Views and Filters feature

Share budget views and filters with others

Manage Budget Views and Filters feature

Working with fiscal periods in budgets

Edit Budget Information in Fiscal Periods feature is required to perform all actions in the budget that affect the fiscal period information, including:

- select a fiscal period for a budget
- view and edit fiscal period information
- enable the replacement of past amounts with actual amounts
- set revenue recognition rules
- create fixed fee schedules
- create milestones

Creating or editing budget amounts in past fiscal periods

Edit Information in Past Fiscal Periods feature is required to perform all actions in the budget that will affect information in past fiscal periods, including:

- adding or editing amounts

- changing dates
- editing schedules or milestones
- changing the budget item type to one that has a different exclude from budget setting
- changing revenue recognition settings

Copying budgets

Create Budgets feature

Copying items into budgets from contracts or projects

Edit access to the budget.

> **Note:** No additional access rights are required to copy items into a budget, even if the budget has fiscal periods. However, while you can copy items into fiscal periods, you cannot edit the items once they are in the budget unless you have the edit access to fiscal periods.

Editing budgets that you created

Create Budgets feature

Editing budgets created by others

Edit Budgets feature

Viewing resource-based cost rates in the budget

View Costs feature OR **Override Cost Rates** feature

Editing resource-based cost rates in the budget

Override Cost Rates feature

Deleting budgets

Edit Budgets feature AND **Delete Budgets** feature

Adding contingency amounts to budgets

Override Cost Rates feature

Viewing budget contingency amounts on reports

View Costs feature OR **Override Cost Rates** feature

Editing a frozen budget (Unfreezing a frozen budget)

Unfreeze budgets feature

10. Products and Materials

Managing products

Creating product profiles

Create Products feature

Editing products that you created

Create Products feature

Editing products created by others

Edit Products feature

Viewing product profiles that you created

Create Products feature

Viewing product profiles created by others

View Products feature OR **Edit Products** feature

Deleting products that you created

Create Products feature

Deleting products created by others

Delete Products feature

Managing materials

Creating materials

Create Materials feature

+ Must be project manager or project plan editor

OR

+ Must be granted view project access to the project by the project manager

Creating materials with dates in closed periods

Create Materials feature AND **Process Records in Closed Periods** feature

Creating new contracts from the Material dialog box

Create Materials feature AND **Create Contract** feature

Creating new products from the Material dialog box

Create Materials feature AND **Create Products** feature

Editing materials

Edit Materials feature

Editing materials with dates in closed periods

Edit Materials feature AND **Process Records in Closed Periods** feature

Deleting materials

Delete Materials feature

Deleting materials with dates in closed periods

Delete Materials feature AND **Process Records in Closed Periods** feature

Creating or editing funding source associations for materials

Manage Funding Source Association feature

+ view access to the project to which the material is associated

+ edit access to the material

11. Requests and Support Items

Managing request templates

Creating, editing, and deleting personal request templates

Available to all ChangePoint resources, but not Client Portal users.

Creating, editing and deleting shared request templates

Manage Request Templates feature

Managing requests

Support desk manager

Manage Support Desks feature

+ must be specified as the support desk manager for the support desk

> **Note:** Only resources with the **Manage Support Desks** feature are available to be selected as a support desk manager.

Viewing all requests of a a support desk regardless of access restrict

Manage Support Desks feature

+ must be the support desk manager for the support desk

Viewing requests

View Requests feature OR **Create Requests** feature OR **Edit Requests** feature

+ view or edit access to the support desk that the request is associated with

+ access to the request queue, if the request is in a queue and the access to the queue is restricted

OR

View Requests feature OR **Create Requests** feature OR **Edit Requests** feature

+ **Manage Support Desks** feature

Creating requests

Create Requests feature

+ edit access to the support desk that the request is associated with

Copying requests

Create access to requests

Creating requests from an entity profile

Create access to requests

+ view access to the entity

Viewing requests associated with a project

View access to requests

+ view access to project requests, if restrictions are enabled

Viewing requests for support customers

View Contracts feature

+ view access to requests

Editing requests

Edit Requests feature

+ edit access to the support desk that the request is associated with, if edit access restrictions have been set

Deleting requests that you created

Create Requests AND **Delete Requests** feature

+ edit access to the support desk that the request is associated with, if edit access restrictions have been set

Deleting requests created by others

Edit Requests feature AND **Delete Requests** feature

+ edit access to the support desk that the request is associated with, if edit access restrictions have been set

Creating, editing and deleting shared request templates

Manage Request Templates feature

Entering time for requests

Track Request Time feature

+ the request type and request status must be enabled for time entry

Creating opportunities from requests

Create Opportunities feature

Creating contracts from requests

Create Contracts feature

Creating projects from requests

Create Projects feature

Creating tasks from requests

Manage Tasks feature

+ access to add tasks to the project

Managing funding source associations

Manage Funding Source Association feature

+ view access to the request if the association is created from the request profile

+ edit access to the request if the association is created from the **Request** dialog box

Managing support items

Creating support items

Create Support Items feature

Viewing support items

View Support Items feature OR **Edit Support Items** feature

Editing support items

Edit Support Items feature OR **Manage Support Desks** feature

Deleting support items

Delete Support Items feature

12. Invoices, Credit Notes and Revenue Recognition

Managing invoices and credit notes

Accessing invoices

View Invoices feature

+ access to the billing office that the invoice is related to

Creating invoices

View Invoices feature

+ **Create Invoices** feature

Submitting invoices

View Invoices feature

+ **Create Invoices** feature

Editing invoices

View Invoices feature

+ **Edit Invoices** feature

Approving invoices

View Invoices feature

+ **Approve Invoices** feature

+ you must be the contract manager

Approving invoices at the second level

View Invoices feature

+ **Second Level Invoices Approval** feature

+ you must be the second-level approver on the contract

Committing invoices or credit notes

You must have the role required to commit invoices or credit notes, as specified in the billing office settings.

Creating, editing or submitting invoices in a closed period

View Invoices feature

+ **Process Records in Closed Periods** feature

+ **Create Invoices** feature OR **Invoices Edit** feature

Deleting invoices

View Invoices feature

+ **Delete Invoices** feature

Submitting batch invoices

Create Invoices feature

+ you must have the role required for batch processes, as specified in the billing office settings

Accessing credit notes

View Credit Notes feature

+ access to the billing office that the credit note is related to

Creating credit notes

Create Credit Notes feature

Submitting credit notes

View Credit Notes feature

+ **Create Credit Notes** feature

Editing credit notes

View Credit Notes feature

+ **Edit Credit Notes** feature

Desubmitting time records

Desubmit Time feature

Viewing, editing and deleting expense advances

Enter Advances feature

Setting up taxation for expenses, services and products on the Invoice dialog box

Edit Tax Setup feature

Unlocking records

Record Locking feature

Editing currency exchange rates

Edit Exchange Rates feature

Setting up closed periods

Set Closed Period Information feature

+ access to the billing office

OR

Set System-Level Cutoff Dates feature

+ access to the billing office

Setting cutoff dates at the system level

Set System-Level Cutoff Dates feature

Managing contractor invoices

Reconciling contractor invoices

Access to the **Contractor Invoice Reconciliation** report

+ view access to the contractor’s workgroup

Processing revenue recognition

Making revenue recognition adjustments

Adjust Revenue Recognition feature

Editing revenue recognition settings for the contract, and for fixed fees and products in the contract

At least one of the following features is required:

- **Update Revenue Recognition Settings**
- **Process Final Revenue Recognition**
- **Process Tentative Revenue Recognition**

+ **Edit Contracts** feature

+ access to the billing office

Running the Tentative Revenue Recognition process

Process Tentative Revenue Recognition feature

Viewing revenue recognition reports

At least one of the following features is required:

- **View Revenue Recognition Reports**
- **Process Tentative Revenue Recognition**
- **Process Final Revenue Recognition**
- **Update Revenue Recognition Settings**
- **Adjust Revenue Recognition**

+ access to the report

Running and committing final revenue recognition

Process Final Revenue Recognition feature

13. User Setup and Resource Management

Configuring and maintaining resource information

Creating and editing resources for all workgroups

Create Resources feature AND **ChangePoint Administrator** feature

+ edit access to the tabs on the **User Setup** dialog box

Creating and editing resources for specific workgroups only

Create Resources feature

+ user setup access to the specific workgroups

+ edit access to the tabs on the **User Setup** dialog box

Edit access to the tabs on the User Setup dialog box

- **Edit Resource Information Section** feature – applies to the **Resource information**, **User-managed information**, and **Payroll information** tabs
- **Edit Confidential Section** feature
- **Edit Qualifications and Functions Section** feature
- **Edit Security Access Section** feature
- **Edit Organizational Information Section** feature

View access to the tabs on the User Setup dialog box

- **View Resource Information Section** feature – applies to the **Resource information**, **User-managed information**, and **Payroll information** tabs
- **View Confidential Section** feature
- **View Qualifications and Functions Section** feature
- **View Security Access Section** feature
- **View Organizational Information Section** feature

Viewing the Resources tree view

View Resources feature

+ user setup access to the resources’ workgroups

Copying resource information

Create Resources feature

+ user setup access to the resources’ workgroups

+ the features that correspond to the tabs on the **User Setup** dialog box that contain the information to be copied

Deleting resources

Delete Resources feature

+ user setup access to the resources’ workgroups

Unlocking resources

Edit Resource Information feature

+ user setup access to the resources’ workgroups

Transferring resources to other workgroups

Edit Organizational Information Section feature

+ user setup access to both the source and target resources' workgroups

Terminating resources

Terminate Resources feature

+ user setup access to the resources’ workgroups

Viewing resource history

Edit access to one of the tabs on the **User Setup** dialog box

+ user setup access to the resources’ workgroups

Viewing pending changes for resources

Edit access to one of the tabs on the **User Setup** dialog box

+ user setup access to the resources’ workgroups

Adding qualifications to your own resource profile

Manage Personal Qualifications feature

Managing resources

Viewing resource profiles

View Resources feature

Viewing the General card on the resource profile

View Resource Information Section feature

Viewing the qualifications of other resources

View Qualifications of Others feature

Viewing the functions of other resources

View Function Assignments of Others feature

Viewing the assigned tasks of other resources

View Task Assignments of Others feature

Viewing the project history of other resources

View Project History of Others feature

Viewing the resource history of other resources

View Resource History of Others feature

Viewing the history of changes to resources' security features

The system administrator must enable history tracking for security access.

Accessing survey results from your resource profile

View Survey Rating Information feature

+ view access to the survey

Viewing survey results from another resource's profile

View Survey Rating Information feature

+ view access to the survey

+ view access to the resource

Viewing calendar entries of other resources

View Calendar Entries of Others feature

+ access to the resource's workgroup

Adding resources to the list of projected resources

Access Projected Resources feature

Editing the list of projected resources

Access Projected Resources feature

Deleting resources from the list of projected resources

Access Projected Resources feature

+ there must not be any resource requests associated with the projected resource to delete

Searching for resources

Search Resources feature

Searching for resources from contracts

You must be the resource manager for the workgroup of the contract.

Searching for resources from projects

The option to enable resource requests at the project level must be selected in the contract.

+ you are the resource manager for the staffing workgroup of the contract.

Searching for resources from task assignments

Search Resources feature AND **Manage Tasks** feature

+ access to the project

OR

The option to enable resource requests at the task level must be selected in the contract.

Searching for resources and viewing their calendar entries

View Calendars from Resource Search feature

Creating and editing calendar entries of other resources

Edit Calendar Entries of Others feature

+ access to the resource's workgroup

Deleting calendar entries of other resources

Delete Calendar Entries of Others feature

+ access to the resource's workgroup

Setting nonworking days on the personal calendars of resources and the Resource Scheduling calendar

Mark Calendar Entries as Nonworking Days feature

Resources to be included in availability planning and resource demand analysis

The following features must be assigned to the resource that you want to include:

- **Planned Resources** feature
- **Track Project-Related Time** feature (for task assignments, project team, opportunity services and projected resources demand)
- **Track Request Time** feature (for request demand)

Generic resources to be included in resource demand analysis

Planned Resources feature

+ must be assigned to a workgroup

Managing resource requests

Creating resource requests at the contract level

Access Projected Resources feature AND **Edit Contracts** feature

OR

Access Projected Resources feature AND **Create Contracts** feature

+ option to grant edit access to resources who can create contracts must be enabled on the contract

OR

Access Projected Resources feature AND **View Contracts** feature

Creating resource requests at the project level

Project manager for the project

OR

Project plan editor for the project

+ option that allows project plan editors to take ownership of the project must be enabled

Creating resource requests at the task assignment level

Project manager for the project

OR

Project plan editor for the project

OR

Summary task manager for the project

+ option to allow summary task managers to edit tasks is enabled on the project

Editing resource requests

Requirements for submitting resource requests at the appropriate level (see above).

+ request is in at a status that makes the request available for editing as defined in the workflow state definition

+ you must be the initiator or a participant in the resource request workflow (if you are the initiator, you can only edit the status and comments)

Managing resource demand scenarios

Creating resource demand scenarios

Create Resource Demand Scenarios feature

+ access to the billing office that is associated with the opportunity and contract that are included in the scenario

Editing resource demand scenarios

Edit Resource Demand Scenarios feature OR **Create Resource Demand Scenarios** feature

Viewing resource demand scenarios

View Resource Demand Scenarios feature OR **Create Resource Demand Scenarios** feature OR **Edit Resource Demand Scenarios** feature

+ access to the billing office that is associated with the opportunity and contract that are included in the scenario

Deleting resource demand scenarios

Create Resource Demand Scenarios feature OR **Edit Resource Demand Scenarios** feature OR **Delete Resource Demand Scenarios** feature

Approving or rejecting submitted resource demand scenarios

Approve Resource Demand Scenarios feature

+ access to the workgroup of the resource who created the scenario

Including data in resource demand scenario histograms

The **Planned Resources** feature must be assigned to the resources that you want to include in the histogram data

+ you must select the workgroups that you want to include in the histogram data

Accessing the Resource Demand Scenario Members view

Create Resource Demand Scenarios feature OR **Edit Resource Demand Scenarios** feature OR **Delete Resource Demand Scenarios** feature

Using Resource Planner

View-only access to Resource Planner

Resource Manager

Edit access to Resource Planner

Resource Manager

+ **Edit Resource Planner** feature

Sharing Resource Planner filters and views

Manage Resource Planner Filters and Views feature

Creating Resource Planner filters and views

Edit access to Resource Planner

Editing Resource Planner filters and views that you created

Edit access to Resource Planner

Editing Resource Planner filters and views created by other resources

Manage Resource Planner Filters and Views feature

Viewing and selecting a workgroup in Resource Planner

Resource manager for the workgroup

Viewing demand items in Resource Planner

Resource manager for the workgroup of the resource who is assigned to the demand item

+ view access to the demand items, only if view access restriction has been set on the resource manager's workgroup

Creating and editing demand items in Resource Planner

Edit Resource Planner feature

+ Resource manager for the workgroup of the resource who is assigned to the demand item

+ if create and edit access restrictions have been set on the resource manager's workgroup, create and edit access to the demand items,

Viewing, creating, or editing entities in Resource Planner

View, create, or edit access to the entity.

Note: For projects that are configured to allow project editors to take control of them, project editors can edit a project in Resource Planner without first having to take control of the project.

Processing workflow in Resource Planner

Assigned to the workflow step

+ view access to the related entity

Using workforce planning

Setting up workforce planning options for notifications

Access Workforce Planning Notifications feature

Monitoring resources

Must be resource manager for the resources' workgroup

Using Service Scheduler

Accessing Service Scheduler

View Service Scheduler feature

+ Resource manager for the workgroup of the resources

OR

Edit Service Scheduler feature

+ Resource manager for the workgroup of the resources

Viewing calendar entries in Service Scheduler

Access to Service Scheduler

+ **View Calendar Entries of Others** feature OR **Edit Calendar Entries of Others** feature OR **Delete Calendar Entries of Others** feature

Note: All calendar entries are read-only in Service Scheduler.

Manage assignments using Service Scheduler

Edit Service Scheduler feature

+ Project manager or project plan editor for the project

+ Resource manager for the workgroup of the resources

+ Resource manager must have a time zone defined in User Setup

Requirements for resources to be assigned work in Service Scheduler

Track Project Related Time feature

+ resource's user account must include a time zone

14. Time and Expenses

Managing time

Entering time for project-related work

Track Project-Related Time feature

+ access to the project that time is entered against

Entering time for request-related work

Track Request Time feature

Copying time entries

Copy Time feature

+ access to enter time entries

Tracking non-project-related time

Track Non-Project-Related Time feature

Viewing your time sheet

View Time Sheets feature

Adjusting approved time

Create Time Adjustments feature

Entering and submitting time on behalf of other resources

Central Time Administrator feature

+ access to the resource's workgroup

+ the resource for which time is entered must have the **Track Project-Related Time** or **Track Non-Project Related-Time** feature

> **Note:** Resources with the **Central Time Administrator** feature cannot enter and submit time for other resources in their own workgroup.

Transferring time from one task or project to another

Transfer Time and Expenses feature

Approving time

Time Approval feature

Approving time in batches

Access to the **Batch Time and Expense Approval** report

Desubmitting time

Desubmit Time feature

+ access to the billing office

+ option on the contract that prevents resources from desubmitting time has not been enabled

+ time record cannot be locked, in a closed period, past the submission lag, or have been adjusted.

Managing non-project time tasks

Manage Non-Project Time feature

Processing time records in closed periods

Process Records in Closed Periods feature

> **Note:** Resources with this access are exempt from closed period restrictions, and therefore can do the following before the cutoff date: create, edit, delete, adjust, submit, and approve time records

Managing expenses

Entering expenses

Track Expenses feature

Viewing expense reports

View Expenses feature

Transferring expenses from one task or project to another

Transfer Time and Expenses feature

Approving expenses

Expense Approval feature

Approving expenses that exceeds a defined threshold

Expense Approval feature

+ you must be the threshold expense approver for the workgroup

Approving expenses in batches

Access to the **Batch Time and Expense Approval** report

Entering expenses, and creating and submitting expense reports on behalf of other resources

Central Expense Administrator feature

+ access to the resource's workgroup

> **Note:** Resources with the **Central Expense Administrator** feature cannot create and submit expense reports for other resources in their own workgroup.

Processing expense records in closed periods

Process Records in Closed Periods feature

> **Note:** Resources with this access are exempt from closed period restrictions, and therefore can do the following before the cutoff date: create, edit, delete, adjust, submit, approve expense records

Managing expense categories and types and their associated options

Manage Expenses feature

15. Individual and Project Portfolio Performance

Configuring individual performance management settings

Setting up IPM reporting periods, metric templates, calculations and IPM defaults

Performance Management Administrator feature

Managing individual and team performance

Creating metrics, and editing or deleting metrics you created

Create Metrics feature

Editing metrics created by other resources

Edit Metrics feature

Deleting metrics created by other resources

Delete Metrics feature

Viewing your personal metric results

View Personal Metrics Results feature AND **My Performance** feature.

Viewing metrics, metric assignments and entered data

View Metrics feature OR **Create Metrics** feature OR **Edit Metrics** feature

Viewing results for the resources that are inputs to a team metric, and that are in your workgroup

View Personal Metrics Results feature AND **My Performance** feature AND **View My Workgroup Metric Results (Drill-Down)** feature

Viewing results for all the resources that are inputs to a team metric, and that are in a workgroup you have access to

View Personal Metrics Results feature AND **My Performance** feature AND **View Metric Results of any Resource** feature

+ workgroup access

Viewing overall results for a team metric for resources that are assigned to the metric, and that are in your workgroup

View Workgroup-Level Rollup of Metric Results feature AND **People Performance Management** feature

Viewing overall results for a team metric for resources that are assigned to the metric, and that are in your workgroup or in workgroups you have access to

View Workgroup-Level Rollup of Metric Results feature AND **People Performance Management** feature

+ workgroup access

Accessing the People Performance Management portlet

View Workgroup-Level Rollup of Metric Results feature AND **People Performance Management** feature

Viewing team metric results for your workgroup

View My Workgroup Metric Results (Drill-Down) feature AND **People Performance Management** feature.

Viewing rollup information for all workgroups to which you have access

View My Workgroup Metric Results (Drill-Down) feature AND **View Any Resource Metric Results** feature AND **View Workgroup-Level Rollup of Metric Results** feature AND **People Performance Management** feature

Managing project portfolio performance

Creating, editing or deleting portfolio categories

Manage Portfolio Categories feature

Viewing portfolio categories

View Portfolios feature

Creating portfolios

Create Portfolios feature

Editing portfolios

Edit Portfolios feature AND **View Portfolios** feature

+ edit access to portfolios

Viewing portfolios

View Portfolios feature

+ view access to portfolios

OR

Edit Portfolios feature

Deleting portfolios

Delete Portfolios feature AND **View Portfolios** feature

+ view access to projects included in portfolios

+ edit access to portfolios

Selecting projects to be added to portfolios

Create Portfolios feature OR **Edit Portfolios** feature

+ workgroup access to the project manager's workgroup OR access to the project

Selecting scenarios to be added to portfolios

Create Portfolios feature OR **Edit Portfolios** feature

+ view access to projects associated with the opportunities included in the scenarios

+ view access to the scenarios

Viewing the Portfolio Performance Management portlet

Portfolio Performance Management feature

Creating and viewing knowledge items for metrics or project portfolio scenarios

Create Knowledge Items feature

+ subscriptions and access rights to the knowledge items

Creating resource demand scenarios for a project portfolio

Create Resource Demand Scenarios feature

Creating what-if-scenarios for a portfolio

Edit Portfolios feature AND **View Portfolios** feature

Creating charts for portfolio results

Create Charts feature

16. Survey Management

Managing surveys

Managing the complete survey functionality

Survey Management Administrator feature

Creating a survey

Create Surveys feature OR **Survey Management Administrator** feature

Creating an automated survey

Survey Management Administrator feature

Viewing a survey that you created

Create Surveys feature

Viewing surveys created by others

View Surveys feature

+ view access granted by the creator of the survey

OR

Survey Management Administrator feature

Editing a survey that you created

Create Surveys feature OR **Survey Management Administrator** feature

Editing surveys created by others

Create Surveys feature

+ edit access granted by the creator of the survey

OR

Survey Management Administrator feature

Deleting a survey that you created

Create Surveys feature OR **Survey Management Administrator** feature

Deleting surveys created by others

Create Surveys feature

+ edit access granted by the creator of the survey

OR

Survey Management Administrator feature

Viewing survey results

View Surveys feature

+ view access granted by the creator of the survey

OR

Survey Management Administrator feature

Creating a corporate or a personal template

Create Survey Templates feature

OR

Survey Management Administrator feature

Saving a survey as a corporate or a personal template

Create Survey Templates feature

+ edit access granted by the creator of the survey

OR

Survey Management Administrator feature

Viewing your survey ratings

View Surveys feature

Viewing survey ratings of other resources

You must be the creator of the survey

+ the **Exclude results** check box must be cleared in the **Access Control** dialog box

OR

Survey Management Administrator feature

OR

If you are the manager of a resource, or at a higher level in the hierarchy of your organization, you can view survey results of all resources below your level.

Viewing survey reminders

You must be the creator of a survey that is listed in the reminders

OR

Survey Management Administrator feature

Approving or rejecting an automated survey

View Surveys feature

+ edit access granted by the creator of the survey

OR

Survey Management Administrator feature

17. Report Creation

Managing and scheduling ChangePoint Analytics reports

For security access information about administering IBM Cognos Analytics and adding ChangePoint Analytics reports to ChangePoint, see "Working in ChangePoint Administration" on page 9.

Accessing ChangePoint Analytics (Analytics Portal) from ChangePoint

ChangePoint user account (no security features are required)

Creating ChangePoint Analytics reports

Cognos Professional Author feature OR **Cognos Administrator** feature

+ access to the report data in ChangePoint

Creating ChangePoint Analytics dashboards

ChangePoint user account (no security features are required)

Scheduling ChangePoint Analytics reports

You can schedule reports using Analytics Portal.

Managing security access to ChangePoint Analytics reports

The creator of the report or the Cognos administrator manages access to ChangePoint Analytics reports in Analytics Portal.

Administrator access to ChangePoint Analytics

Cognos Administrator feature

Viewing and running ChangePoint Analytics reports

View Reports feature

+ access to the report

+ access to the report data in ChangePoint

About access to data in ChangePoint Analytics

Overall, data access checks in ChangePoint Analytics are similar to data access permissions in ChangePoint. That is, if you can view an entity in the tree view, you have access to the entity data. However, the following table lists the additional requirements that apply for some query subjects of the ChangePoint-Cognos data model.

Note: You must have view or edit access to a configurable field in order for its data to appear in reports. Otherwise only the configurable field name appears.

Query subject	Required access and features
Time combined (includes project time, request time and non-project time)	Workgroup access
Financial analysis summary by customer (daily, monthly, by fiscal period)	Customer access
Financial analysis summary by project (daily, monthly, by fiscal period)	Project access
Financial analysis summary by task assignment (daily, monthly, by fiscal period)	Project access
Materials	Project access + **View Materials** feature
Non-project time	Workgroup access
Project time	Project access
Request time	Request access
Resource confidential information	Workgroup access + **View Confidential Section** feature + **Edit Confidential Section** feature
Resources	Workgroup access + **View Resources** feature

18. ChangePoint Security Features

Features sorted by name

Feature name	Description	Category
Access Client Portal Information	Grant contacts access to Client Portal	Desktop Features
Access Document Administration	Access Infiniti Manage from ChangePoint	Intelligent Forms
Access Document Generation	Access the forms that generate documents	Intelligent Forms
Access Export Publishing	Schedule the export of data packages	Administration
Access Forms Administration	Access Infiniti Manage from ChangePoint	Intelligent Forms
Access Forms Generation	Access the forms that create and edit entities	Intelligent Forms
Access Mobile Application	Access the mobile application	Desktop Features
Access Opportunity Analysis	Access opportunity analysis	Demand Management
Access Projected Resources	Access projected resources	Contract management
Access Request Screening	Access request screening	Demand Management
Access Scenario Comparisons	Access scenario comparisons	Demand Management
Access Transport Tool	Access the Transport Tool	Administration
Access Workforce Planning Notifications	Access settings for Workforce Planning notifications	Demand Management
Active Opportunities	Access the Active Opportunities portlet	Portlets

Feature name	Description	Category
Adjust Revenue Recognition	Adjust revenue recognition	Contract management
Approve Invoices	Approve invoices	Financial Management
Approve Resource Demand Scenarios	Approve or reject resource demand scenarios	Demand Management
Approved Invoices	Access the Approved Invoices portlet	Portlets
Base User	Access the ChangePoint application	NULL
Campaign Results	Access the Campaign Results portlet	Portlets
Central Expense Administrator	Enter expenses, create and submit expense reports for other resources	Desktop Features
Central Time Administrator	Enter and submit time for other resources	Desktop Features
ChangePoint Administrator	Feature required for Archive Approval and to have access to all workgroups for user setup	Administration
Client Portal User Licenses	View Client Portal user licenses	NULL
Cognos Administrator	Administer IBM Cognos software configuration, server settings, and all security aspects	Report Features
Cognos Professional Author	Create or edit a report using Create Report or Create Dashboard	Report Features
Competitive Outcomes	Access the Competitive Outcomes portlet	Portlets
Contract Warnings	Access the Contract Warnings portlet	Portlets
Copy Time	Copy time entries on the time sheet	Desktop Features

Feature name	Description	Category
Create Budgets	Create budgets for projects and contracts	Financial Management
Create Campaigns	Create campaigns and campaign categories	Campaign Management
Create Competitors	Create competitors and edit the competitors they create	Competition Management
Create Contacts	Create contacts and edit the contacts they create	Contact Management
Create Contracts	Create contracts	Contract management
Create Credit Notes	Create credit notes from invoices	Financial Management
Create Customers	Create customers and edit the customers they create	Customer Management
Create Invoices	Create invoices	Financial Management
Create Knowledge Items	Create knowledge items	Knowledge Management
Create Materials	Create materials	Financial Management
Create Metrics	Create metrics and view their own metrics	Individual Performance Management
Create Open Tasks	Create open tasks	Desktop Features
Create Opportunities	Create opportunities and edit the opportunities they create	Sales and Marketing Management

Feature name	Description	Category
Create Portfolios	Create project portfolios	Project/Customer Portfolios
Create Products	Create products and product categories	Product Management
Create Projects	Create projects	Desktop Features
Create Requests	Create requests and edit the requests they create	Support Desk Management
Create Resource Demand Scenarios	Create resource demand scenarios	Demand Management
Create Resources	Create resources	User Setup
Create States/Provinces	Add states and provinces	Desktop Features
Create Subprojects	Create subprojects	Desktop Features
Create Support Items	Create support items and view and edit their own support items	Knowledge Management
Create Survey Templates	Create survey templates and edit the templates they create	Survey Management
Create Surveys	Create surveys and edit the surveys they create	Survey Management
Create Team Folders	Create a team folder and add team members	Desktop Features
Create Time Adjustments	Create adjustment for approved time records	Desktop Features
Data Provider Administration	Create and edit data providers that are not system-defined	Administration
Delete Budgets	Delete budgets regardless of who created them	Financial Management

Feature name	Description	Category
Delete Calendar Entries of Others	Delete calendar entries of other resources	Availability Planning
Delete Campaigns	Delete campaigns regardless of who created them	Campaign Management
Delete Competitors	Delete competitors regardless of who created them	Competition Management
Delete Contacts	Delete contacts regardless of who created them	Contact Management
Delete Contracts	Delete contracts regardless of who created them	Contract management
Delete Credit Notes	Delete credit notes regardless of who created them	Financial Management
Delete Customers	Delete customers regardless of who created them	Customer Management
Delete Invoices	Delete invoices regardless of who created them	Financial Management
Delete Knowledge Items	Delete knowledge items regardless of who created them	Knowledge Management
Delete Materials	Delete materials regardless of who created them	Financial Management
Delete Metrics	Delete metrics regardless of who created them	Individual Performance Management
Delete Opportunities	Delete opportunities regardless of who created them	Sales and Marketing Management

Feature name	Description	Category
Delete Personal Calendar Entries	Delete personal calendar entries	Availability Planning
Delete Portfolios	Delete project portfolios	Project/Customer Portfolios
Delete Products	Delete products and product categories regardless of who created them	Product Management
Delete Projects	Delete projects	Desktop Features
Delete Requests	Delete requests regardless of who created them	Support Desk Management
Delete Resource Demand Scenarios	Delete resource demand scenarios	Demand Management
Delete Resources	Delete resources	User Setup
Delete Support Items	Delete support items	Knowledge Management
Delete Tax Setup	Delete tax setups	Financial Management
Delete Team Folders	Delete team folders and team items regardless of who created them	Desktop Features
Desubmit Time	Desubmit time	Financial Management
Draft Invoices	Access the Draft Invoices portlet	Portlets
Edit Budget Information in Fiscal Periods	Edit information in fiscal periods for budgets	Financial Management
Edit Budgets	Edit budgets regardless of who created them	Financial Management

Feature name	Description	Category
Edit Calendar Entries of Others	Edit calendar entries of other resources	Availability Planning
Edit Campaigns	Edit campaigns regardless of who created them	Campaign Management
Edit Competitors	Edit competitors regardless of who created them	Competition Management
Edit Confidential Section	Edit the confidential information of resources that they administrate	User Setup
Edit Contacts	Edit contacts regardless of who created them	Contact Management
Edit Contracts	Edit contracts regardless of who created them	Contract management
Edit Credit Notes	Edit credit notes regardless of who created them	Financial Management
Edit Customers	Edit customers regardless of who created them	Customer Management
Edit Exchange Rates	Edit exchange rates	Financial Management
Edit Information in Past Fiscal Periods	Edit information in past fiscal periods for opportunities, budgets, project worksheet, and resource planner	Financial Management
Edit Invoices	Edit invoices regardless of who created them	Financial Management
Edit Knowledge Items	Edit knowledge items regardless of who created them	Knowledge Management
Edit Materials	Edit materials regardless of who created them	Financial Management

Feature name	Description	Category
Edit Metrics	Edit metrics regardless of who created them	Individual Performance Management
Edit Opportunities	Edit opportunities regardless of who created them	Sales and Marketing Management
Edit Opportunity Information in Fiscal Periods	Edit information in fiscal periods for opportunities	Financial Management
Edit Organizational Information Section	Edit workgroup information, time and expense approvers and configurable field information	User Setup
Edit Personal Calendar Entries	Edit personal calendar entries	Availability Planning
Edit Portfolios	Edit project portfolios	Project/Customer Portfolios
Edit Products	Edit products regardless of who created them	Product Management
Edit Project Information in Fiscal Periods	View and select fiscal or daily periods and update planned hours for fiscal or daily periods on the project worksheet	Desktop Features
Edit Projects	Edit projects	Desktop Features
Edit Qualifications and Functions Section	Edit qualifications and functions	User Setup
Edit Requests	Edit requests regardless of who created them	Support Desk Management
Edit Resource Demand Scenarios	Edit resource demand scenarios	Demand Management

Feature name	Description	Category
Edit Resource Information Section	Edit the resource information of resources that they administrate	User Setup
Edit Resource Planner	Edit the Resource Planner	Demand Management
Edit Security Access Section	Assign and edit roles and features	User Setup
Edit Support Items	Edit support items	Knowledge Management
Edit Tax Setup	Create and edit the tax setup.	Financial Management
Edit Service Scheduler	Manage work using the Service Scheduler	Demand Management
Enable Calendar Synchronization	Synchronize with Exchange or Outlook calendar	Calendar Synchronization
Enter Advances	Enter monetary advances for other resources	Financial Management
Expense Approval	Approve the expenses of other resources	Approval Workflow
Export Data	Export data	Import/Export Management
Financial Reminders	Access the Financial Reminders portlet	Portlets
Find Person	Access the Find Person portlet	Portlets
Import Data	Import data	Import/Export Management
Invoices Pending Approval	Access the Invoices Pending Approval portlet	Portlets
Knowledge Management	Access the Knowledge Management portlet	Portlets

Feature name	Description	Category
Lock ChangePoint	Lock ChangePoint and prevent users from signing in	Administration
Manage All Leads	Manage all leads regardless of who created them	Prospect and Lead Management
Manage All Opportunities	Manage all opportunities regardless of who created them	Sales and Marketing Management
Manage All Prospects	Manage all prospects regardless of who created them	Prospect and Lead Management
Manage Alternate Name Settings	Enable or disable the alternate name functionality	Administration
Manage Archiving	Use the archiving functionality	Administration
Manage Auto-Numbering Setup	Edit auto-numbering configuration for customers, contracts, projects and resource requests	Administration
Manage Batch Invoicing Settings	Maintain invoice statuses available for selection during the batch invoicing process	Administration
Manage Billing Offices	Create and maintain billing offices	Administration
Manage Budget Request Configuration	Configure the settings for tracking changes and risks related to budget requests	Administration
Manage Budget Views and Filters	Ability to modify shared views and filters	Financial Management
Manage Client Portal User Options	Set up Client Portal user access options and workflows	Administration
Manage Client Portal Users	Review and edit Client Portal user settings, passwords and expiry dates	Administration

Feature name	Description	Category
Manage Configurable Field Settings	Manage the configurable fields available in the ChangePoint application.	Administration
Manage Configurable Field Values	Create and maintain the values available in drop-down list fields, including configurable fields and some system-defined fields	Administration
Manage Cost Centers	Maintain cost centers used in the revenue recognition process	Administration
Manage Countries	Enable or disable countries	Administration
Manage Currencies	Enable or disable currencies	Administration
Manage Custom Sections	Maintain sections and section items, and submenu headers and items on the Actions menu	Administration
Manage Customer History Tracking	Enable or disable customer history tracking	Administration
Manage Dashboards	Create and maintain the dashboards that are available to resources	Administration
Manage Data Provider Access	Set up and review data provider access to reports, by role or by resource	Administration
Manage Disclaimer and Attachment Settings	Set up options for legal disclaimers and attachment workflow for knowledge items	Administration
Manage Email Integration Settings	Set the URLs for Client Portal notifications and for the ChangePoint Web site	Administration
Manage Email Templates	Enable and set up email templates	Administration
Manage Exchange Rates	Maintain exchange rates between currencies for selected date ranges	Administration

Feature name	Description	Category
Manage Expenses	Set up expense categories and types, and their associated options	Administration
Manage Export Batch Numbering	Set up batch numbering options for each export definition specified, which will be used when the Batch Export functionality is selected	Administration
Manage Export Data Types	Set up formats of numeric fields and date fields for exports, such as currency or numeric with a comma separator	Administration
Manage Export Definitions	Set up parameters for exports, such as file name, grouping and fields to be included in exports	Administration
Manage Export Views	Enable export views (all views created in SQL starting with the string "Export" will be available)	Administration
Manage Functions	Maintain functions and their associated qualifications	Administration
Manage Funding Source Association	Associate funding sources with entities	Financial Management
Manage Funding Sources	Create and edit funding categories and funding sources	Financial Management
Manage GL Account Codes	Maintain GL account codes used for expense reports and invoice distribution	Administration
Manage Global Workgroups	Create and maintain global workgroups	Administration
Manage Knowledge Categories	Set up knowledge management categories and subcategories	Administration

Feature name	Description	Category
Manage Knowledge Subscriptions	Define security for access to knowledge categories	Administration
Manage Language Strings	Create and edit text strings displayed in the ChangePoint application user interface	Administration
Manage Leads	Manage the leads for which they are the sales representative	Prospect and Lead Management
Manage Licenses	View current license information and import new licenses	Administration
Manage Metadata	Enable additional field editing, such as duplicate checking or disabling a field from entry	Administration
Manage Non-Project Time	Set up non-project time tasks, such as vacation and holiday time	Administration
Manage Personal Qualifications	Manage their own qualifications in their Personal Preferences	Qualification Management
Manage Planning Unit Setup	Specify the unit to use for planning purposes (hours, days or FTEs)	Administration
Manage Portfolio Categories	Manage portfolio categories	Project/Customer Portfolios
Manage Project Worksheet Views and Filters	Share and edit Project Worksheet views and filters	Desktop Features
Manage Prospects	Manage prospects for which they are the telemarketer	Prospect and Lead Management
Manage Qualifications	Maintain qualifications and competencies	Administration
Manage Remit-to Addresses	Create and maintain the remit-to addresses that appear on invoices	Administration

Feature name	Description	Category
Manage Report Access	Grant access to reports, by role or by resource	Administration
Manage Reports	Set up reports (names, descriptions and paths) and edit reports regardless of who created them	Administration
Manage Request Categories	Set up request categories and subcategories, which will be available for selection on requests for each request type	Administration
Manage Request Queues	Set up routing criteria and teams of individuals assigned to address various groupings of requests	Administration
Manage Request Templates	Manage shared request templates and request template assignments	Support Desk Management
Manage Resource Planner Filters and Views	Mark Resource Planner filters and views as shared, and edit shared filters and views	Demand Management
Manage Revenue Adjustment Reason Codes	Create and maintain revenue adjustment reason codes	Administration
Manage Revenue Recognition Batch Numbering	Maintain revenue recognition batch numbering	Administration
Manage Revenue Recognition Settings	Maintain revenue recognition system settings	Administration
Manage Revenue Type GL Account Codes	Maintain default GL account codes used for each revenue recognition type	Administration
Manage Sales Methodologies	Set up opportunity statuses and set options for overriding probabilities	Administration

Feature name	Description	Category
Manage Scenario Comparisons Views and Templates	Mark scenario comparisons views and templates as shared, and edit shared views and templates	Demand Management
Manage Security Roles and Features	Set up and maintain roles, which are collections of security features	Administration
Manage Session Security	Enable or disable SSL support and enhanced session management	Administration
Manage Sign in Validation Rules	Enable and manage sign-in validation rules	Administration
Manage States/Provinces	Maintain the list of available states and provinces and enable the ZIP or postal code validation for each country	Administration
Manage Support Desk Setup	Create support desks and set up options and request numbering	Administration
Manage Support Desks	Manage all request queues and all user requests	Support Desk Management
Manage Tasks	Create, edit, and delete tasks	Desktop Features
Manage Team Folders	Change team folder leaders and close team folders that are no longer required	Administration
Manage Terminology	Change common terms used throughout the ChangePoint application, such as changing "Resource" to display "Employee"	Administration
Manage Time Control Settings	Select the status at which time will be considered actual time for a new ChangePoint installation	Administration
Manage Unassigned Leads	Manage unassigned leads regardless of who created them	Prospect and Lead Management

Feature name	Description	Category
Manage Unprocessed Prospects	Manage unprocessed prospects regardless of who created them	Prospect and Lead Management
Manage User Setup Restrictions	Maintain user setup access for specific global workgroups or workgroups	Administration
Manage Workgroup Leads	Manage leads owned by resources in their own workgroup and workgroups that they can access	Prospect and Lead Management
Manage Workgroup Opportunities	Manage opportunities for which the sales representative is in a workgroup that they can access	Sales and Marketing Management
Manage Workgroup Prospects	Manage prospects owned by resources in their own workgroup and workgroups that they can access	Prospect and Lead Management
Manage Workgroups	Create and maintain workgroups	Administration
Mark Calendar Entries as Nonworking Days	Manage nonworking day calendar entries	Availability Planning
Microsoft Project Integration	Integrate projects with Microsoft Project	Desktop Features
Modify Calendar Synchronization	Edit synchronization settings of the personal calendar	Calendar Synchronization
My Favorite Reports	Access the My Favorite Reports portlet	Portlets
My Links	Access the My Links portlet	Portlets
My Performance	Access the My Performance portlet	Portlets
My Reminders	Access the My Reminders portlet	Portlets
My Utilization	Access the My Utilization portlet	Portlets
Opportunities Lost	Access the Opportunities Lost portlet	Portlets

Feature name	Description	Category
Opportunities Won	Access the Opportunities Won portlet	Portlets
Opportunity Outcome Summary	Access the Opportunity Outcome Summary portlet	Portlets
Opportunity Rollups	Access the Opportunity Rollups portlet	Portlets
Override Checkout	Override the checkout of knowledge items currently checked out by other resources	Knowledge Management
Override Cost Rates	Edit resource-based cost rates in contracts, opportunities and budgets when the billing office is set to use resource-based cost rates	Resource Information
People Performance Management	Access the People Performance Management portlet	Portlets
Performance Management Administrator	Administrate performance management	Individual Performance Management
Planned Resources	Include in resource availability planning and resource demand analysis	Availability Planning
Portfolio Performance Management	Access the Portfolio Performance Management portlet	Portlets
Process Final Revenue Recognition	Process final revenue recognition	Contract management
Process Records in Closed Periods	Process records in closed periods	Financial Management
Process Tentative Revenue Recognition	Process tentative revenue recognition	Contract management
Record Locking	Lock records	Desktop Features

Feature name	Description	Category
Record Payments	Record payments	Financial Management
Rejected Invoices	Access the Rejected Invoices portlet	Portlets
Request Summary	Access the Request Summary (Chart) and the Request Summary portlets	Portlets
Requests Assigned to Me	Access the Requests Assigned to Me portlet	Portlets
Requests Initiated by Me	Access the Requests Initiated by Me portlet	Portlets
Save Project Baselines	Save project, task, and assignment baselines	Desktop Features
Search Resources	Search for resources	Availability Planning
Second-Level Invoice Approval	Approve invoices as secondary approver	Financial Management
Server Integration	Configure the URLs for the ChangePoint applications and the ChangePoint server	Administration
Set Closed Period Information	Set cutoff dates to prevent entry of time, expenses, material transactions, invoices and revenue recognition	Financial Management
Set System-Level Cutoff Dates	Set cutoff dates to prevent entry of time, expenses, material transactions, invoices and revenue recognition at the system-level	Financial Management
Setup Fiscal Periods	Set up fiscal periods	Financial Management
Survey Management Administrator	Manage surveys	Survey Management
Surveys	Access the Surveys portlet	Portlets

Feature name	Description	Category
Terminate Resources	Terminate Resources	User Setup
Time Approval	Approve the submitted time sheets of other resources	Approval Workflow
Track Expenses	Enter expenses or have expenses entered centrally on their behalf	Desktop Features
Track Non-Project Time	Enter time for non-project time items	Desktop Features
Track Project-Related Time	Enter time for tasks	Desktop Features
Track Request Time	Enter time for requests	Desktop Features
Transfer Records	Transfer records from one resource to another	Administration
Transfer Time and Expenses	Transfer time and expenses to other projects and tasks	Financial Management
Underutilized Resources	Access the Underutilized Resources portlet	Portlets
Unfreeze Budgets	Ability to unfreeze a budget, only the most current frozen revision can be unfrozen	Financial Management
Upcoming Campaigns	Access the Upcoming Campaigns portlet	Portlets
Update Revenue Recognition Settings	Update revenue recognition settings	Contract management
View Billing and Cost Rates in Task Assignment section	View billing rates and cost rates when creating or editing task assignments	Resource Information
View Budgets	View budgets	Financial Management
View Calendar Entries of Others	View the calendar entries of other resources	Resource Information

Feature name	Description	Category
View Calendars from Resource Match	View calendars from Resource Match	Resource Information
View Campaigns	View campaigns regardless of who created them	Campaign Management
View Competitors	View competitors regardless of who created them	Competition Management
View Confidential Section	View confidential information of resources, such as billing rates and cost rates	User Setup
View Contracts	View contracts	Contract management
View Costs	View resource-based cost rates in contract, opportunity, forecast and project (task assignment section) dialogs when the billing office is set to use resource-based cost rates	Resource Information
View Credit Notes	View credit notes	Financial Management
View Customer Radar	View customer radar reports	Project/Customer Portfolios
View Customers	View customers	Desktop Features
View Expenses	View expenses	Desktop Features
View Function Assignments of Others	View function assignments of other resources	Resource Information
View Invoices	View invoices	Financial Management

Feature name	Description	Category
View Knowledge Items	View knowledge items	Knowledge Management
View Materials	View materials	Financial Management
View Metric Results of Any Resource	View metric results of any resource	Individual Performance Management
View Metrics	View metrics regardless of who created them	Individual Performance Management
View My Workgroup Metric Results (Drill-Down)	View their own metric results and the metric results of their workgroup on the Dashboard	Individual Performance Management
View Opportunities	View opportunities regardless of who created them	Sales and Marketing Management
View Organizational Information Section	View organizational information, such as time and expense approvers and workgroup membership	User Setup
View Personal Calendar Entries	View the personal calendar entries	Availability Planning
View Personal Metrics Results	View personal metrics results	Individual Performance Management
View Portfolios	View portfolios	Project/Customer Portfolios
View Products	View products	Product Management
View Project History of Others	View the project history of other resources	Resource Information

Feature name	Description	Category
View Projects	View projects	Desktop Features
View Qualifications and Functions Section	View qualifications and functions	User Setup
View Qualifications of Others	View qualifications of other resources	Resource Information
View Reports	View reports	Desktop Features
View Requests	View requests	Support Desk Management
View Resource Demand Scenarios	View resource demand scenarios	Demand Management
View Resource History of Others	View the history of other resources	Resource Information
View Resource Information Section	View resource information	User Setup
View Resources	View resources	Resource Information
View Revenue Recognition Reports	View revenue recognition reports	Contract management
View Security Access Section	View security access information, such as assigned features and roles, workgroup access, and billing office access	User Setup
View Support Items	View support items	Knowledge Management
View Survey Rating Information	View survey rating information	Resource Information
View Surveys	View survey results	Survey Management
View Surveys of Others	View survey responses of other resources	Resource Information

Feature name	Description	Category
View Task Assignments of Others	View task assignments of other resources	Resource Information
View Tax Setup	View the tax setup	Financial Management
View Team Folders	View team folders	Desktop Features
View Time Sheets	View their own time sheet	Desktop Features
View Version Control Information	Redundant feature used for upgrade purposes	Administration
View Workgroup-Level Rollup of Metric Results	View workgroup-level rollup of metric results	Individual Performance Management
View Service Scheduler	Launch the Service Scheduler	Demand Management
Workflow Administrator	Create and manage workflow processes	Administration
Workgroup Utilization	Access the Workgroup Utilization portlet	Portlets

Features sorted by category

Category	Feature name	Description
Administration	Access Export Publishing	Schedule the export of data packages
Administration	Access Transport Tool	Access the Transport Tool
Administration	ChangePoint Administrator	Feature required for Archive Approval and to have access to all workgroups for user setup

Category	Feature name	Description
Administration	Data Provider Administration	Create and edit data providers that are not system-defined
Administration	Lock ChangePoint	Lock ChangePoint and prevent users from signing in
Administration	Manage Alternate Name Settings	Enable or disable the alternate name functionality
Administration	Manage Archiving	Use the archiving functionality
Administration	Manage Auto-Numbering Setup	Edit auto-numbering configuration for customers, contracts, projects and resource requests
Administration	Manage Batch Invoicing Settings	Maintain invoice statuses available for selection during the batch invoicing process
Administration	Manage Billing Offices	Create and maintain billing offices
Administration	Manage Budget Request Configuration	Configure the settings for tracking changes and risks related to budget requests
Administration	Manage Client Portal User Options	Set up Client Portal user access options and workflows
Administration	Manage Client Portal Users	Review and edit Client Portal user settings, passwords and expiry dates
Administration	Manage Configurable Field Settings	Manage the configurable fields available in the ChangePoint application.
Administration	Manage Configurable Field Values	Create and maintain the values available in drop-down list fields, including configurable fields and some system-defined fields
Administration	Manage Cost Centers	Maintain cost centers used in the revenue recognition process

Category	Feature name	Description
Administration	Manage Countries	Enable or disable countries
Administration	Manage Currencies	Enable or disable currencies
Administration	Manage Custom Sections	Maintain sections and section items, and submenu headers and items on the Actions menu
Administration	Manage Customer History Tracking	Enable or disable customer history tracking
Administration	Manage Dashboards	Create and maintain the dashboards that are available to resources
Administration	Manage Data Provider Access	Set up and review data provider access to reports, by role or by resource
Administration	Manage Disclaimer and Attachment Settings	Set up options for legal disclaimers and attachment workflow for knowledge items
Administration	Manage Email Integration Settings	Set the URLs for Client Portal notifications and for the ChangePoint Web site
Administration	Manage Email Templates	Enable and set up email templates
Administration	Manage Exchange Rates	Maintain exchange rates between currencies for selected date ranges
Administration	Manage Expenses	Set up expense categories and types, and their associated options
Administration	Manage Export Batch Numbering	Set up batch numbering options for each export definition specified, which will be used when the Batch Export functionality is selected

Category	Feature name	Description
Administration	Manage Export Data Types	Set up formats of numeric fields and date fields for exports, such as currency or numeric with a comma separator
Administration	Manage Export Definitions	Set up parameters for exports, such as file name, grouping and fields to be included in exports
Administration	Manage Export Views	Enable export views (all views created in SQL starting with the string "Export" will be available)
Administration	Manage Functions	Maintain functions and their associated qualifications
Administration	Manage GL Account Codes	Maintain GL account codes used for expense reports and invoice distribution
Administration	Manage Global Workgroups	Create and maintain global workgroups
Administration	Manage Knowledge Categories	Set up knowledge management categories and subcategories
Administration	Manage Knowledge Subscriptions	Define security for access to knowledge categories
Administration	Manage Language Strings	Create and edit text strings displayed in the ChangePoint application user interface
Administration	Manage Licenses	View current license information and import new licenses
Administration	Manage Metadata	Enable additional field editing, such as duplicate checking or disabling a field from entry
Administration	Manage Non-Project Time	Set up non-project time tasks, such as vacation and holiday time

Category	Feature name	Description
Administration	Manage Planning Unit Setup	Specify the unit to use for planning purposes (hours, days or FTEs)
Administration	Manage Qualifications	Maintain qualifications and competencies
Administration	Manage Remit-to Addresses	Create and maintain the remit-to addresses that appear on invoices
Administration	Manage Report Access	Grant access to reports, by role or by resource
Administration	Manage Reports	Set up reports (names, descriptions and paths) and edit reports regardless of who created them
Administration	Manage Request Categories	Set up request categories and subcategories, which will be available for selection on requests for each request type
Administration	Manage Request Queues	Set up routing criteria and teams of individuals assigned to address various groupings of requests
Administration	Manage Revenue Adjustment Reason Codes	Create and maintain revenue adjustment reason codes
Administration	Manage Revenue Recognition Batch Numbering	Maintain revenue recognition batch numbering
Administration	Manage Revenue Recognition Settings	Maintain revenue recognition system settings
Administration	Manage Revenue Type GL Account Codes	Maintain default GL account codes used for each revenue recognition type
Administration	Manage Sales Methodologies	Set up opportunity statuses and set options for overriding probabilities

Category	Feature name	Description
Administration	Manage Security Roles and Features	Set up and maintain roles, which are collections of security features
Administration	Manage Session Security	Enable or disable SSL support and enhanced session management
Administration	Manage Sign in Validation Rules	Enable and manage sign-in validation rules
Administration	Manage States/Provinces	Maintain the list of available states and provinces and enable the ZIP or postal code validation for each country
Administration	Manage Support Desk Setup	Create support desks and set up options and request numbering
Administration	Manage Team Folders	Change team folder leaders and close team folders that are no longer required
Administration	Manage Terminology	Change common terms used throughout the ChangePoint application, such as changing "Resource" to display "Employee"
Administration	Manage Time Control Settings	Select the status at which time will be considered actual time for a new ChangePoint installation
Administration	Manage User Setup Restrictions	Maintain user setup access for specific global workgroups or workgroups
Administration	Manage Workgroups	Create and maintain workgroups
Administration	Server Integration	Configure the URLs for the ChangePoint applications and the ChangePoint server
Administration	Transfer Records	Transfer records from one resource to another

Category	Feature name	Description
Administration	View Version Control Information	Redundant feature used for upgrade purposes
Administration	Workflow Administrator	Create and manage workflow processes
Approval Workflow	Expense Approval	Approve the expenses of other resources
Approval Workflow	Time Approval	Approve the submitted time sheets of other resources
Availability Planning	Delete Calendar Entries of Others	Delete calendar entries of other resources
Availability Planning	Delete Personal Calendar Entries	Delete personal calendar entries
Availability Planning	Edit Calendar Entries of Others	Edit calendar entries of other resources
Availability Planning	Edit Personal Calendar Entries	Edit personal calendar entries
Availability Planning	Mark Calendar Entries as Nonworking Days	Manage nonworking day calendar entries
Availability Planning	Planned Resources	Include in resource availability planning and resource demand analysis
Availability Planning	Search Resources	Search for resources
Availability Planning	View Personal Calendar Entries	View the personal calendar entries
Calendar Synchronization	Enable Calendar Synchronization	Synchronize with Exchange or Outlook calendar
Calendar Synchronization	Modify Calendar Synchronization	Edit synchronization settings of the personal calendar
Campaign Management	Create Campaigns	Create campaigns and campaign categories

Category	Feature name	Description
Campaign Management	Delete Campaigns	Delete campaigns regardless of who created them
Campaign Management	Edit Campaigns	Edit campaigns regardless of who created them
Campaign Management	View Campaigns	View campaigns regardless of who created them
Competition Management	Create Competitors	Create competitors and edit the competitors they create
Competition Management	Delete Competitors	Delete competitors regardless of who created them
Competition Management	Edit Competitors	Edit competitors regardless of who created them
Competition Management	View Competitors	View competitors regardless of who created them
Contact Management	Create Contacts	Create contacts and edit the contacts they create
Contact Management	Delete Contacts	Delete contacts regardless of who created them
Contact Management	Edit Contacts	Edit contacts regardless of who created them
Contract management	Access Projected Resources	Access projected resources
Contract management	Adjust Revenue Recognition	Adjust revenue recognition
Contract management	Create Contracts	Create contracts

Category	Feature name	Description
Contract management	Delete Contracts	Delete contracts regardless of who created them
Contract management	Edit Contracts	Edit contracts regardless of who created them
Contract management	Process Final Revenue Recognition	Process final revenue recognition
Contract management	Process Tentative Revenue Recognition	Process tentative revenue recognition
Contract management	Update Revenue Recognition Settings	Update revenue recognition settings
Contract management	View Contracts	View contracts
Contract management	View Revenue Recognition Reports	View revenue recognition reports
Customer Management	Create Customers	Create customers and edit the customers they create
Customer Management	Delete Customers	Delete customers regardless of who created them
Customer Management	Edit Customers	Edit customers regardless of who created them
Demand Management	Access Opportunity Analysis	Access opportunity analysis
Demand Management	Access Request Screening	Access request screening
Demand Management	Access Scenario Comparisons	Access scenario comparisons

Category	Feature name	Description
Demand Management	Access Workforce Planning Notifications	Access settings for Workforce Planning notifications
Demand Management	Approve Resource Demand Scenarios	Approve or reject resource demand scenarios
Demand Management	Create Resource Demand Scenarios	Create resource demand scenarios
Demand Management	Delete Resource Demand Scenarios	Delete resource demand scenarios
Demand Management	Edit Resource Demand Scenarios	Edit resource demand scenarios
Demand Management	Edit Resource Planner	Edit the Resource Planner
Demand Management	Edit Service Scheduler	Manage work using the Service Scheduler
Demand Management	Manage Resource Planner Filters and Views	Mark Resource Planner filters and views as shared, and edit shared filters and views
Demand Management	Manage Scenario Comparisons Views and Templates	Mark scenario comparisons views and templates as shared, and edit shared views and templates
Demand Management	View Resource Demand Scenarios	View resource demand scenarios
Demand Management	View Service Scheduler	Launch the Service Scheduler
Desktop Features	Access Client Portal Information	Grant contacts access to Client Portal
Desktop Features	Access Mobile Application	Access the mobile application

Category	Feature name	Description
Desktop Features	Central Expense Administrator	Enter expenses, create and submit expense reports for other resources
Desktop Features	Central Time Administrator	Enter and submit time for other resources
Desktop Features	Copy Time	Copy time entries on the time sheet
Desktop Features	Create Open Tasks	Create open tasks
Desktop Features	Create Projects	Create projects
Desktop Features	Create States/Provinces	Add states and provinces
Desktop Features	Create Subprojects	Create subprojects
Desktop Features	Create Team Folders	Create a team folder and add team members
Desktop Features	Create Time Adjustments	Create adjustment for approved time records
Desktop Features	Delete Projects	Delete projects
Desktop Features	Delete Team Folders	Delete team folders and team items regardless of who created them
Desktop Features	Edit Project Information in Fiscal Periods	View and select fiscal or daily periods and update planned hours for fiscal or daily periods on the project worksheet
Desktop Features	Edit Projects	Edit projects
Desktop Features	Manage Project Worksheet Views and Filters	Share and edit Project Worksheet views and filters
Desktop Features	Manage Tasks	Create, edit, and delete tasks
Desktop Features	Microsoft Project Integration	Integrate projects with Microsoft Project

Category	Feature name	Description
Desktop Features	Record Locking	Lock records
Desktop Features	Save Project Baselines	Save project, task, and assignment baselines
Desktop Features	Track Expenses	Enter expenses or have expenses entered centrally on their behalf
Desktop Features	Track Non-Project Time	Enter time for non-project time items
Desktop Features	Track Project-Related Time	Enter time for tasks
Desktop Features	Track Request Time	Enter time for requests
Desktop Features	View Customers	View customers
Desktop Features	View Expenses	View expenses
Desktop Features	View Projects	View projects
Desktop Features	View Reports	View reports
Desktop Features	View Team Folders	View team folders
Desktop Features	View Time Sheets	View their own time sheet
Financial Management	Approve Invoices	Approve invoices
Financial Management	Create Budgets	Create budgets for projects and contracts
Financial Management	Create Credit Notes	Create credit notes from invoices
Financial Management	Create Invoices	Create invoices

Category	Feature name	Description
Financial Management	Create Materials	Create materials
Financial Management	Delete Budgets	Delete budgets regardless of who created them
Financial Management	Delete Credit Notes	Delete credit notes regardless of who created them
Financial Management	Delete Invoices	Delete invoices regardless of who created them
Financial Management	Delete Materials	Delete materials regardless of who created them
Financial Management	Delete Tax Setup	Delete tax setups
Financial Management	Desubmit Time	Desubmit time
Financial Management	Edit Budget Information in Fiscal Periods	Edit information in fiscal periods for budgets
Financial Management	Edit Budgets	Edit budgets regardless of who created them
Financial Management	Edit Credit Notes	Edit credit notes regardless of who created them
Financial Management	Edit Exchange Rates	Edit exchange rates
Financial Management	Edit Information in Past Fiscal Periods	Edit information in past fiscal periods for opportunities, budgets, project worksheet, and resource planner

Category	Feature name	Description
Financial Management	Edit Invoices	Edit invoices regardless of who created them
Financial Management	Edit Materials	Edit materials regardless of who created them
Financial Management	Edit Opportunity Information in Fiscal Periods	Edit information in fiscal periods for opportunities
Financial Management	Edit Tax Setup	Create and edit the tax setup.
Financial Management	Enter Advances	Enter monetary advances for other resources
Financial Management	Manage Budget Views and Filters	Ability to modify shared views and filters
Financial Management	Manage Funding Source Association	Associate funding sources with entities
Financial Management	Manage Funding Sources	Create and edit funding categories and funding sources
Financial Management	Process Records in Closed Periods	Process records in closed periods
Financial Management	Record Payments	Record payments
Financial Management	Second-Level Invoice Approval	Approve invoices as secondary approver
Financial Management	Set Closed Period Information	Set cutoff dates to prevent entry of time, expenses, material transactions, invoices and revenue recognition

Category	Feature name	Description
Financial Management	Set System-Level Cutoff Dates	Set cutoff dates to prevent entry of time, expenses, material transactions, invoices and revenue recognition at the system-level
Financial Management	Setup Fiscal Periods	Set up fiscal periods
Financial Management	Transfer Time and Expenses	Transfer time and expenses to other projects and tasks
Financial Management	Unfreeze Budgets	Ability to unfreeze a budget, only the most current frozen revision can be unfrozen
Financial Management	View Budgets	View budgets
Financial Management	View Credit Notes	View credit notes
Financial Management	View Invoices	View invoices
Financial Management	View Materials	View materials
Financial Management	View Tax Setup	View the tax setup
Import/Export Management	Export Data	Export data
Import/Export Management	Import Data	Import data
Individual Performance Management	Create Metrics	Create metrics and view their own metrics

Category	Feature name	Description
Individual Performance Management	Delete Metrics	Delete metrics regardless of who created them
Individual Performance Management	Edit Metrics	Edit metrics regardless of who created them
Individual Performance Management	Performance Management Administrator	Administrate performance management
Individual Performance Management	View Metric Results of Any Resource	View metric results of any resource
Individual Performance Management	View Metrics	View metrics regardless of who created them
Individual Performance Management	View My Workgroup Metric Results (Drill-Down)	View their own metric results and the metric results of their workgroup on the Dashboard
Individual Performance Management	View Personal Metrics Results	View personal metrics results
Individual Performance Management	View Workgroup-Level Rollup of Metric Results	View workgroup-level rollup of metric results
Intelligent Forms	Access Document Administration	Access Infiniti Manage from ChangePoint
Intelligent Forms	Access Document Generation	Access the forms that generate documents
Intelligent Forms	Access Forms Administration	Access Infiniti Manage from ChangePoint

Category	Feature name	Description
Intelligent Forms	Access Forms Generation	Access the forms that create and edit entities
Knowledge Management	Create Knowledge Items	Create knowledge items
Knowledge Management	Create Support Items	Create support items and view and edit their own support items
Knowledge Management	Delete Knowledge Items	Delete knowledge items regardless of who created them
Knowledge Management	Delete Support Items	Delete support items
Knowledge Management	Edit Knowledge Items	Edit knowledge items regardless of who created them
Knowledge Management	Edit Support Items	Edit support items
Knowledge Management	Override Checkout	Override the checkout of knowledge items currently checked out by other resources
Knowledge Management	View Knowledge Items	View knowledge items
Knowledge Management	View Support Items	View support items
NULL	Base User	Access the ChangePoint application
NULL	Client Portal User Licenses	View Client Portal user licenses
Portlets	Active Opportunities	Access the Active Opportunities portlet
Portlets	Approved Invoices	Access the Approved Invoices portlet
Portlets	Campaign Results	Access the Campaign Results portlet

Category	Feature name	Description
Portlets	Competitive Outcomes	Access the Competitive Outcomes portlet
Portlets	Contract Warnings	Access the Contract Warnings portlet
Portlets	Draft Invoices	Access the Draft Invoices portlet
Portlets	Financial Reminders	Access the Financial Reminders portlet
Portlets	Find Person	Access the Find Person portlet
Portlets	Invoices Pending Approval	Access the Invoices Pending Approval portlet
Portlets	Knowledge Management	Access the Knowledge Management portlet
Portlets	My Favorite Reports	Access the My Favorite Reports portlet
Portlets	My Links	Access the My Links portlet
Portlets	My Performance	Access the My Performance portlet
Portlets	My Reminders	Access the My Reminders portlet
Portlets	My Utilization	Access the My Utilization portlet
Portlets	Opportunities Lost	Access the Opportunities Lost portlet
Portlets	Opportunities Won	Access the Opportunities Won portlet
Portlets	Opportunity Outcome Summary	Access the Opportunity Outcome Summary portlet
Portlets	Opportunity Rollups	Access the Opportunity Rollups portlet
Portlets	People Performance Management	Access the People Performance Management portlet
Portlets	Portfolio Performance Management	Access the Portfolio Performance Management portlet

Category	Feature name	Description
Portlets	Rejected Invoices	Access the Rejected Invoices portlet
Portlets	Request Summary	Access the Request Summary (Chart) and the Request Summary portlets
Portlets	Requests Assigned to Me	Access the Requests Assigned to Me portlet
Portlets	Requests Initiated by Me	Access the Requests Initiated by Me portlet
Portlets	Surveys	Access the Surveys portlet
Portlets	Underutilized Resources	Access the Underutilized Resources portlet
Portlets	Upcoming Campaigns	Access the Upcoming Campaigns portlet
Portlets	Workgroup Utilization	Access the Workgroup Utilization portlet
Product Management	Create Products	Create products and product categories
Product Management	Delete Products	Delete products and product categories regardless of who created them
Product Management	Edit Products	Edit products regardless of who created them
Product Management	View Products	View products
Project/Customer Portfolios	Create Portfolios	Create project portfolios
Project/Customer Portfolios	Delete Portfolios	Delete project portfolios
Project/Customer Portfolios	Edit Portfolios	Edit project portfolios

Category	Feature name	Description
Project/Customer Portfolios	Manage Portfolio Categories	Manage portfolio categories
Project/Customer Portfolios	View Customer Radar	View customer radar reports
Project/Customer Portfolios	View Portfolios	View portfolios
Prospect and Lead Management	Manage All Leads	Manage all leads regardless of who created them
Prospect and Lead Management	Manage All Prospects	Manage all prospects regardless of who created them
Prospect and Lead Management	Manage Leads	Manage the leads for which they are the sales representative
Prospect and Lead Management	Manage Prospects	Manage prospects for which they are the telemarketer
Prospect and Lead Management	Manage Unassigned Leads	Manage unassigned leads regardless of who created them
Prospect and Lead Management	Manage Unprocessed Prospects	Manage unprocessed prospects regardless of who created them
Prospect and Lead Management	Manage Workgroup Leads	Manage leads owned by resources in their own workgroup and workgroups that they can access
Prospect and Lead Management	Manage Workgroup Prospects	Manage prospects owned by resources in their own workgroup and workgroups that they can access
Qualification Management	Manage Personal Qualifications	Manage their own qualifications in their Personal Preferences

Category	Feature name	Description
Report Features	Cognos Administrator	Administer IBM Cognos software configuration, server settings, and all security aspects
Report Features	Cognos Professional Author	Create or edit a report using Create Report or Create Dashboard
Resource Information	Override Cost Rates	Edit resource-based cost rates in contracts, opportunities and budgets when the billing office is set to use resource-based cost rates
Resource Information	View Billing and Cost Rates in Task Assignment section	View billing rates and cost rates when creating or editing task assignments
Resource Information	View Calendar Entries of Others	View the calendar entries of other resources
Resource Information	View Calendars from Resource Match	View calendars from Resource Match
Resource Information	View Costs	View resource-based cost rates in contract, opportunity, forecast and project (task assignment section) dialogs when the billing office is set to use resource-based cost rates
Resource Information	View Function Assignments of Others	View function assignments of other resources
Resource Information	View Project History of Others	View the project history of other resources
Resource Information	View Qualifications of Others	View qualifications of other resources
Resource Information	View Resource History of Others	View the history of other resources

Category	Feature name	Description
Resource Information	View Resources	View resources
Resource Information	View Survey Rating Information	View survey rating information
Resource Information	View Surveys of Others	View survey responses of other resources
Resource Information	View Task Assignments of Others	View task assignments of other resources
Sales and Marketing Management	Create Opportunities	Create opportunities and edit the opportunities they create
Sales and Marketing Management	Delete Opportunities	Delete opportunities regardless of who created them
Sales and Marketing Management	Edit Opportunities	Edit opportunities regardless of who created them
Sales and Marketing Management	Manage All Opportunities	Manage all opportunities regardless of who created them
Sales and Marketing Management	Manage Workgroup Opportunities	Manage opportunities for which the sales representative is in a workgroup that they can access
Sales and Marketing Management	View Opportunities	View opportunities regardless of who created them
Support Desk Management	Create Requests	Create requests and edit the requests they create
Support Desk Management	Delete Requests	Delete requests regardless of who created them

Category	Feature name	Description
Support Desk Management	Edit Requests	Edit requests regardless of who created them
Support Desk Management	Manage Request Templates	Manage shared request templates and request template assignments
Support Desk Management	Manage Support Desks	Manage all request queues and all user requests
Support Desk Management	View Requests	View requests
Survey Management	Create Survey Templates	Create survey templates and edit the templates they create
Survey Management	Create Surveys	Create surveys and edit the surveys they create
Survey Management	Survey Management Administrator	Manage surveys
Survey Management	View Surveys	View survey results
User Setup	Create Resources	Create resources
User Setup	Delete Resources	Delete resources
User Setup	Edit Confidential Section	Edit the confidential information of resources that they administrate
User Setup	Edit Organizational Information Section	Edit workgroup information, time and expense approvers and configurable field information
User Setup	Edit Qualifications and Functions Section	Edit qualifications and functions

Category	Feature name	Description
User Setup	Edit Resource Information Section	Edit the resource information of resources that they administrate
User Setup	Edit Security Access Section	Assign and edit roles and features
User Setup	Terminate Resources	Terminate Resources
User Setup	View Confidential Section	View confidential information of resources, such as billing rates and cost rates
User Setup	View Organizational Information Section	View organizational information, such as time and expense approvers and workgroup membership
User Setup	View Qualifications and Functions Section	View qualifications and functions
User Setup	View Resource Information Section	View resource information
User Setup	View Security Access Section	View security access information, such as assigned features and roles, workgroup access, and billing office access

Index

A

archiving data
features and access rights 21

B

budgets
features and access rights 51

C

campaigns
features and access rights 23

ChangePoint access security
about 7

ChangePoint Administration
features and access rights 9

ChangePoint security features
sorted by category 111
sorted by name 89

competitors
features and access rights 24

contacts
features and access rights 35

contractor invoices
features and access rights 63

contracts
features and access rights 37

credit notes
features and access rights 61

customers
features and access rights 33

D

dashboards and portlets
features and access rights 17

E

exchange rates
features and access rights 13

expense management
features and access rights 76

F

features
sorted by category 111
sorted by name 89

features and access rights
analyzing opportunities 30
archiving data 21
budgets 51
configuring exchange rates 13
configuring taxation 13
expense management 76
for ChangePoint Administration 9
for workflow management 11
maintaining resource information 65
maintaining the personal calendar 18
managing campaigns 23
managing competitors 24
managing contacts 35
managing contractor invoices 63
managing contracts 37
managing credit notes 61
managing customers 33
managing dashboards and portlets 17
managing funding sources 16
managing individual and team performance 79

managing individual performance settings 79
managing invoices 61
managing knowledge items 18
managing leads 24
managing opportunities 26
managing opportunity scenarios 30
managing products 55
managing project portfolio performance 80
managing projects 41
managing prospects 25
managing request templates 57
managing requests 57
managing resource requests 69
managing resources 67
managing support items 59
managing surveys 83
managing tasks 46
managing team folders 19
managing work codes and locations 13
materials 55
processing records in past periods 13
processing revenue recognition 64
resource demand scenarios 70
scenario comparisons worksheet 30
task status update 49
time management 75
using Project Worksheet 45

funding sources
features and access rights 16

I

individual and team performance
features and access rights 79

invoices
features and access rights 61

IPM settings
features and access rights 79

K

knowledge items
features and access rights 18

L

leads
features and access rights 24

M

materials
features and access rights 55

O

opportunities
features and access rights 26

opportunity analysis
features and access rights 30

opportunity scenarios
features and access rights 30

P

personal calendar
features and access rights 18

processing records in past periods
features and access rights 13

products
features and access rights 55

project portfolio performance
features and access rights 80

Project Worksheet
features and access rights 45

projects
features and access rights 41

prospects
features and access rights 25

R

request templates
features and access rights 57

requests
features and access rights 57

resource demand scenarios
features and access rights 70

resource information
features and access rights 65

resource requests
features and access rights 69

resources
features and access rights 67

revenue recognition
features and access rights 64

S

scenario comparisons worksheet
features and access rights 30

security
about ChangePoint access security 7

security features
assigning, about 7
sorted by category 111
sorted by name 89

support items
features and access rights 59

surveys
features and access rights 83

system administrators
features and access rights 9

T

task status update
features and access rights 49

tasks
features and access rights 46

taxation
features and access rights 13

team folders
features and access rights 19

time management
features and access rights 75

W

work codes and locations
features and access rights 13

workflow management
features and access rights 11