# Mercury™ IT Governance Center

## Tracking Your Time
## (Time Management)

**Version 5.5.0**

MERCURY INTERACTIVE

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# Table of Contents

# Chapter 1 Introduction

Mercury Time Management budgets time against bodies of work within Mercury IT Governance Center. Actual time spent on these bodies of work can be entered, reviewed, approved and reported on. Time Management integrates information from Requests, Packages, Tasks and Projects to quickly determine how estimated time and costs relate to the actual time and costs.

Use Time Management to:

- Create Work Allocations.
- Create, update and release Time Sheets.
- Review and approve Time Sheets.
- Freeze and close Time Sheets.

## About This Document

This guide describes how to navigate and use Time Management. Each chapter covers a specific topic on navigation or usage:

| | |
|---|---|
| *Key Concepts* | Defines key terms and concepts concerning Time Management. |
| *Process Overview* | Shows the basic steps of the Time Management process. |
| *Configuring the Time Management Dashboard Page* | Details how to add the Time Management Dashboard page to a Dashboard. |

| | |
|---|---|
| *Entering and Updating Work Allocations* | Gives step-by-step procedures on how to create and update Work Allocations. |
| *Entering and Releasing Time Sheets* | Provides the step-by-step procedures to create and release Time Sheets. |
| *Reviewing and Approving Time Sheets* | Details the review and approval processes for Time Sheets. |
| *Freezing and Closing Time Sheets* | Shows how to freeze and close a Time Sheet. |
| *Time Management Portlets* | Lists the Time Management Portlets. |
| *Time Management Reports* | Defines the Time Management reports. |

# Intended Audience

The intended audience for this document includes:

- Users of Time Management
- Managers who create and manage Time Sheets
- Business users responsible for reporting on Time Sheets

# Document Conventions

*Table 1-1* lists the types of conventions used in this document.

*Table 1-1. Document conventions*

| Convention | Description | Example |
|---|---|---|
| **Button, menu, tabs** | Names of interface components that can be clicked (such as buttons, menus, and tabs) are shown in bold. | **Apply** button |
| Fields, Windows, Pages | Names of windows, fields, and pages are shown as displayed. | New Request window |
| `Code` | Code input and output are shown as displayed. | `CauchoConfigFile` `C:/`*`ITG_Home`*`/conf/resin.conf` |
| *Link* | Linked URLs, filenames, and cross references are shown as blue italicized text. | *www.mercury.com* |
| *Variable* | Variables are shown as italicized text. | *ITG_Home*/bin directory |
| Note | Used to identify note boxes that contain additional information. | Note |
| Caution | Used to identify caution boxes that contain important information. Follow the instructions in all caution boxes, failure to do so may result in loss of data. | Caution |
| Example | Used to identify example boxes that contain examples of related procedure. | Example |

# Additional Resources

Mercury Interactive provides the following additional resources to help you successfully use Mercury ITG Center:

- *Related Documentation*
- *Customer Support*
- *Education Services*

## Related Documentation

The Library includes additional documents related to the topics discussed in this guide. Access the Library through the Mercury ITG Center online help.

| | |
|---|---|
| Using the Dashboard | This document provides details on using and configuring the Dashboard. |
| Configuring Time Management | This document provides administrative information and processes for Time Management. |

## Customer Support

Customer support and downloads for Mercury ITG Center and additional product information can be accessed from the Mercury Interactive Support Web site at *http://support.mercuryinteractive.com*.

## Education Services

Mercury Interactive provides a complete training curriculum to help you achieve optimal results using Mercury IT Governance Center. For more information, visit the Education Services Web site at *http://www.merc-training.com/main/ITG*.

# Chapter 2
# Key Concepts

This chapter discusses the key topics and concepts relating to Time Management. Understanding these concepts and terms is necessary when using Time Management.

This chapter covers the following topics:



## Work Items

A Work Item is the entity that time is entered against, such as a specific Project or Task. Whether budgeting time or entering time, an entity is required to budget the time against or enter the time against. A Work Item can be any of the following:

- A Request in Demand Management.
- A Package in Change Management.

- A Project or Subproject in Project Management.
- A Task in Project Management.
- A Miscellaneous item from the Time Management Validation list, such as meetings and vacations.

Work Items typically require significant time and effort, involve one or more Resources and usually span multiple process steps. Time Management allows an individual Project Task, Project or Subproject to be Work Items. By allowing Project Tasks, Projects and Subprojects to be Work Items, time spent at a granular Task level can be tracked as well as at the Project level.

*Figure 2-1* displays the Time Sheet Details page with Work Items and Work Item Types.

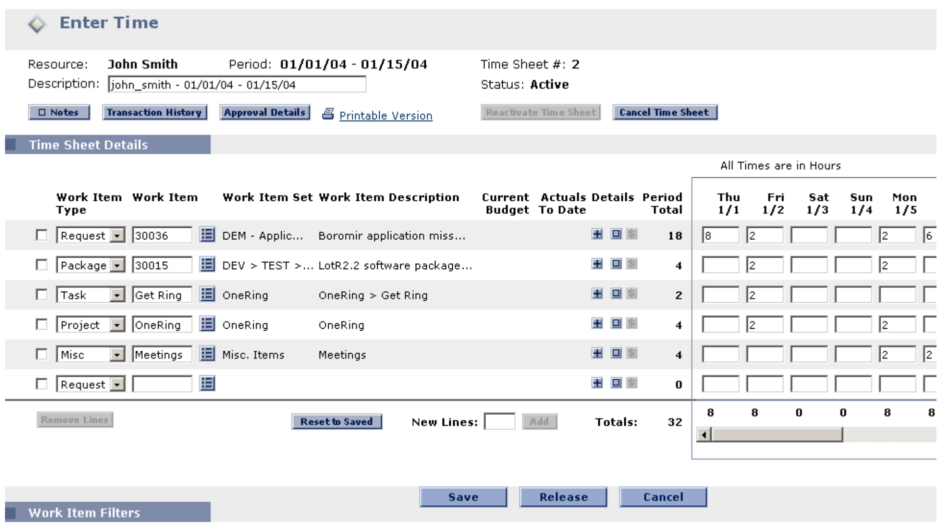



*Figure 2-1 Time Sheet Details page*

# Work Allocations

A Work Allocation is the amount of time budgeted to a Work Item. Work Allocations allow Managers and Planners to assign a specific amount of time to any given Task. Work Allocations also allow the Resources to see the time assigned to Task. *Figure 2-2* displays the Created Work Allocation page.

Note

Work Allocations can also be assigned Charge Codes, allowing time worked on a Work Item to be charged back.

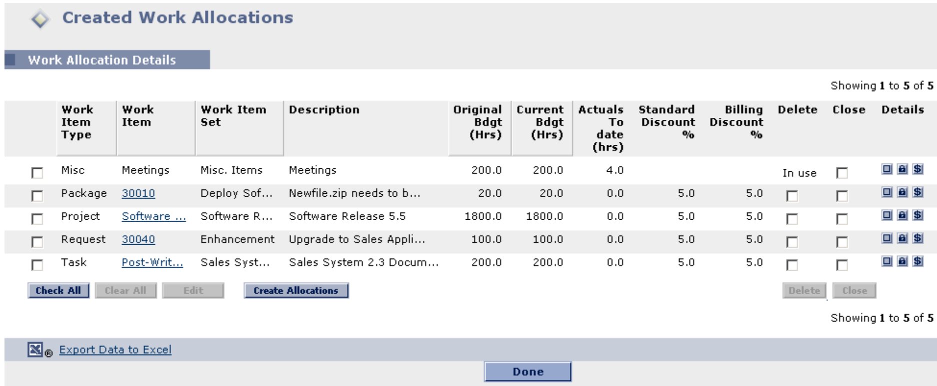



*Figure 2-2 Created Work Allocations page*

# Resources

A Resource is an individual user who performs work on a Task. Resources are assigned to specific Work Items and have attributes, such as Manager, and have a Cost Rate.

Managers and Planners enter Work Allocations for a Task. Resources enter the actual time spent on a Task using Time Sheets. *Figure 2-3* displays the Modify Resources page.

> **Note**
>
> A Resource must be a valid User.
>
> Resources used in Time Management are defined by the Resource Management and Project Costing functionality.
>
> Time Management-specific features of Resources are configured in the Time Management Settings window in the Workbench.

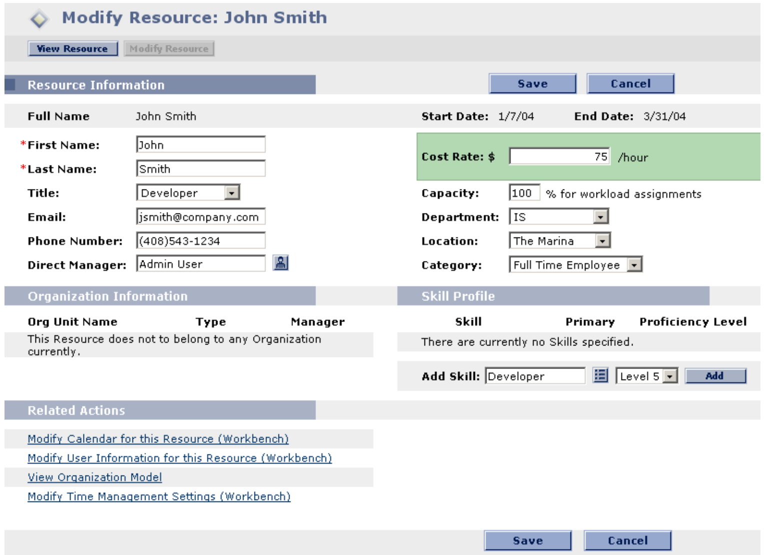



*Figure 2-3 Modify Resources page*

# Time Sheets

A Time Sheet is a basic entity in Time Management systems. Time Sheets are an aggregation of the time worked by a specific Resource for a specific period of time on one or many Work Items. A Resource enters time details at a granular level, such as for a Work Item, Activity, and Day. Review and approval processes are also performed at the Time Sheet level.

*Figure 2-4* displays a Time Sheet.

> **Note**
>
> The Enter Time page is the Time Management Time Sheet.

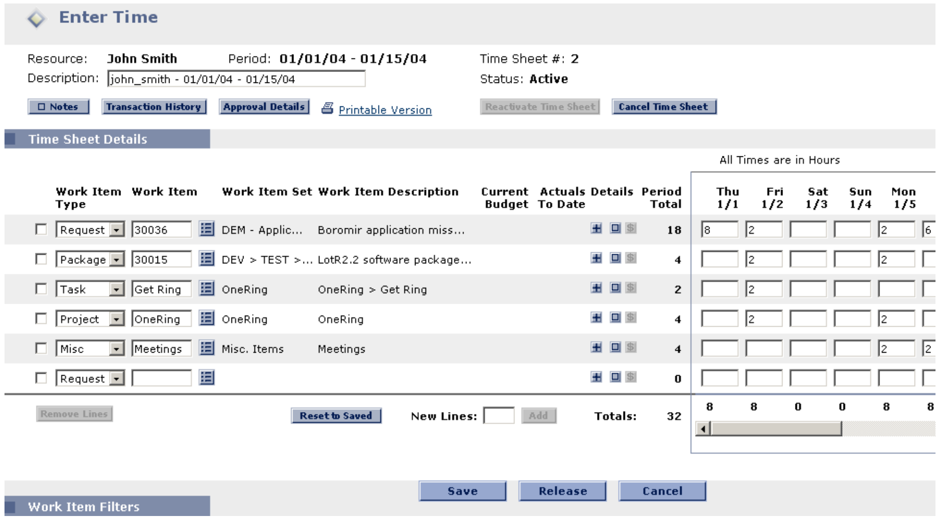



*Figure 2-4 Enter Time page*

# Activities

An Activity is a categorization of the type of work performed against a Work Item, such as design work or documentation. In addition to tracking the total time spent on a given Work Item, Time Management also tracks how much of the time was spent performing different Activities. When using Time Management, the application administrator sets up a list of Activities an organization uses to categorize actual time. An Activity Details page is illustrated in *Figure 2-5*.

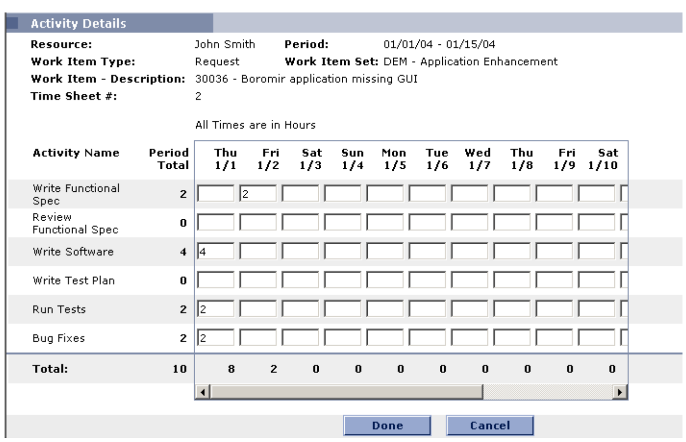



*Figure 2-5 Activity Details page*

# Charge Codes

A Charge Code is the representation of the internal or external customer who is billed for the cost of a Work Item. In some organizations, actual time is used as information for billings or charge backs. After a Work Item is entered, actual time is entered against the Work Item. This generates a cost which is billed to the internal or external customer.

While Time Management does not explicitly perform this charge back or billing function, it can specify the internal or external customer as a Charge Code. This enables the creation of links between Work Items and charge accounts, allowing time information to be extracted for billing systems. *Figure 2-6* shows a Charge Code for the Project.

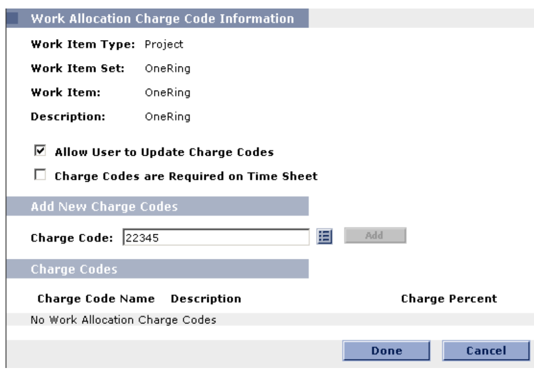



*Figure 2-6 Work Allocation Charge Code Information page*

# Period Types and Periods

Period Types specify the different types of intervals for which Time Sheets record information. Supported Period Types include:

- Weekly
  A seven day period. A start date must be specified for this Period Type. The default is Monday.
- Bi-Weekly
  A fourteen day period. A start date must be specified for this Period Type. The Default is Monday.
- Semi-Monthly
  Breaks the month into two halves:

- o 1st - 15th
- o 16th - end

- Monthly
  From the 1st to the end of the month.

A Period (Time Period) is the actual dates of a Period Type, such as “05/01/02 - 05/15/02” for a semi-monthly Period Type. Time Sheets display each day in the Time Period. *Figure 2-7* shows a Period on a Time Sheet.

> **Note** Time Management supports one or more Period Types. For example, non-exempt employees could be assigned a Weekly Period Type but exempt employees could be assigned a Semi-Monthly Period Type.

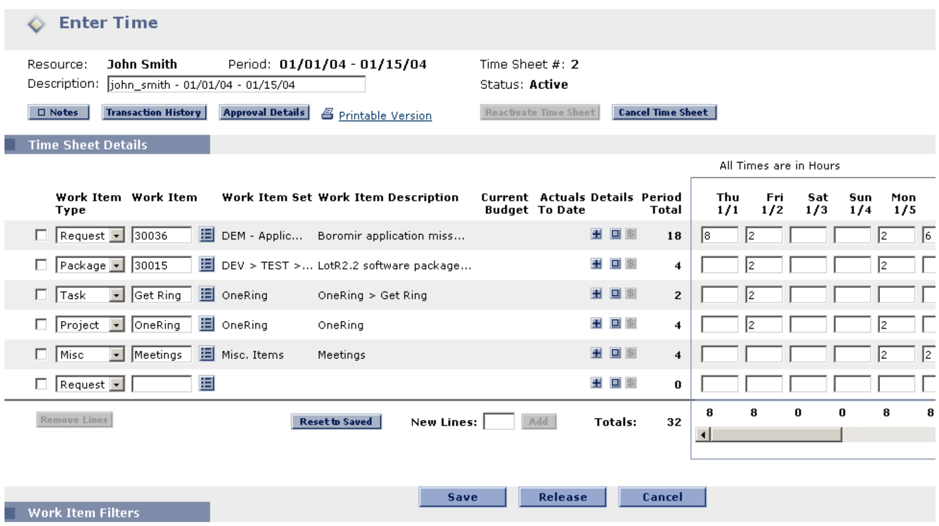



*Figure 2-7 Enter Time page*

# Delegations

A Delegation is where one Resource (delegatee) is assigned the functionality of another Resource (delegator). Delegations have specific start dates and end dates and are intended to be temporary re-assignments.

Example

A manager who normally approves Time Sheets is going on vacation for a week. That manager can delegate to a subordinate the task of approving and rejecting Time Sheets while the manager is on vacation.

A delegatee can perform the following actions on behalf of the delegator:

- Approving and rejecting Time Sheets
- Freezing and closing Time Sheets
- Editing and submitting Time Sheets

To perform these operations, the delegatee must have the proper Access Grants. The Access Grants are not inherited when the delegation is made. Additionally, Charge Codes access is not transferred from the delegator to the delegatee.

A Resource designated as a Manager can also perform implicit delegations. Managers are able to edit Time Sheets of their direct reports, provided they have the Edit Time Sheet Access Grant.

*Figure 2-8* illustrates a delegation on the Time Sheet Approval Details page.

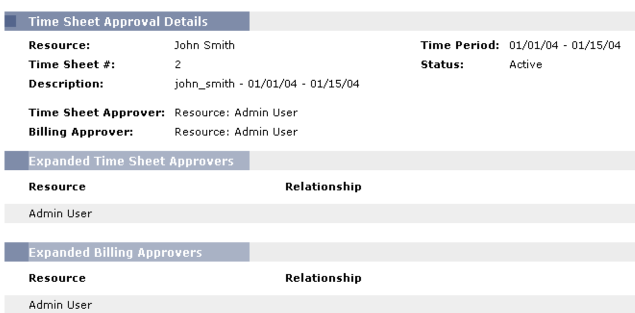



*Figure 2-8 Time Sheet Approval Details page*

# Override Rules

Override Rules are designed to “override” default cost rates and other default cost related attributes. All Override Rules consist of two parts:

- Dependencies
  The attributes required to initiate an Override Rule.

- Results
  The resulting action when an Override Rule’s dependencies are met.

For example, all time worked on a specific Project (the dependency) sets that time worked to a specific cost rate (the result). Override Rules are set in the Override Rule window of the Mercury IT Governance Workbench, as shown in *Figure 2-9*.

Override Rules are applied to the individual lines of a Time Sheet. When the line of a Time Sheet meets the dependencies of an Override Rule, the Override Rule’s results are initiated for that line item.

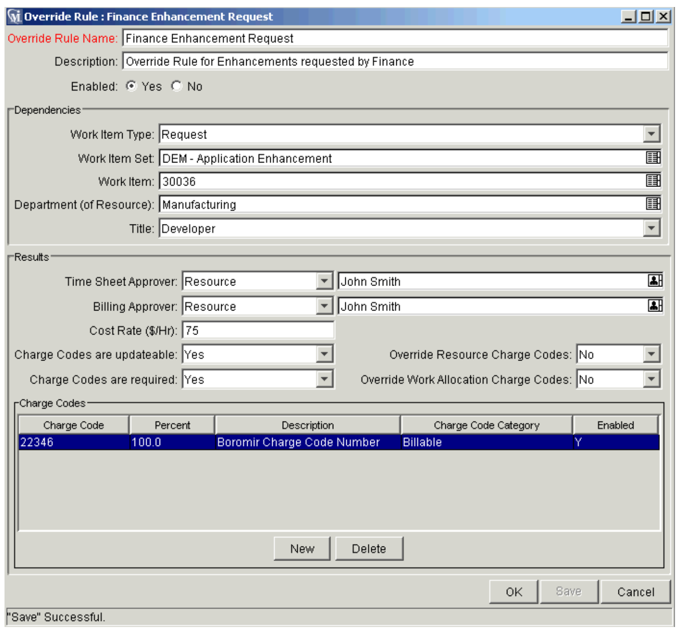



*Figure 2-9 Override Rule window*

# Chapter 3 Process Overview

This chapter details the Time Management process steps. Time Management is designed to follow a standard process.

This chapter covers the following topics:

- *Time Management Process Overview*
- *Entering Work Allocations*
- *Entering Time Sheet Information*
- *Approving Time Sheets*
- *Freezing Time Sheets*
- *Billing or Charging with 3rd Party Application*
- *Closing Time Sheets*

## Time Management Process Overview

Time Management is designed to follow a standard process. *Figure 3-1* illustrates the Time Management process.

**The Time Management Process:**

1. *Entering Work Allocations*
   Managers or planners budget time for a specific Work Item.

2. *Entering Time Sheet Information*
   Resources enter and update actual time on a Time Sheet. Time Sheets are then Released or Cancelled.

- *Cancelling Time Sheets*
  Resources can cancel Time Sheets.

3. *Approving Time Sheets*
   Released Time Sheets are reviewed. A reviewed Time Sheet is then Rejected (returned to the Resource) or Approved.

4. *Freezing Time Sheets*
   Approved Time Sheets are Frozen. Freezing a Time Sheet allows for data extraction and reporting to begin.

5. *Billing or Charging with 3rd Party Application*
   Extracted data can be sent to 3rd Party financial applications.

6. *Closing Time Sheets*
   Once a Time Sheet is frozen, data extracted and other external activities completed, the Time Sheet is closed and final reports can be generated.

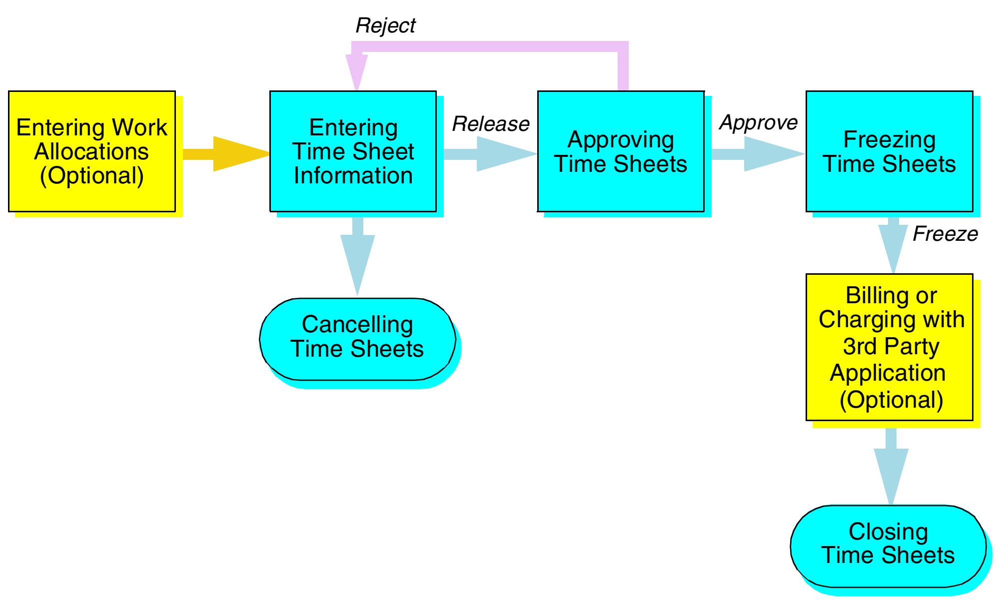



*Figure 3-1 Time Management Process Overview*

# Entering Work Allocations

Managers or planners can create Work Allocations. Work Allocations specify the amount of time to be spent on a Work Item. Managers or planners also specify which Resources can allocate time on a Work Item and where to charge the time worked.

Based on system configurations, Work Allocations might or might not be used. See *"Entering and Updating Work Allocations"* on page 23 for more information.

Note

If Work Allocations are not used, Time Management is simply used to track actual time worked.

# Entering Time Sheet Information

Individual Resources create and update Time Sheets. These Resources specify which Work Items were worked on in a given Period, how much time was spent on the Work Item, and (optionally) what types of Activities were performed. See *"Entering and Releasing Time Sheets"* on page 39 for more information.

## Cancelling Time Sheets

Individual Resources cancel Time Sheets. Only 'Active' Time Sheets can be cancelled. Once a Time Sheet has been cancelled, it cannot be reopened or updated. See *"Cancelling Time Sheets"* on page 56 for more information.

# Approving Time Sheets

Once a Resource has entered and released a Time Sheet, other individuals need to review and approve the Time Sheet. If approved, Time Sheets move forward to the final steps in the process. See *"Reviewing and Approving Time Sheets"* on page 63 for more information. If rejected, the Time Sheet goes back to the original Resource for updating or additional justification.

# Freezing Time Sheets

Even after a Time Sheet is approved, a period of time can be allowed for additional updates and re-approvals. However, at some point, the Time Sheet will 'freeze'. This allows actual reporting on the Time Sheet's information or extracting the information for a billing or financial system. See *"Freezing and Closing Time Sheets"* on page 69 for more information.

## Billing or Charging with 3rd Party Application

After a Time Sheet is frozen, costs can be generated to bill an internal or external customer. While Time Management does not explicitly perform this billing function, it does create the links between Work Items and Charge Codes. This allows time information to be extracted for use by third party financial applications.

## Closing Time Sheets

Once a Time Sheet has been frozen, and data extraction or other external activity performed, the Time Sheet is 'closed' and its status is update for reporting purposes. See *"Freezing and Closing Time Sheets"* on page 69 for more information.

# Chapter 4

# Configuring the Time Management Dashboard Page

This chapter details common user procedures for Time Management. Once Time Management is activated on a system, the **Time** menu is accessible and the Time Management Dashboard page can be added to the Dashboard.

This chapter covers the following topics:

- *Accessing the Time Management Menu Group*
- *Setting Up the Time Management Dashboard Page*

## Accessing the Time Management Menu Group

Time Management process steps are performed using the menu items of the **Time** menu. Once Time Management is activated on a system, the **Time** menu automatically appears on a Dashboard's Menu bar. *Figure 4-1* displays the **Time** menu.

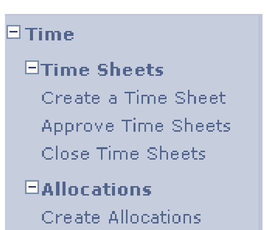



*Figure 4-1 Time menu*

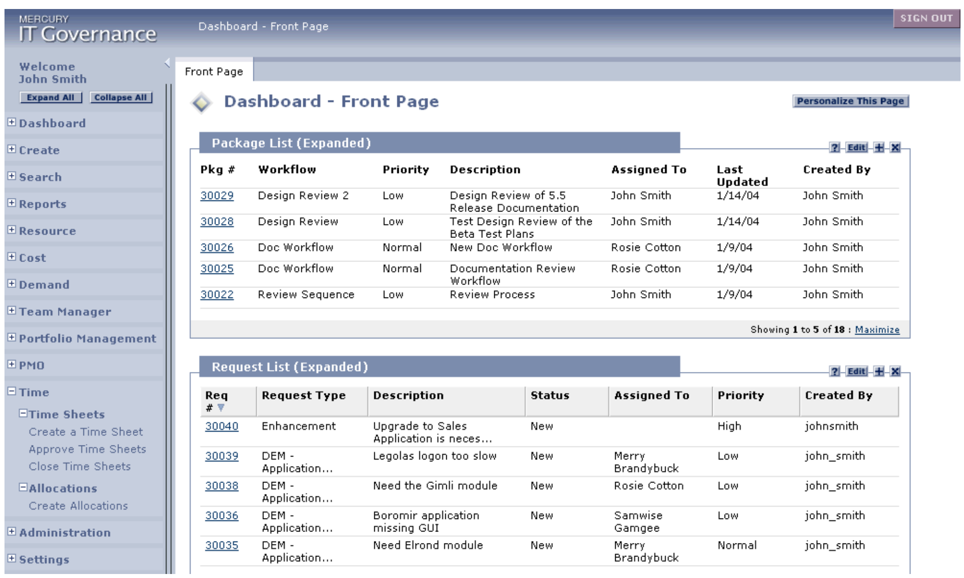
> **Note**
>
> If Time Management is activated on a system, and the **Time** menu is not present, refresh the Dashboard. If the **Time** menu is still not present, see the application administrator.

# Setting Up the Time Management Dashboard Page

This section details the steps required to add the Time Management Dashboard page to a Dashboard. The Time Management Dashboard page comes with a seeded set of Portlets and can be personalized by the owner of the Dashboard.

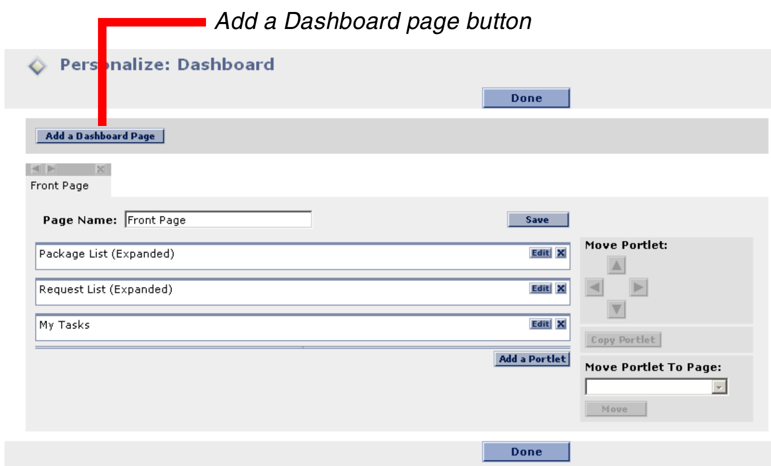
**To add the Time Management Dashboard page to the Dashboard:**

1. Logon to the Dashboard.




2. On the Dashboard page, click **Personalize This Page**.

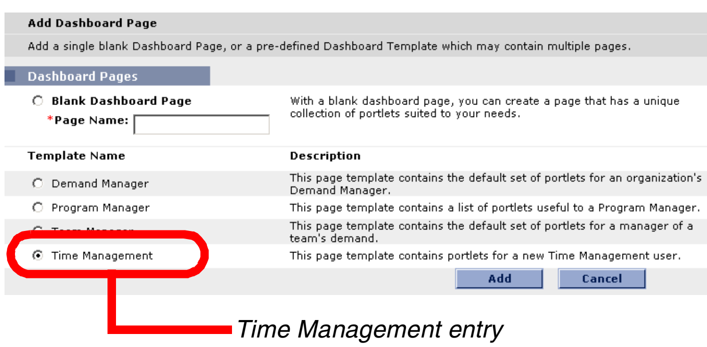
   The Personalize: Dashboard page opens.




3. Click **Add a Dashboard Page**.

   The Add Dashboard Page opens.

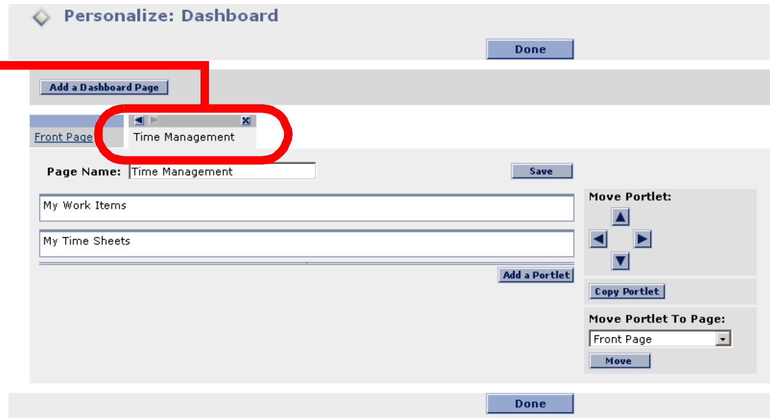
4. Select the Time Management radio button.




5. Click **Add**.

   The Personalize: Dashboard page reloads with the Time Management Dashboard page.

*Time Management Dashboard page selected.*

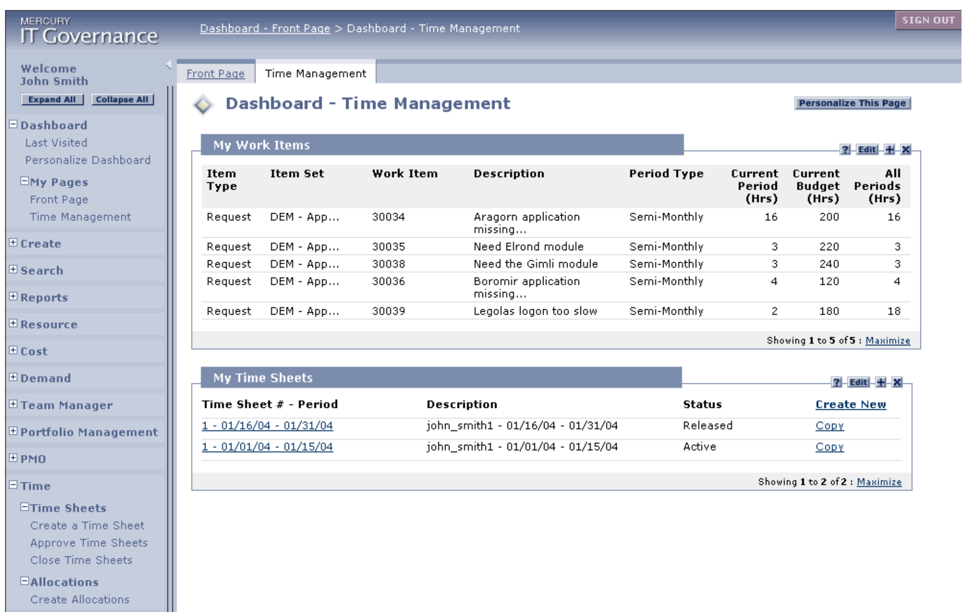



6. Arrange the Time Management Dashboard page.

   The Time Management Dashboard page can be moved using the arrow buttons on the tab.

7. Click **Done**.

   The Time Management Dashboard page is added to the Dashboard.




> **Note:** For complete instructions on how to add and personalize Dashboard pages and Portlets, see Using the Dashboard.

Chapter

5

# Entering and Updating Work Allocations

This chapter details how to create and update Work Allocations in Time Management. Individual Managers and Planners can enter budgeted time for specific Work Items through the Create Allocations page.

This chapter covers the following topics:



## Creating New Work Allocations

This section details how to create a new Work Allocation. Creating Work Allocations requires the Create Work Allocations page. Work Allocations are created for specific Work Items. Before creating a Work Allocation, the Work Item must exist.

**To create a new Work Allocation:**

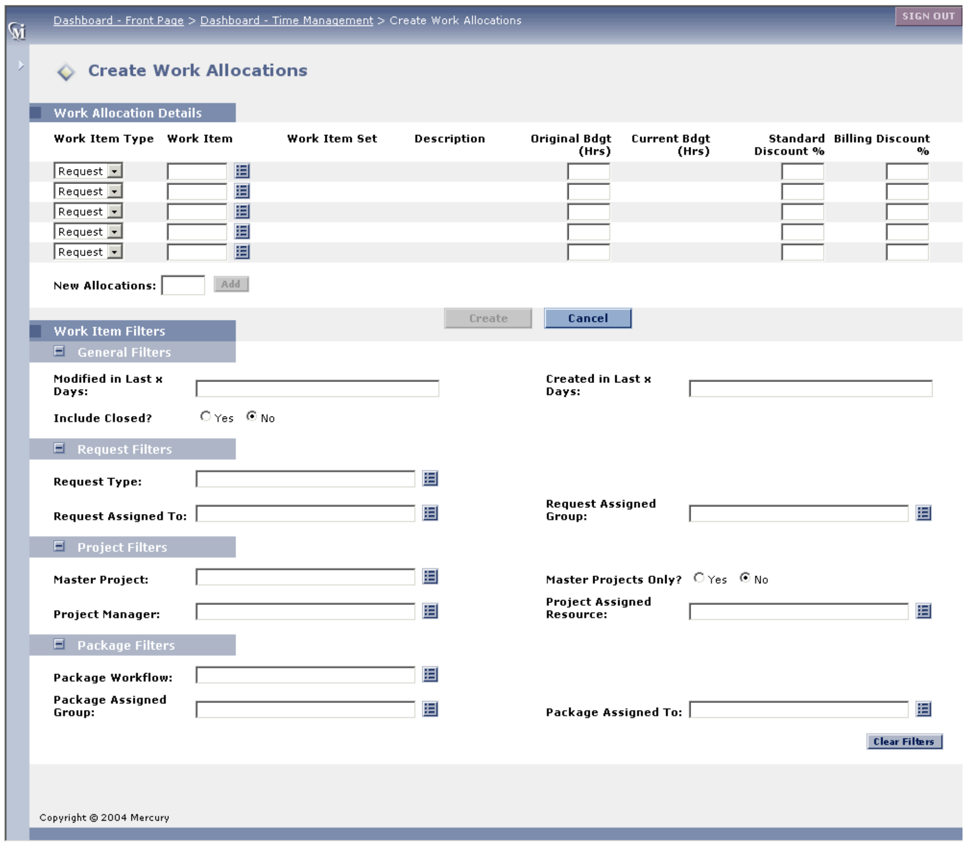
1. Logon to the Dashboard.
2. Open the Create Work Allocations page.

- From the Menu bar, select **Create > Allocations**

or

- From the Menu bar, select **Time > Allocations > Create Allocations**

The Create Work Allocations page opens.




3. Navigate to a blank row in the Work Allocation Details section.

   Five rows initially exist in the Work Allocation Details section. If the number of rows in insufficient, enter the number of additional lines required in the New Allocations field and click **Add**. This adds the specified number of new rows to this section.

4. Select the Work Item Type.

   The set of Work Items depends on the selection in the Work Item Type field. The possible Work Item Types are:

- Request
  A list of open Requests in Demand Management, identified by the Request Numbers.

- Package
  A list of open Packages in Change Management, identified by the Package Numbers.

- Task
  A list of Project Tasks in Project Management, identified by the Task Names.

- Project
  A list of open Master Projects or Subprojects in Project Management, identified by the Project Names.

- Misc
  A list of miscellaneous Work Items.

5. Select the Work Item from the Work Item auto-complete list.

Note

If the Work Item list is too long, use the Work Item Filters section to shorten the listed Work Items. This is useful when searching for an exact Work Item. For more information concerning the Work Item Filters section, see *"Using Filters in the Work Allocation Pages"* on page 35.

The following information-only columns are automatically updated based on selections in the Work Item auto-complete list.

- Work Item Set
  Displays the Work Item Set of the Work Items selected.
  - For Request Work Items, this column shows the specific Request Type.
  - For Package Work Items, this column shows the Workflow used by the Package.
  - For Project and Task Work Items, this column shows the Master Project.

- Description
  Displays the value in the Description field for the given Work Item, truncated to 50 characters.

6. Enter the budgeted time in Original Bdgt (hrs).

   Enter the amount of time in hours in Original Bdgt (hrs) field. Enter values up to one-tenth of an hour.

   The following information-only fields are automatically updated based on selections in the Original Bdgt (hrs) field.

   - Current Bdgt (hrs)
     Automatically updated based on the value provided in Original Bdgt (hrs). During the life cycle of this allocation, make any changes to the budgeted time needed for the Work Item in Current Bdgt (hrs). Changes to Original Bdgt (hrs), which gives visibility to changes in budget from initiation, are restricted because it's an important metric when examining planning and estimation accuracy.

   - Actuals to Date (hrs)
     Automatically updated. If work has already been performed and time entered against the specific Work Item, this non-editable field displays the total amount entered across all Resources and all time periods for non-cancelled Time Sheets.

7. Enter the Standard Discount %.

   If Time Management is used to gather charge back information, the cost rate for the Resources might be different than the standard rate. For this case, a pre-negotiated discount rate can be entered. This discount rate is used when calculating total costs (actual time worked times the Resource cost rate).

   Normally this field is either 0% (standard cost rate or no billing is performed) or 100% (no charge for this Work Item).

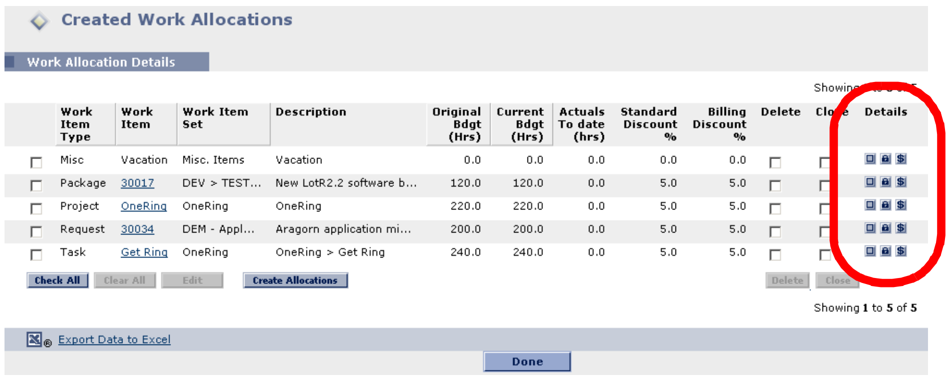
8. Enter the Billing Discount %.

   Cost overruns sometimes require charges to be re-negotiated. The Billing Discount % field sets a pre-billing discount rate for all work performed for the Work Item. For example, if the costs of a given Project went over by 20%, an additional billing discount of 10% might be set.

When calculating the total cost for a Work Item, both the Standard Discount % as well as the Billing Discount % are used. For example, if both Standard Discount % and Billing Discount % are 10%, the total discount would be 19% (100%-[(100%-10%)*(100%-10%)]).

9. Click **Create**.

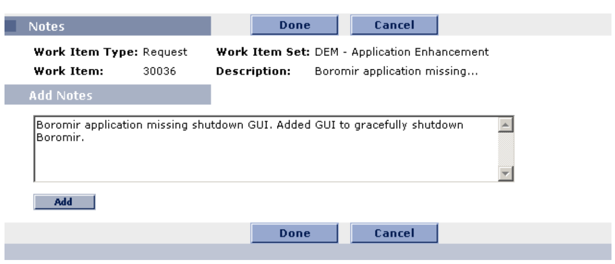
   The Work Allocation is created and the Created Work Allocations page opens.




10. Enter any additional details in the Details Column.

    Enter detailed information regarding the new Work Allocation by clicking the available icons. The following lists the available icons:

    - (Notes)
      The icon opens the Work Allocation Notes page. The Work Allocation Notes page adds free form notes to the Work Allocation. Enter information in the text area. Click **Add** for each new note. Click **Done** to close the Work Allocation Notes page.




    - (Resource Access)
      The icon opens the Work Allocation Resource Access Information page.

Using this page assigns specific Resources to a Work Allocation. To set specific Resources to a Work Allocation:

i. Click the icon to open the Work Allocation Resource Access Information page.

ii. Select Restrict Access to Resources and Groups listed below.

iii. Select the Resources from the Resource auto-complete list.

iv. Select the Resource Groups from the Group auto-complete list.

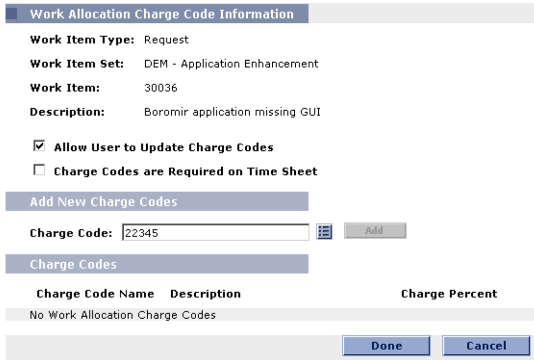
v. Click Add.

The Resources and Resource Groups are added to the Existing and New Allowed Resources and Groups section.

vi. Click **Done** to save the selection and close the window.


- (Charge Codes)
  The icon opens the Work Allocation Charge Code Information page. This page is used to specify the Charge Codes to use for time billed against a Work Item. This page also sets the percentage breakdown to use to distribute the total calculated cost to the various Charge Codes.

  To add a Charge Code, select the code from the Charge Code auto-complete list and click **Add**. This adds the Charge Code to the list in the Charge Codes section. Within this section, specify the percentage allocations for each code. Percentages can be specified to a tenth of a percent but the values must total 100%. Click **OK** to save the selection and close the window.




11. Click **Done.**

    The additional information is added to the Work Allocation.

# Searching for Existing Work Allocations

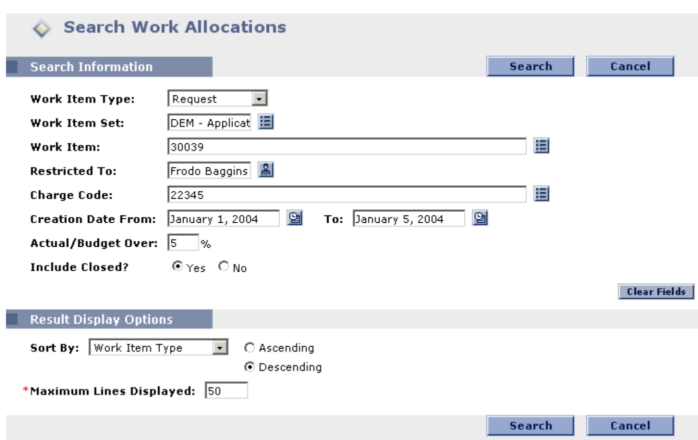
This section details how to search for existing Work Allocations. Searching for Work Allocations requires the Search Work Allocations page.

**To search for an existing Work Allocation:**

1. Logon to the Dashboard.

2. From the Menu bar, select **Search > Allocations**.

   The Search Work Allocations page opens.



3. Enter search criteria in the Search Information fields using the parameters listed in *Table 5-1*.

*Table 5-1. Search Work Allocations Search Information Parameters*

| Parameter | Description |
|---|---|
| Work Item Type | Limits the search to Work Allocations for a single type of Work Item (Requests, Packages, Projects, or Tasks). |
| Work Item Set | Limits the search to Work Allocations for a specific Request Type, a specific Master Project, or a specific Package Workflow. |
| Work Item | Limits the search to Work Allocations for a specific Work Item. This will at most return a single Work Allocation. |
| Restricted To | Limits the search to Work Allocations that have been restricted to a specific Resource. |
| Charge Code | Limits the search to Work Allocations that have been linked to a specific Charge Code. |
| Creation Date From/To | Limits the search to Work Allocations created within a specific date range. |
| Actual/Budget Over | Limits the search to Work Allocations where the Actual Hours divided by the Current Budgeted Hours is greater than a specified percentage. |
| Include Closed | Include Closed Work Allocations in the search. |

4. Enter display criteria in the Results Display Options fields using the parameters listed in *Table 5-2*.

*Table 5-2. Search Allocations Results Display Options Parameters*

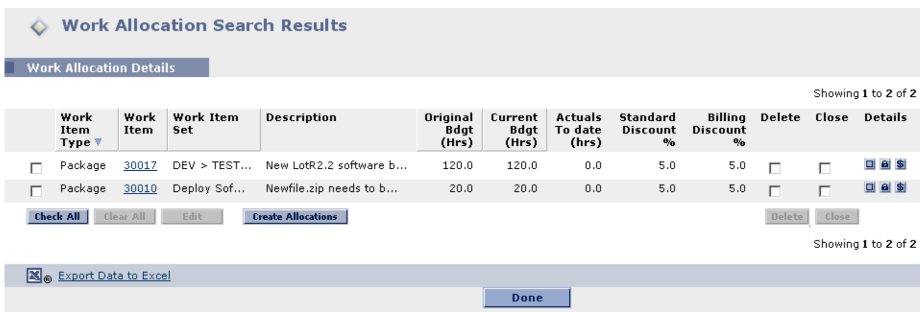
| Parameter | Description |
|---|---|
| Sort By | The parameter to sort the returned items. The sort parameters are:<br>• Work Item Type<br>• Work Item Set<br>• Work Item<br>• Original Budget (Hrs)<br>• Current Budget (Hrs) |

*Table 5-2. Search Allocations Results Display Options Parameters [continued]*

| Parameter | Description |
|---|---|
| Ascending/ Descending | Display the results in Ascending or Descending order. |
| Maximum Lines Displayed | Set the maximum number of results to display in the Portlet. The default is 50. |

5. Click **Search** to start the search.

   Work Allocations matching the search criteria are displayed on the Work Allocation Search Results page.




6. Once an existing Work Allocation is located, the Work Allocation can be:

   - Updated
     See *"Updating Existing Work Allocations"* on page 31.
   - Deleted
     See *"Deleting Existing Work Allocations"* on page 33.
   - Closed
     See *"Closing Existing Work Allocations"* on page 34.

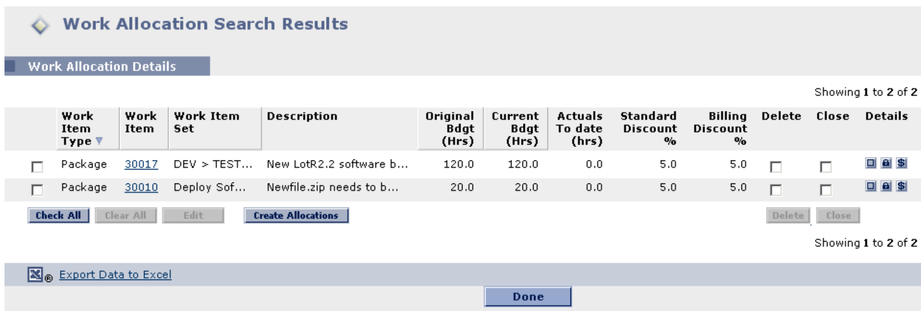
# Updating Existing Work Allocations

This section details how to update existing Work Allocations. Updating Work Allocations requires the Edit Work Allocations page.

**To update an existing Work Allocation:**

1. Logon to the Dashboard.
2. Search for existing Work Allocation.

   See *"Searching for Existing Work Allocations"* on page 29 for detailed instructions on how to search for existing Work Allocation. Any Work Allocations matching the search criteria are displayed on the Work Allocation Search Results page.

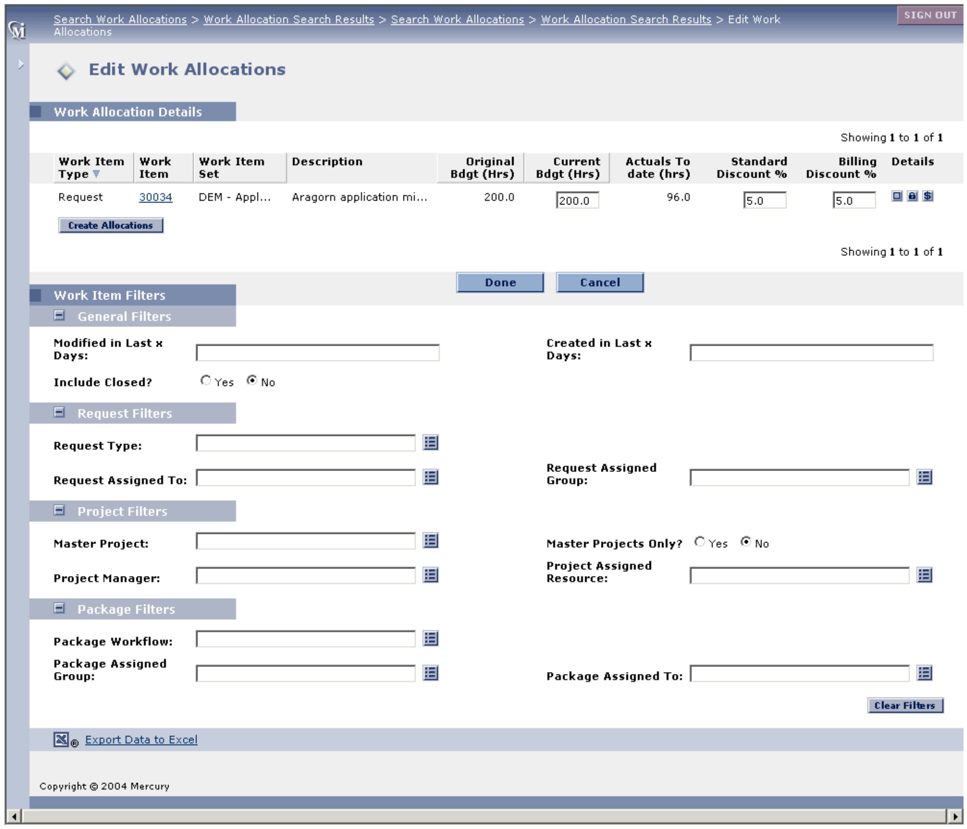



3. Select the Work Item's checkbox.

   To update all of the displayed Work Allocations, click **Check All**. All of the listed Work Allocations are selected.

4. Click **Edit**.

   The Edit Work Allocations page opens.



5. Update the Work Allocations.

   For information concerning the Edit Work Allocations fields, see *"Creating New Work Allocations"* on page 23.

6. Click **Done**.

   The updates to the Work Allocation are saved.

# Deleting Existing Work Allocations

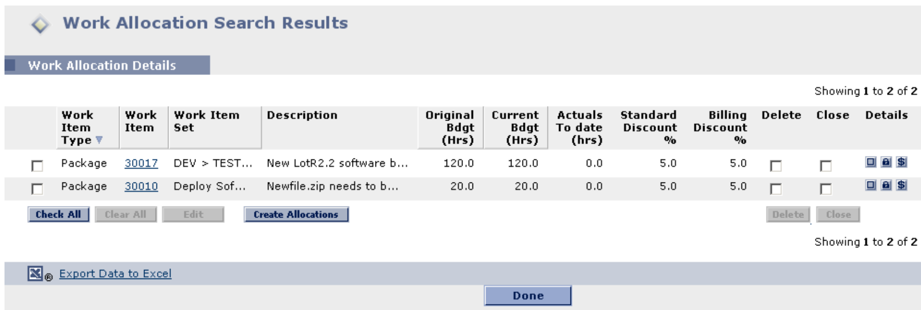
This section details how to delete an existing Work Allocation. Deleting Work Allocations is done from the Work Allocation Search Results page.

**To delete an existing Work Allocation:**

1. Logon to the Dashboard.

2. Search for existing Work Allocations.

   See *"Searching for Existing Work Allocations"* on page 29 for detailed instructions on how to search for existing Work Allocation. Any Work Allocations matching the search criteria are displayed on the Work Allocation Search Results page.




3. Select the Work Allocation in the Delete column checkbox.

4. Click **Delete**.

   The Work Allocation is deleted.

Note

Work Allocations that have time logged against them can not be deleted.

Users can only delete work allocations they created (unless they have the Time Mgmt: Manage Work Allocations Access Grant).

# Closing Existing Work Allocations

This section details how to close an existing Work Allocation. Closing Work Allocations requires the Work Allocation Search Results page.

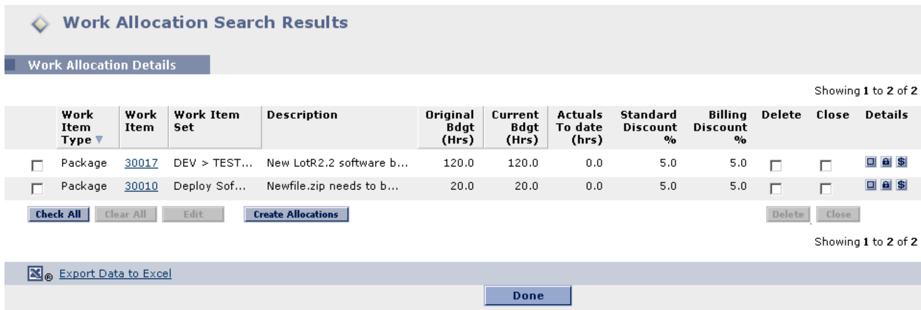
**To close an existing Work Allocation:**

1. Logon to the Dashboard.

2. Search for existing Work Allocations.

   See *"Searching for Existing Work Allocations"* on page 29 for detailed instructions on how to search for existing Work Allocation. Any Work

Allocations matching the search criteria are displayed on the Work Allocation Search Results page.



Work Allocation Search Results

Work Allocation Details

Showing 1 to 2 of 2

| | Work Item Type | Work Item | Work Item Set | Description | Original Bdgt (Hrs) | Current Bdgt (Hrs) | Actuals To date (hrs) | Standard Discount % | Billing Discount % | Delete | Close | Details |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Package | 30017 | DEV > TEST... | New LotR2.2 software b... | 120.0 | 120.0 | 0.0 | 5.0 | 5.0 | | | |
| | Package | 30010 | Deploy Sof... | Newfile.zip needs to b... | 20.0 | 20.0 | 0.0 | 5.0 | 5.0 | | | |

Check All | Clear All | Edit | Create Allocations | Delete | Close

Showing 1 to 2 of 2

Export Data to Excel

Done

3. Select the Work Allocation in the Close column checkbox.

4. Click **Close**.

   The Work Allocation is closed. After the Work Allocation is closed, the Work Item can no longer be entered on new Time Sheets.

Note

Users can close a Work Allocation if they:

- Created the work allocation, or
- Have the Time Management: Manage Work Allocations Access Grant

# Using Filters in the Work Allocation Pages

When selecting a value for the Work Item field, it is important to shorten the list to a manageable number. The Work Item Filters section provides additional parameters to narrow the search for Work Items. The following sections list the filters in the Work Item Filters section:


- *"General Filters"* on page 36
- *"Request Filters"* on page 37
- *"Package Filters"* on page 37
- *"Project Filters"* on page 38

> **Note** The filters described in this section might be different for different installations.

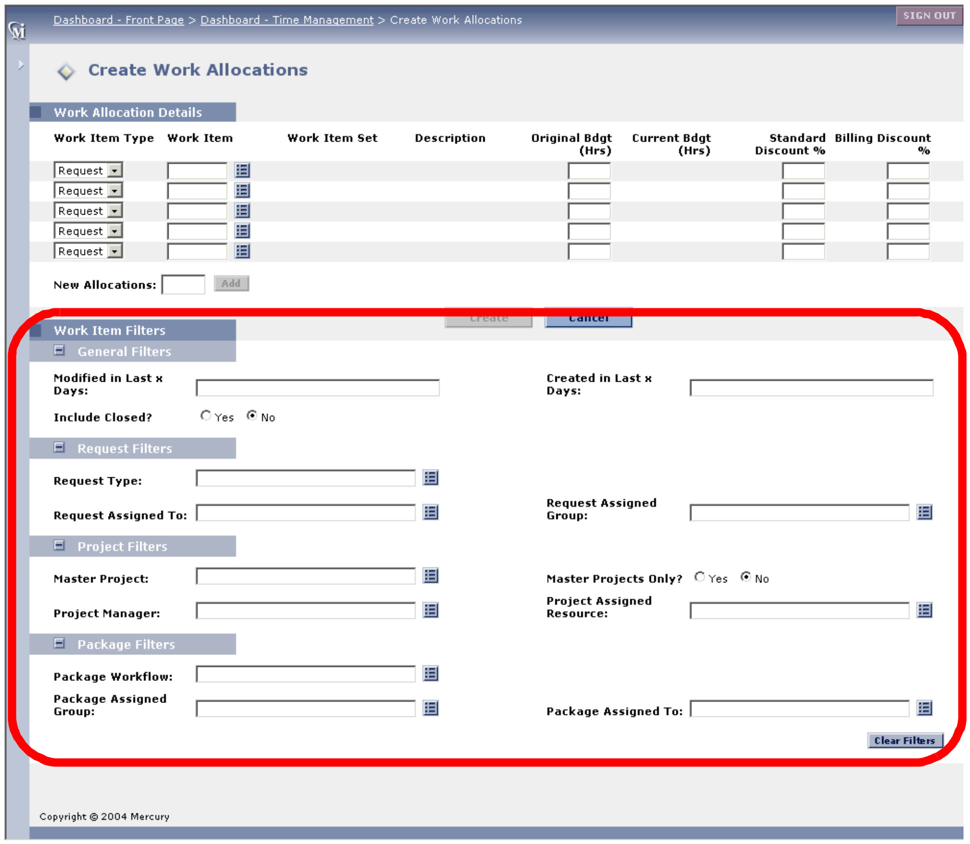



*Figure 5-1 Create Work Allocations Work Item Filters*

## General Filters

General filters are non-task specific filters. *Table 5-3* lists the General filters.

*Table 5-3. General Filters*

| Parameter | Description |
|---|---|
| Modified in Last x days | Limit the list of Work Items to those having been modified in the specified number of days. |
| Created in Last x days | Limit the list of Work Items to those having been created in the specified number of days. |

*Table 5-3. General Filters [continued]*

| Parameter | Description |
|---|---|
| Include Closed? | Determines whether to include closed Work Items in the list of returned Work Items. |

## Request Filters

Request filters are Request Work Item Type specific filters. *Table 5-4* lists the Request filters.

*Table 5-4. Request Filters*

| Parameter | Description |
|---|---|
| Request Type | Limit the list of Requests to those with a specified set of Request Types. |
| Request Assigned To | Limit the list of Requests to those assigned to a specified set of Users. |
| Request Assigned Group | Limit the list of Requests to those with the Assigned Group field value in a specified set of Security Groups. |

## Package Filters

Package filters are Package Work Item Type specific filters. *Table 5-5* lists the Package filters.

*Table 5-5. Package Filters*

| Parameter | Description |
|---|---|
| Package Workflows | Limit the list of Packages to those with a specified set of Workflows. |
| Package Assigned Group | Limit the list of Packages to those with the Assigned Group field value in a specified set of Security Groups. |
| Package Assigned To | Limit the list of Packages to those assigned to a specified set of Users. |

## Project Filters

Project filters are Project Work Item Type specific filters. *Table 5-6* lists the Project filters.

*Table 5-6. Project Filters*

| Parameter | Description |
|---|---|
| Master Project | Limit the list of Tasks or Subprojects to a specified set of Master Projects. |
| Project Assigned Resource | Limit the list of Tasks to those with an Assigned Resource in a specified list of Users. |
| Master Projects Only? | Determines whether or not to query Subprojects. |
| Project Manager | Limit the list of Tasks to those with a Project Manager identified in a specific list of Project Managers. Limit the list of Projects/Subprojects with a Project Manager in the specified list of Project Managers. |

Chapter

6

# Entering and Releasing Time Sheets

This chapter details common procedures for creating and releasing Time Sheets. Individuals can create or update their Time Sheets in the Enter Time page.

This chapter covers the following topics:



## Creating a New Time Sheet

This section details how to create a new Time Sheet. Creating a Time Sheet is done in the Create Time Sheet page.

**To create a new Time Sheet:**

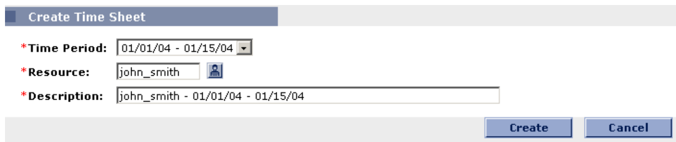
1. Logon to the Dashboard.
2. Open the Create Time Sheet page.

- From the Menu bar, select **Create > Time Sheet**.

or

- From the Menu bar, select **Time > Time Sheets > Create a Time Sheet**.

The Create Time Sheet page opens.




3. Edit the Create Time Sheet page as follows:

   - Time Period
     The Time Period for the new Time Sheet.

   - Resource
     Usually the user, unless the user has Delegation authority to create another user's Time Sheets.

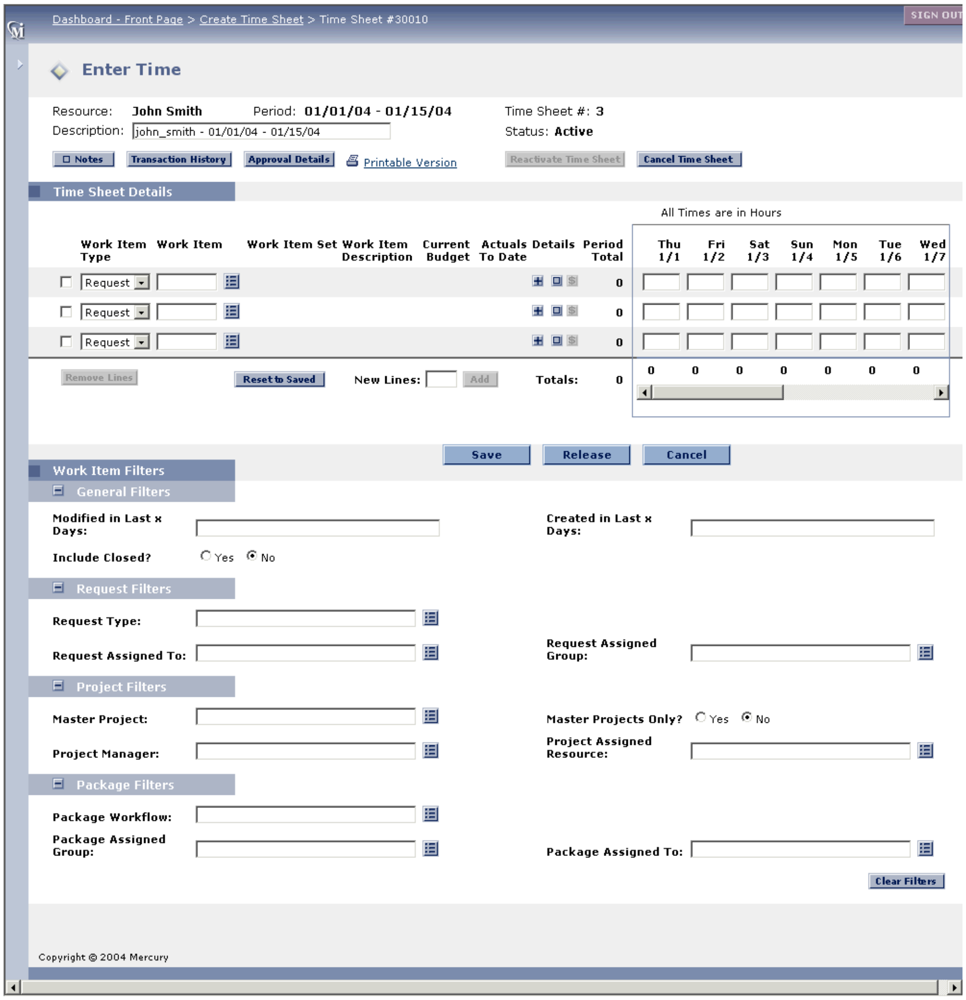
   - Description
     A description of the Time Sheet.

Note

Time Periods vary depending on individual Time Management setting.

4. Click **Create** to create the Time Sheet.

   The Time Sheet is created and the Enter Time page opens.



5. Create a Work Item line to log worked time against.

   Hours worked are logged against Work Items. Each line on the Time Sheet represents a unique Work Item. To create a line for a Work Item:

   a. Navigate to a blank row at the top of the Time Sheet Details section.

Note

To add additional blank rows, enter the number of blank lines wanted in the New Lines field and click **Add**.

   b. Select the Work Item Type.

The following lists the Work Item Types:

- Request
  A list of open Requests in Demand Management, identified by the Request Numbers.

- Package
  A list of open Packages in Change Management, identified by the Package Numbers.

- Task
  A list of Project Tasks in Project Management, identified by the Task Names.

- Project
  A list of open Master Projects or Subprojects in Project Management, identified by the Project Names.

- Misc
  A list of miscellaneous Work Items, such as vacation or meeting.

c. Select a Work Item from the Work Item auto-complete list.

Note

If the Work Item list is too long, use the Work Item Filters section to narrow the listed Work Items. This is useful when searching for an exact Work Item. For more information concerning the Work Item Filters section, see *“Using Filters in the Time Sheet Pages”* on page 58.

The following information-only columns are automatically updated based on selections in the Work Item auto-complete list.

- Work Item Set
  Displays the context of the Work Item selected.

  - For Request Work Items, this column shows the specific Request Type
  - For Package Work Items, this column shows the Workflow used by the Package
  - For Project and Task Work Items, this column shows the Master Project

- Work Item Description
  Displays the value in the Description field for the given Work Item, truncated to 50 characters. Holding the cursor over the text displays the full Description.

- Current Budget
  Displays the current total budgeted hours for all Resources for this Work Item as specified on the Work Allocation for this item, if the Work Allocation exists.

- Actuals to Date
  If work has already been performed and time entered against the specific Work Item, this non-updateable field displays the total amount of time entered across all Resources and all time periods.

6. For each Work Item, enter the time worked on a day-by-day basis.

   The Period Total field is automatically calculated. This field shows the total time for all the daily entries for the Time Sheet line.

Note

The values entered into the Time Sheet might be different depending on Resource settings. Time Management can be configured to accept time values in:

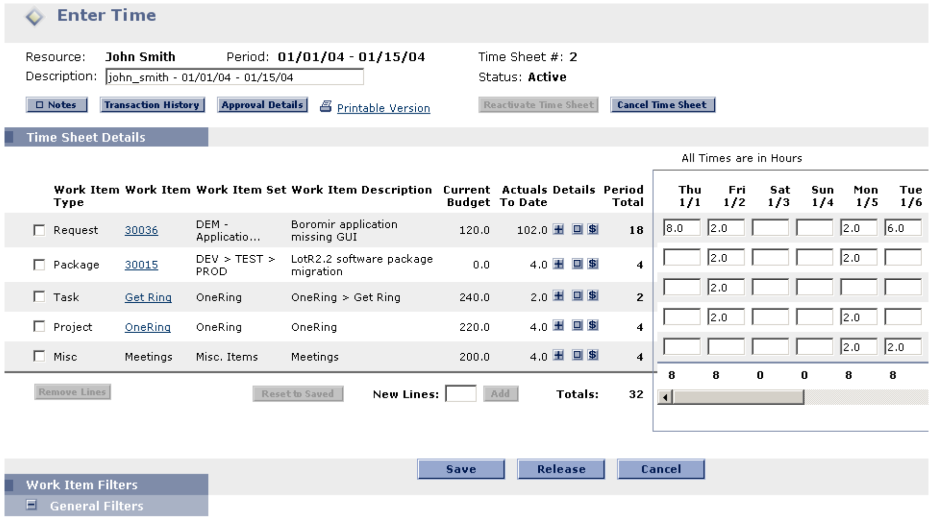
- hours per day
- hours per period
- percent per period

In this example, time is specified in hours per day. For the given period, the Enter Time page has a column for every day. For each day, enter the time worked in hours, to the tenth of an hour. Navigate to different days in the period using the navigation arrows at the bottom of the period section. If a field is blank in this section, it is assumed to be 0. Negative numbers can be entered.

Contact your application administrator for more information on Resource Time Sheet settings.

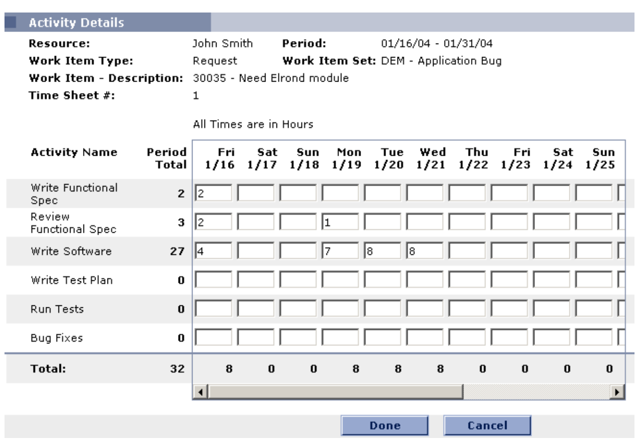
9. Enter any additional details in the Details column.

   Detailed information regarding the new Work Allocation can be entered by clicking the available icons. The following lists the available icons:



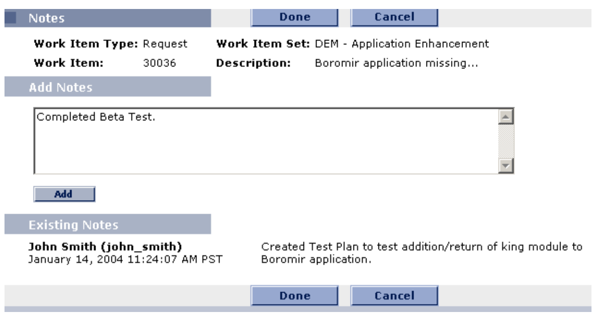

- (Activity Details)
  The icon opens the Activity Details page. Daily time worked can be entered into pre-defined Activities, such as “Writing Test Plans” and “Test Execution”. This can be useful for activity reporting and future estimation of work.

  To enter activity detailed time information, enter the appropriate time worked for each activity for each day. Navigate to different days using the navigation arrows at the bottom of the screen. Click **Done** to save the edits to the Activities Detail page. Click **Close Window** to close the Activities Detail page.



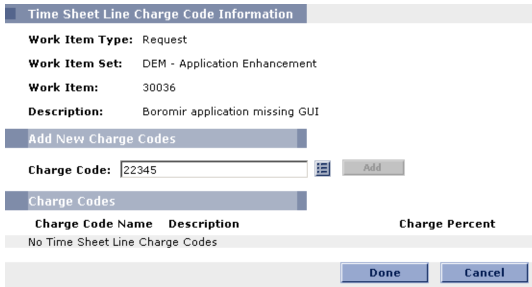
> **Note**
> If entering values in the daily fields of the Enter Time page, any existing activity detail information is erased for the specific day for that specific line.

- (Notes)
  The icon opens the Time Sheet Line Notes page. The Time Sheet Line Notes page adds free form notes to the Time Sheet line. Enter information in the text area. Click **Add** for each new note. Click **Done** to close the Time Sheet Line Notes page.




- (Charge Codes)
  The icon opens the Time Sheet Line Charge Code Information page. Use this page to specify the Charge Codes to use when charging back work done for this Work Item. This page also sets the percentage breakdown when distributing the total calculated cost to the various Charge Codes.

  To add to the list of Charge Codes for the given Time Sheet line, select the code from the Charge Code auto-complete list and click **Add**. This adds the Charge Code to the list in the Charge Codes section. Within this section, specify the percentage allocations for each code. Percentages can be specified to a tenth of a percent but the values must total 100%. Click **Done** to save the selection. Click the **Close Window** icon to close the Time Sheet Line Charge Code Information page.




10. Click **Save**.

    The new Time Sheet is saved.

# Viewing and Updating the Time Sheet Header Information

After creating a Time Sheet, various details of the Time Sheet can be viewed and updated using the Time Sheet Page Header Information buttons at the top of the Enter Time page. The following lists the Time Sheet Page Header Information buttons:

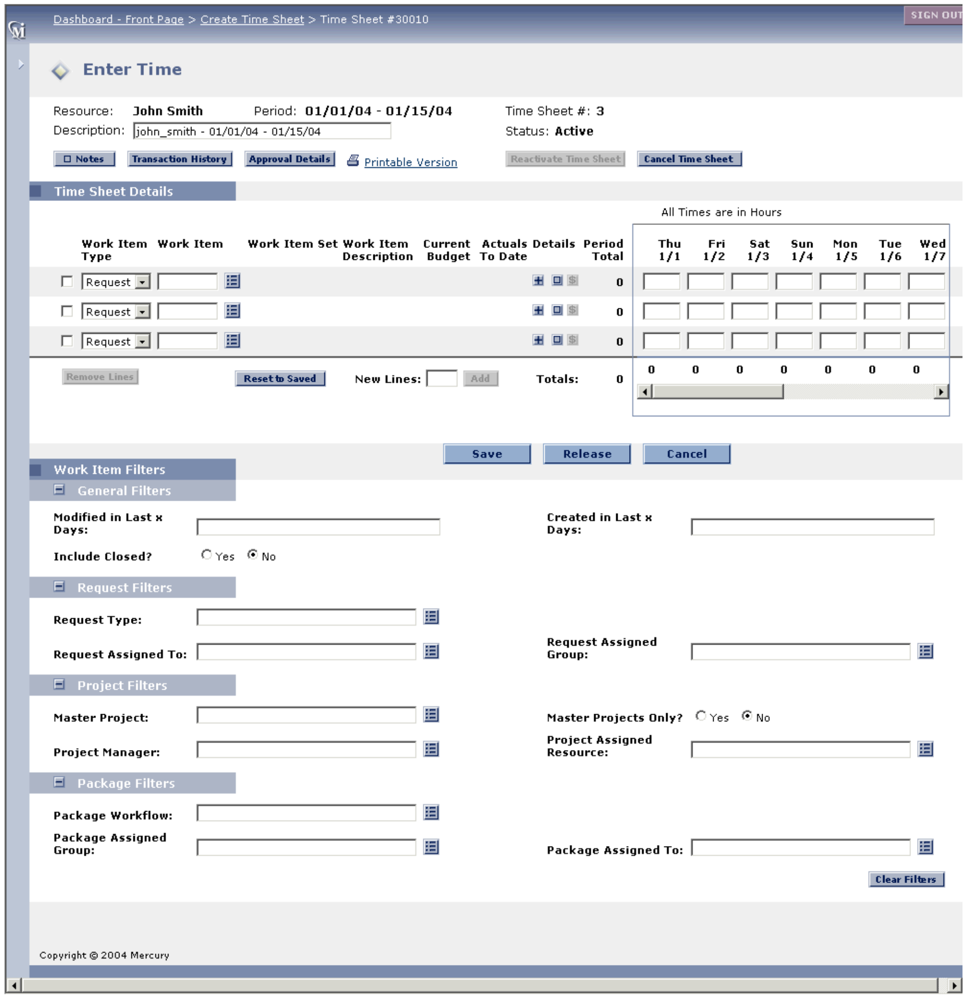



*Figure 6-1 Enter Time page*

- **Notes**
  The **Notes** button opens the Time Sheet Notes page. View existing notes and enter free form notes for the Time Sheet. Click **Add** to add the note to the Notes page. Click **Close Window** to close the page.

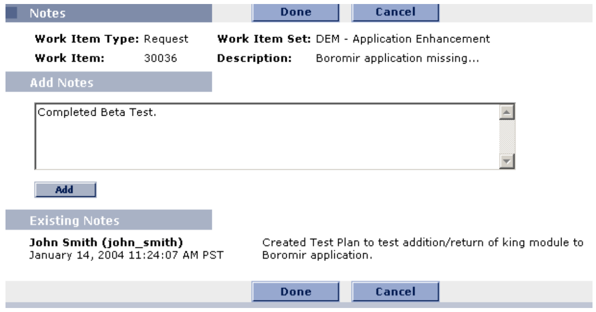



*Figure 6-2 Time Sheet Notes page*

- **Transaction History**
  The **Transaction History** button open the Time Sheet Status Transactions page. This page shows the status history of the Time Sheet, such as when it was released, approved or rejected, frozen, and closed. For each status change, the status history also lists who performed the action. This page cannot be edited.

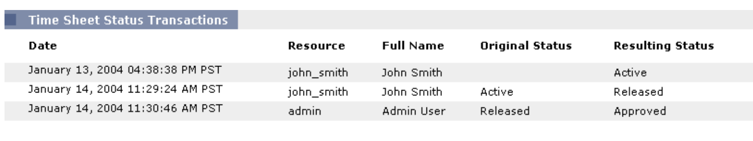



*Figure 6-3 Time Sheet Status Transactions page*

- **Approval Details**
  The **Approval Details** button opens the Time Sheet Approval Details page. View the approver or approval group for the specific Time Sheet. This value controls who can approve the Time Sheet once the Time Sheet is released. This page cannot be edited.

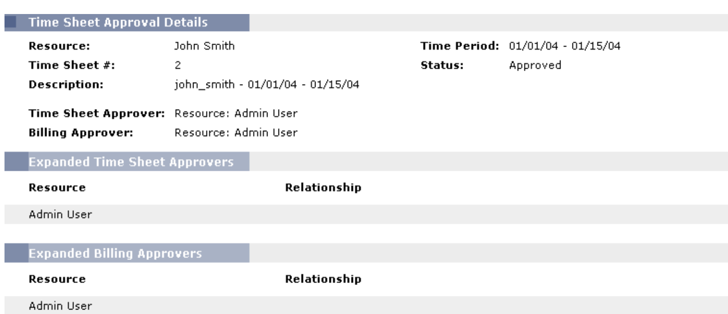



*Figure 6-4 Time Sheet Approval Details page*

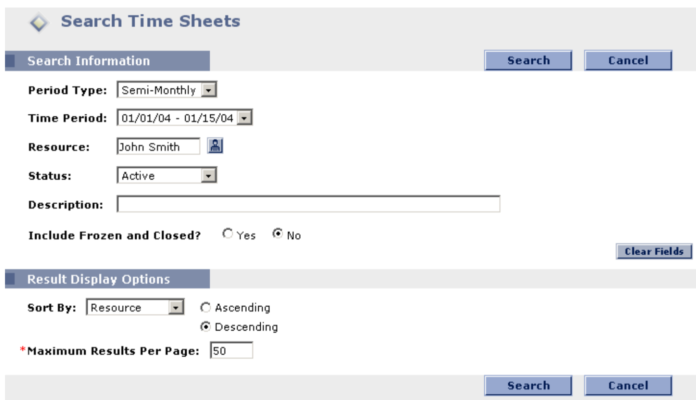
# Searching for Existing Time Sheets

This section details how to search for an existing Time Sheet. Searching for an existing Time Sheet requires the Search Time Sheets page.

**To locate and open an existing Time Sheet:**

1. Logon to the Dashboard.
2. From the Menu bar, select **Search > Time Sheets**.

   The Search Time Sheets page opens.




3. Enter search criteria in the Search Information fields using the parameters listed in *Table 6-1*.

*Table 6-1. Search Time Sheets Search Information Parameters*

| Parameter | Description |
|---|---|
| Period Type | Limit Time Sheets to those of a specific period type. |
| Time Period | Limit Time Sheets to those of a specific time period. |
| Resource | Limit Time Sheets for a specific user. |
| Status | Limit Time Sheets to those of a specific status. To Release a Time Sheet, the Time Sheet must have an Active or Rejected status. |
| Description | Limit to Time Sheets that contain a specific text string in its description. |
| Include Frozen and Closed? | Include Frozen/Closed Time Sheets as well as active Time Sheets. |

4. Enter display criteria in the Result Display Options fields using the parameters listed in *Table 6-2*.

*Table 6-2. Search Time Sheets Results Display Options Parameters*

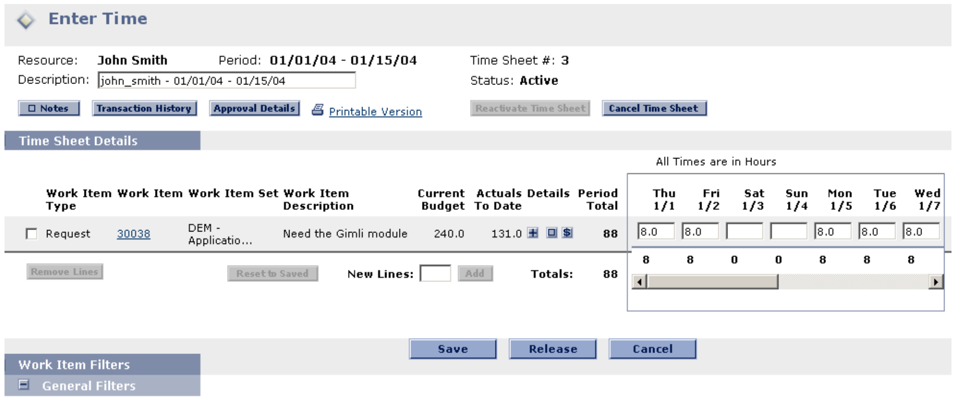
| Parameter | Description |
|---|---|
| Sort By | The parameter to sort the returned items. The sort parameters are:<br>• Resource Work Item Set<br>• Time Period<br>• Status<br>• Timesheet No |
| Ascending/ Descending | Display the results in Ascending or Descending order. |
| Maximum Lines Displayed | Set the maximum number of results to display in the Portlet. The default is 50. |

5. Click **Search** to start the search.

The results are displayed on the Time Sheet Search Results page.


6. Click Time Sheet # - Time Period to open the Time Sheet.

The Enter Time page opens.



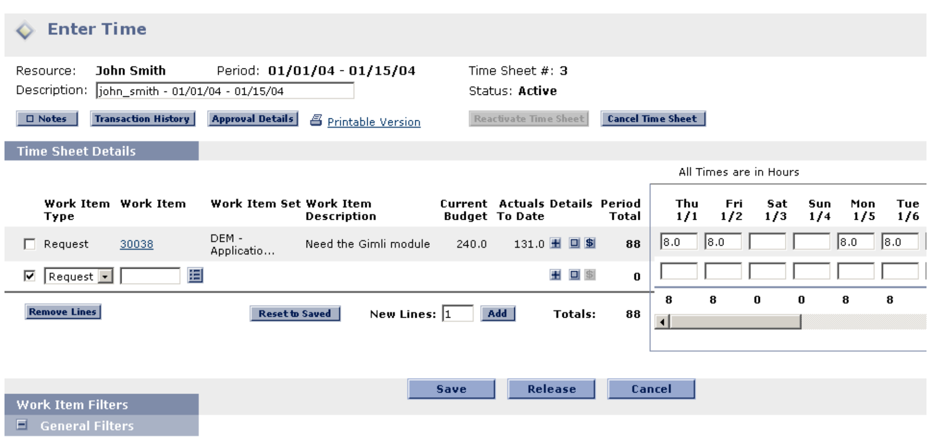

# Updating Existing Time Sheet Lines

This section details how to update an existing Time Sheet. Updating an existing Time Sheet requires the Enter Time page.

**To update an existing Time Sheet line:**

1. Logon to the Dashboard.
2. Search for the existing Time Sheet.

   See *"Searching for Existing Time Sheets"* on page 49 for instructions. The Enter Time page opens.



3. Update the Time Sheet. For information concerning the Enter Time page fields, see *"Creating a New Time Sheet"* on page 39.

4. Click **Save**.

   The changes to the Time Sheet are saved.

# Deleting Existing Time Sheet Lines

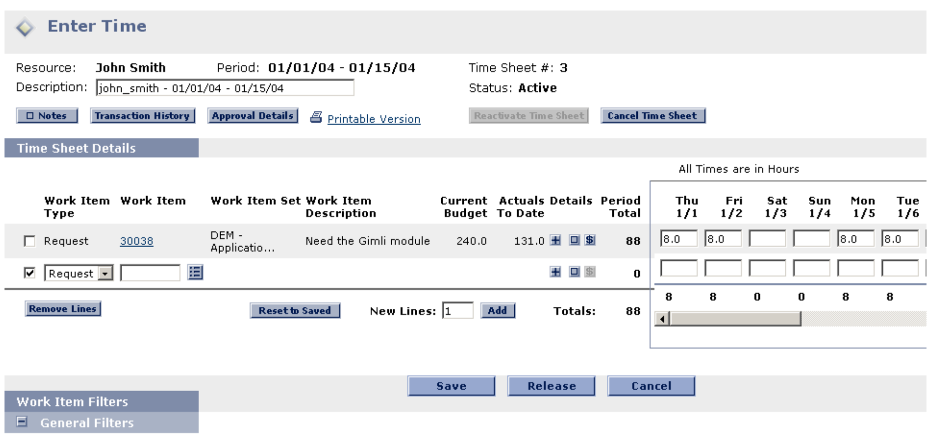
This section details how to delete an existing Time Sheet. Deleting an Existing Time Sheet requires the Enter Time page.

**To delete an existing Time Sheet line:**

1. Logon to the Dashboard.

2. Search for the existing Time Sheet.

   See *"Searching for Existing Time Sheets"* on page 49 for instructions. The Enter Time page opens.




3. Select the Work Item's checkbox.

4. Click **Remove Lines** to remove the line.

   The line on the Time Sheet is deleted.

5. Click **Save** to save the changes.

The changes to the Time Sheet are saved.

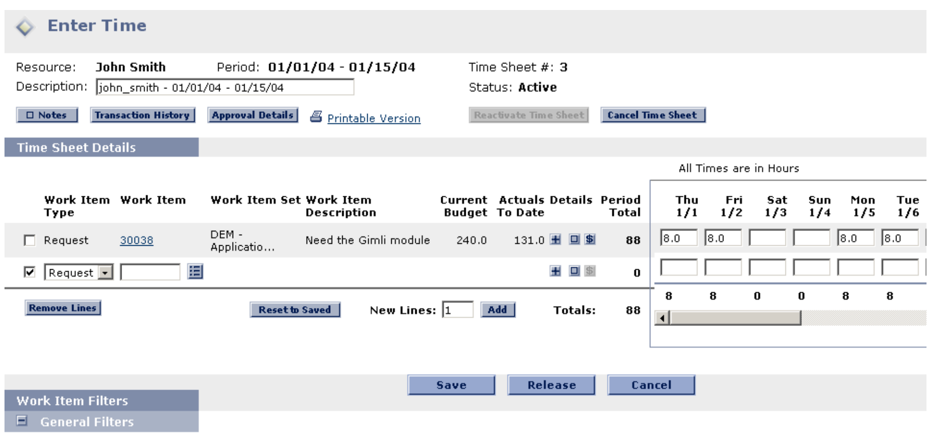
# Releasing Time Sheets

Once a Time Sheet is complete, it is ready to be released. Releasing the Time Sheet starts the review and approval process.

**To release a Time Sheet:**

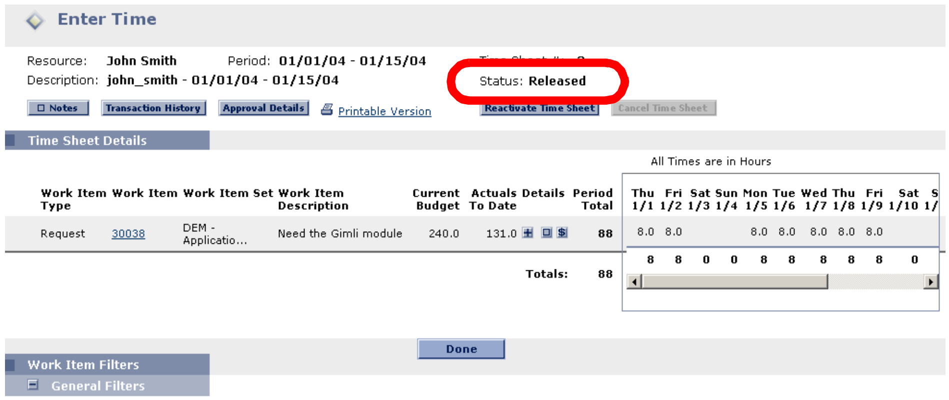
1. Logon to the Dashboard.
2. Search for a Time Sheet.

   See *"Searching for Existing Time Sheets"* on page 49 for instructions. The Enter Time page opens.



3. Click **Release** to release the Time Sheet.

   The Time Sheet's status is set to Released.




# Printing Time Sheets

The printable Time Sheet page is the printable version of the Time Sheet. Printable Time Sheet pages are divided into the following sections:

- Header
  General information concerning the Time Sheet, including the:
  - Resource
  - Time Period
  - Time Sheet Number
  - Status
  - Description
- Work Item Information
  General information concerning the Work Items worked on during the Period. Work Item information includes the:
  - Work Item Type and designation
  - Work Item Set of the Work Item
  - Description of the Work Item
  - Charge Codes for the Work Item
  - Current Budget in Hours for the Work Item

- o Actuals Hours to Date Charged to the Work Item
- o Total Hours Worked during the Time Period for the Work Item

- Time Details
  A day-by-day view of the hours worked and the Work Items charged for the work.

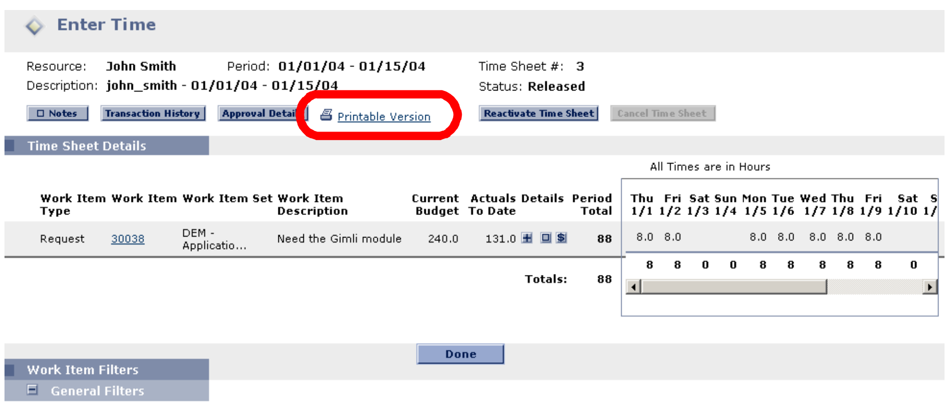
Note

If the Period Type is set to Monthly, two Time Details sections are displayed, one for the first 15 days of the month and one for the remainder of days for the month.

**To print a printable Time Sheet page:**

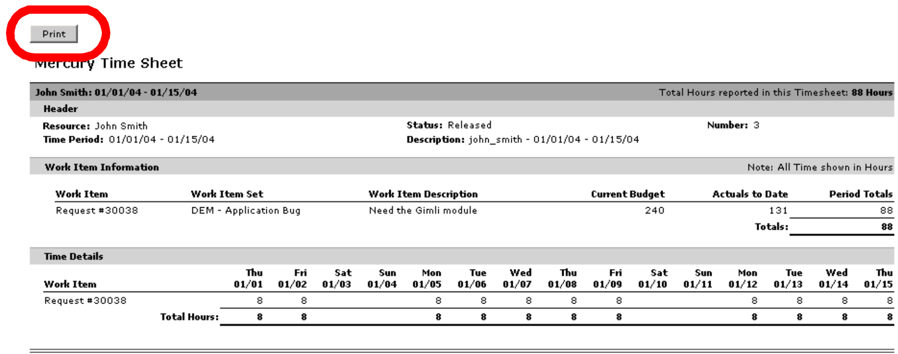
1. Logon to the Dashboard.
2. Search for an existing Time Sheet.

   See *"Searching for Existing Time Sheets"* on page 49 for instructions. The Enter Time page opens.




3. Click ( Printable Version ) **Printable Version.**

   The printable Time Sheet page opens.



Print

Mercury Time Sheet

**John Smith: 01/01/04 - 01/15/04** Total Hours reported in this Timesheet: **88 Hours**

**Header**

**Resource:** John Smith **Status:** Released **Number:** 3

**Time Period:** 01/01/04 - 01/15/04 **Description:** john_smith - 01/01/04 - 01/15/04

**Work Item Information** Note: All Time shown in Hours

| Work Item | Work Item Set | Work Item Description | Current Budget | Actuals to Date | Period Totals |
|---|---|---|---|---|---|
| Request #30038 | DEM - Application Bug | Need the Gimli module | 240 | 131 | 88 |
| | | | | Totals: | 88 |

**Time Details**

| Work Item | | Thu 01/01 | Fri 01/02 | Sat 01/03 | Sun 01/04 | Mon 01/05 | Tue 01/06 | Wed 01/07 | Thu 01/08 | Fri 01/09 | Sat 01/10 | Sun 01/11 | Mon 01/12 | Tue 01/13 | Wed 01/14 | Thu 01/15 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Request #30038 | | 8 | 8 | | | 8 | 8 | 8 | 8 | 8 | | | 8 | 8 | 8 | 8 |
| | Total Hours: | 8 | 8 | | | 8 | 8 | 8 | 8 | 8 | | | 8 | 8 | 8 | 8 |

4. On the printable Time Sheet page, click **Print**.

   The printable Time Sheet page is sent to the default printer and the printable Time Sheet page is closed.

# Cancelling Time Sheets

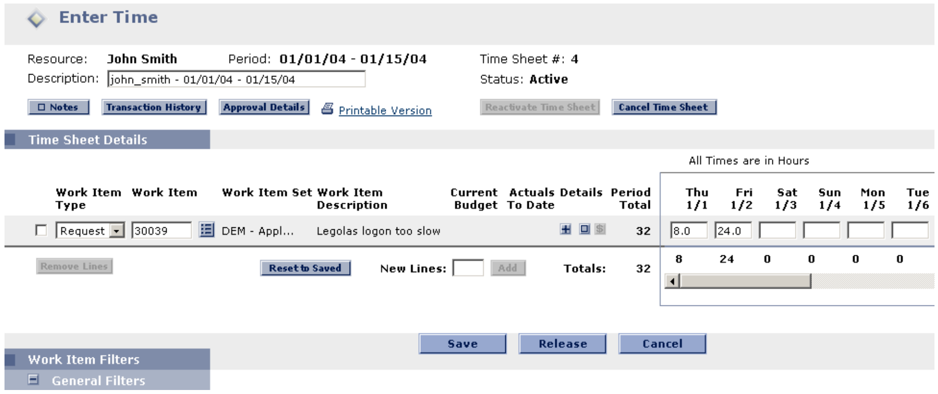
Only **Active** Time Sheets can be cancelled or released. Cancelled Time Sheets are moved to **Cancelled** status and cannot be reopened or updated. Actuals to Date hours are returned to the Current Budget.

**To cancel a Time Sheet:**

1. Logon to the Dashboard.

2. Search for the existing Time Sheet.

   See *"Searching for Existing Time Sheets"* on page 49 for instructions. The Enter Time page opens.



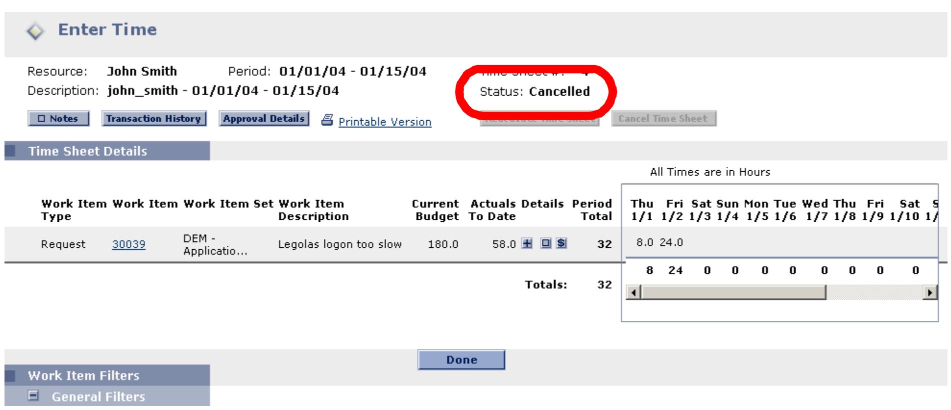

3. Click **Cancel Time Sheet** to cancel the Time Sheet.

   A Question Dialog opens.

4. Click **Cancel**.

   The Time Sheet's status is set to Cancelled.

> **Note**
> Clicking **OK** stops the Time Sheet cancellation process.



# Using Filters in the Time Sheet Pages

When selecting a value for the Work Item field, it is important to shorten the list to a manageable number. The Work Item Filters section provides additional parameters to narrow the search for Work Items. The following sections list the filters of the Work Item Filters section:

This section covers the following topics:


- *"General Filters"* on page 59
- *"Request Filters"* on page 60
- *"Package Filters"* on page 60
- *"Project Filters"* on page 60


Note

The Work Item Filters can be configured to meet specific site requirements.

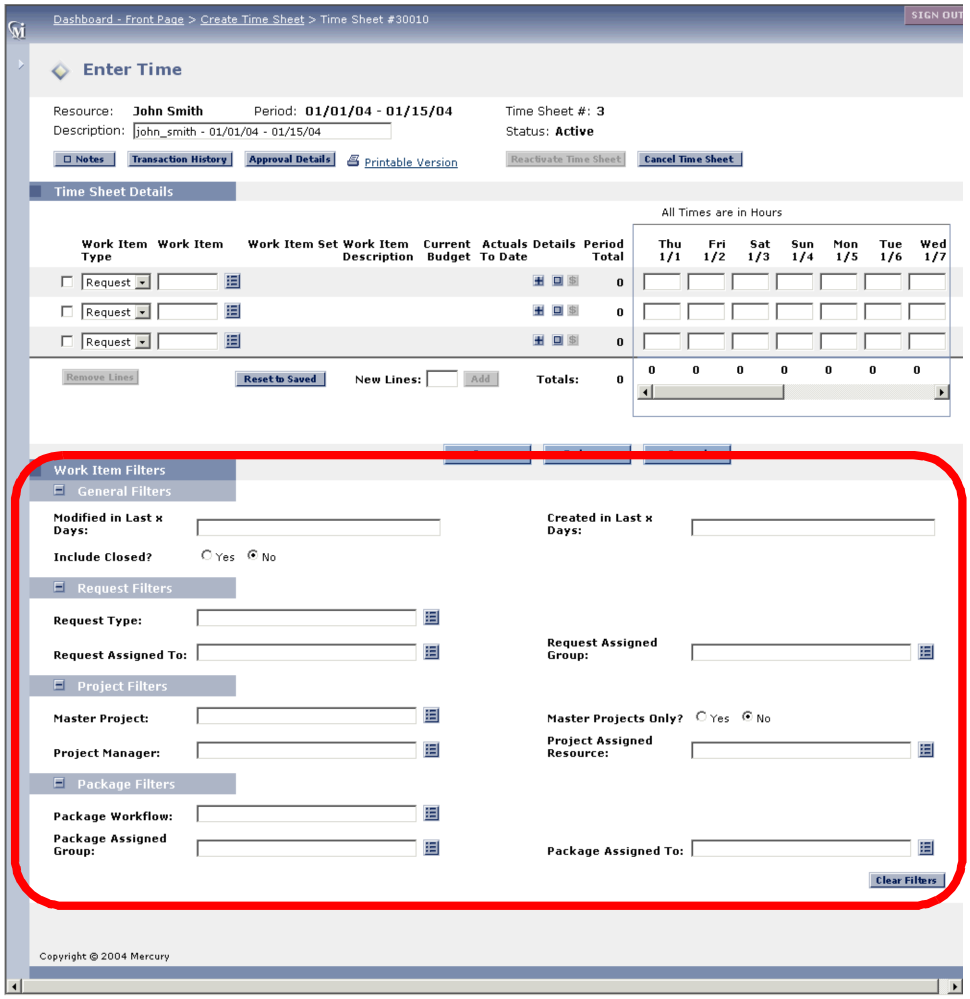



*Figure 6-5 Enter Time Work Item Filters*

# General Filters

General filters are non-task specific filters. *Table 6-3* lists the General filters.

*Table 6-3. General Filters*

| Parameter | Description |
|---|---|
| Modified in Last x days | Limit the list of Work Items to those that have been modified in the specified number of days. |
| Created in Last x days | Limit the list of Work Items to those that have been created in the specified number of days. |

*Table 6-3. General Filters [continued]*

| Parameter | Description |
|---|---|
| Include Closed? | Determines whether to include closed Work Items in the list of returned Work Items. |

## Request Filters

Request filters are Request Work Item Type specific filters. *Table 6-4* lists the Request filters.

*Table 6-4. Request Filters*

| Parameter | Description |
|---|---|
| Request Type | Limit the list of Requests to those with a specified set of Request Types. |
| Request Assigned To | Limit the list of Requests to those assigned to a specified set of Users. |
| Request Assigned Group | Limit the list of Requests to those with the Assigned Group field value in a specified set of Security Groups. |

## Package Filters

Package filters are Package Work Item Type specific filters. *Table 6-5* lists the Package filters.

*Table 6-5. Package Filters*

| Parameter | Description |
|---|---|
| Package Workflows | Limit the list of Packages to those with a specified set of Workflows. |
| Package Assigned Group | Limit the list of Packages to those with the Assigned Group field value in a specified set of Security Groups. |
| Package Assigned To | Limit the list of Packages to those assigned to a specified set of Users. |

## Project Filters

Project filters are Project Work Item Type specific filters. *Table 6-6* lists the Project filters.

*Table 6-6. Project Filters*

| Parameter | Description |
| --- | --- |
| Master Project | Limit the list of Tasks or Subprojects to a specified set of Master Projects. |
| Project Assigned Resource | Limit the list of Tasks to those with an Assigned Resource in a specified list of Users. |
| Master Projects Only? | Determines whether or not to query Subprojects. |
| Project Manager | Limit the list of Tasks to those with a Project Manager identified in a specific list of Project Managers. Limit the list of Projects/Subprojects with a Project Manager in the specified list of Project Managers. |

# Chapter 7
# Reviewing and Approving Time Sheets

This chapter details common user procedures for reviewing, approving and rejecting Time Sheets. Managers and Auditors can review Released Time Sheets and either Approve or Reject the Time Sheet.

This chapter covers the following topics:

- *Searching for Time Sheets to Approve*
- *Approving Time Sheets*
- *Rejecting Time Sheets*

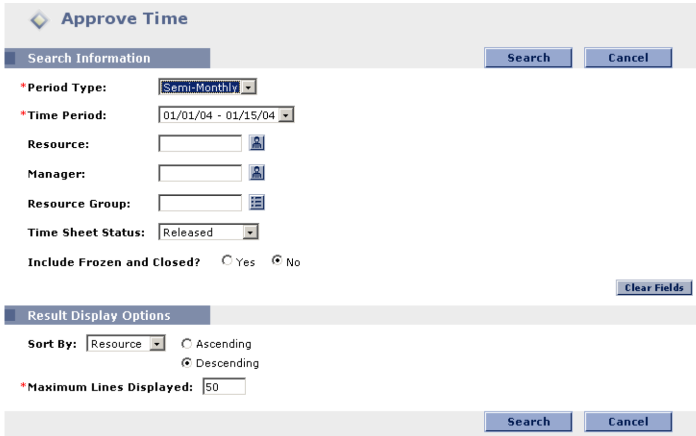
## Searching for Time Sheets to Approve

This section details how to search for and review Time Sheets. Once a Time Sheet has been released, the Time Sheet can be approved or rejected.

**To find a Time Sheet:**

1. Logon to the Dashboard.
2. From the Menu bar, select **Time > Time Sheets > Approve Time Sheets**.

   The Approve Time page opens.




3. Enter search criteria in the Search Information fields using the parameters listed in *Table 7-1*.

*Table 7-1. Approve Time Search Information Parameters*

| Parameter | Description |
|---|---|
| Period Type | Search for Time Sheets of a specific period type. |
| Time Period | Search for Time Sheets of a specific time period. |
| Resource | Search for Time Sheets for a specific user. |
| MANAGER | Search for Time Sheets of a user with a specific manager. |
| RESOURCE GROUP | Search for Time Sheets of a particular Security Group with Time Management enabled. |
| Time Sheet Status | Search for Time Sheets of a specific status. To Approve or Reject a Time Sheet, a Time Sheet must have an Released status. |
| Include Frozen and Closed? | Include Frozen and Closed Time Sheets in the search. |

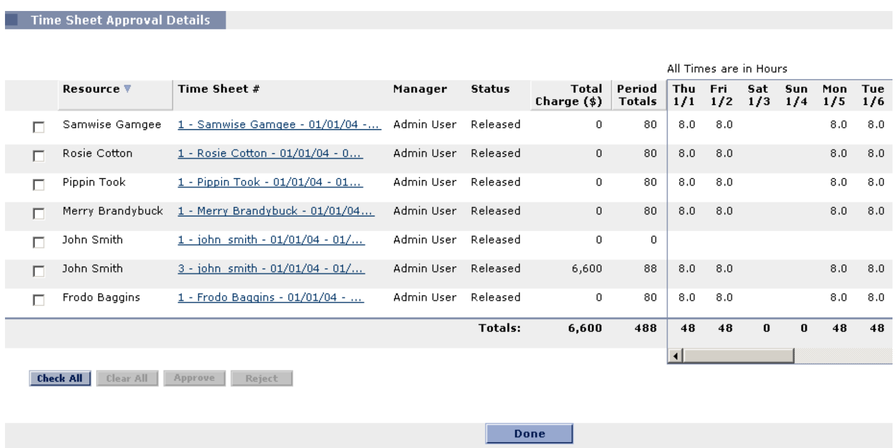
4. Enter the display criteria in the Results Display Options fields using the parameters listed in *Table 7-2*.

*Table 7-2. Approve Time Results Display Options Parameters*

| Parameter | Description |
|---|---|
| Sort By | The parameter to sort the returned items. The sort parameters are:<br>• Resource<br>• Total Hrs<br>• Total Cost |
| Ascending/ Descending | Display the results in Ascending or Descending order. |
| Maximum Lines Displayed | Set the maximum number of results to display in the Portlet. The default is 50. |

5. Click **Search** to start the Time Sheet search.

   The Time Sheet Approval Details page opens.




> **Note:** Each row in the Time Sheet Approval Details section is a unique Time Sheet ready for approval. Note that there can be multiple Time Sheets per Resource for a given time period.

6. Review the Time Sheets.

   Time Sheets are reviewed using the criteria listed in *Table 7-3*.

*Table 7-3. Time Sheet Approval Details Fields*

| Field | Description |
|---|---|
| Resource | The Resource or User assigned to the Time Sheet. |
| Time Sheet # | A sequence number for the Time Sheet, the username and the time period of the Time Sheet. The sequence number is usually '1' unless there are multiple Time Sheets for the Resource for the same time period. Click the hyperlink to get a view-only picture of the Time Sheet details. |
| Manager | The Manager for the Resource as defined in the system. |
| Status | The current status of the Time Sheet, usually Released or Rejected. Open Time Sheets are not shown. |
| Total Charge ($) | The total time entered on the Time Sheet multiplied by the adjusted hourly rates (based on source rates, defined discounts, and any override rate rules). |
| Period Totals | The total hours entered on the Time Sheet. |
| All Times are in Hours (Daily Information) | The total hours entered for every day in the given time period. Navigate to different days in the period using the scroll bar at the bottom of the section. |
| Notes | View detailed information regarding the Time Sheet. Only Time Sheet Notes are shown here, as opposed to Notes for Work Allocations. |

7. Approve or Reject the Time Sheet.
    - To approve the Time Sheet, see *"Approving Time Sheets"* on page 66.
    - To reject the Time Sheet, see *"Rejecting Time Sheets"* on page 67.

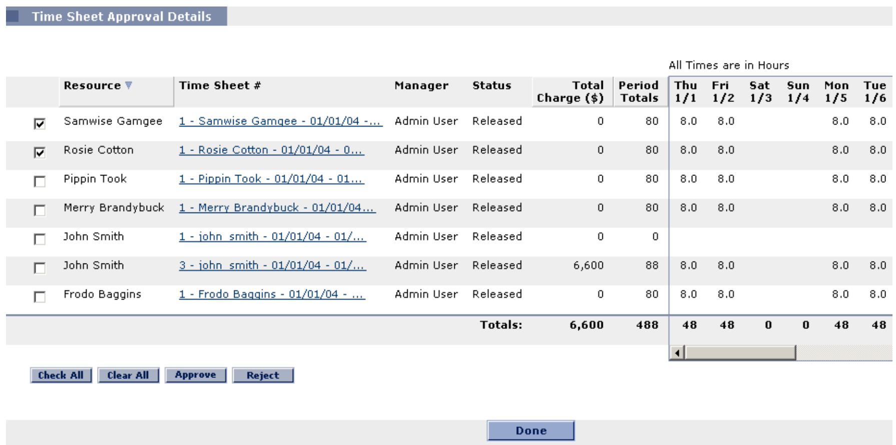
# Approving Time Sheets

Once a released Time Sheet is reviewed, it can be approved or rejected.

**To approve a Time Sheet:**

1. Logon to the Dashboard.
2. Search for and review the Time Sheet.

See *"Searching for Time Sheets to Approve"* on page 63 for details on how to search for and review a Time Sheet. The Time Sheet Approval Detail page opens.



Time Sheet Approval Details

All Times are in Hours

| | Resource | Time Sheet # | Manager | Status | Total Charge ($) | Period Totals | Thu 1/1 | Fri 1/2 | Sat 1/3 | Sun 1/4 | Mon 1/5 | Tue 1/6 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | Samwise Gamgee | 1 - Samwise Gamgee - 01/01/04 -... | Admin User | Released | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☑ | Rosie Cotton | 1 - Rosie Cotton - 01/01/04 - 0... | Admin User | Released | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Pippin Took | 1 - Pippin Took - 01/01/04 - 01... | Admin User | Released | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Merry Brandybuck | 1 - Merry Brandybuck - 01/01/04... | Admin User | Released | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | John Smith | 1 - john_smith - 01/01/04 - 01/... | Admin User | Released | 0 | 0 | | | | | | |
| ☐ | John Smith | 3 - john_smith - 01/01/04 - 01/... | Admin User | Released | 6,600 | 88 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Frodo Baggins | 1 - Frodo Baggins - 01/01/04 - ... | Admin User | Released | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| | | | | Totals: | 6,600 | 488 | 48 | 48 | 0 | 0 | 48 | 48 |

Check All | Clear All | Approve | Reject

Done

3. Select the Time Sheet checkbox.

   (Click **Check All** to select all the Time Sheets. )

4. Click **Approve** to approve the Time Sheet.

   The selected Time Sheets are approved.

5. Click **Done** to close the Time Sheet Approval Details page.

# Rejecting Time Sheets

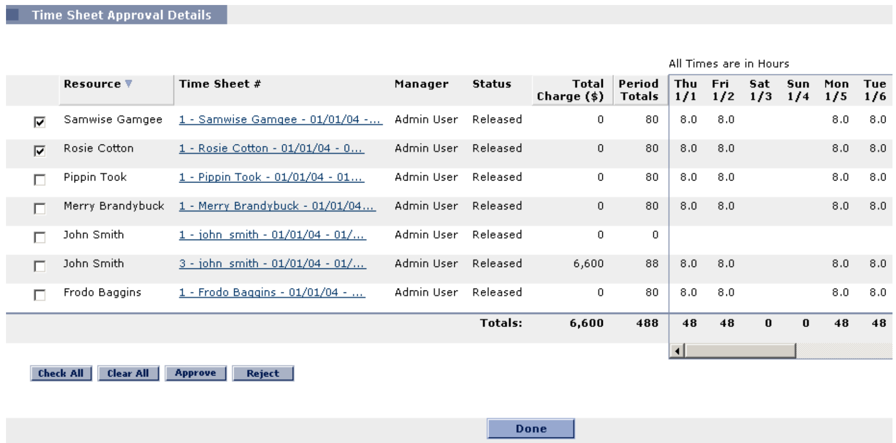
Once a released Time Sheet is reviewed, it can be approved or rejected.

**To reject a Time Sheet:**

1. Logon to the Dashboard.

2. Search for and review Time Sheets.

   See *"Searching for Time Sheets to Approve"* on page 63 for details on how to search for and review a Time Sheet. The Time Sheet Approval Detail page opens.




3. Click the Time Sheet Notes button.

   The Time Sheet Notes page opens.

4. In the text area, enter the reason the Time Sheet was rejected.

5. Click **Add**.

   The note is added to the Time Sheet.

6. Click Close Window.

   The Time Sheet Notes page closes.

7. Select the Time Sheet checkbox.

   (Click **Check All** to select all the Time Sheets. )

8. Click **Reject** to reject the Time Sheet.

   The selected Time Sheets are rejected.

9. Click **Done** to close the Time Sheet Approval Details page.

**Note**

When a Time Sheet is rejected, the Time Sheet is automatically routed back to the Resource for review and re-submission.

Chapter 8

# Freezing and Closing Time Sheets

This chapter details the procedures to freeze and close Time Sheets. After a Time Sheet is approved, it can still be updated by the original Resource and go through a re-approval cycle. This happens if the Resource submitted the Time Sheet prematurely and needs to include additional time. At some point, the Time Sheet needs to be frozen so that no additional changes can be made. Freezing a Time Sheet is required for billing processes and other similar actions.

This chapter covers the following topics:

- *Searching for Time Sheets to Close*
- *Freezing Time Sheets*
- *Closing Time Sheets*

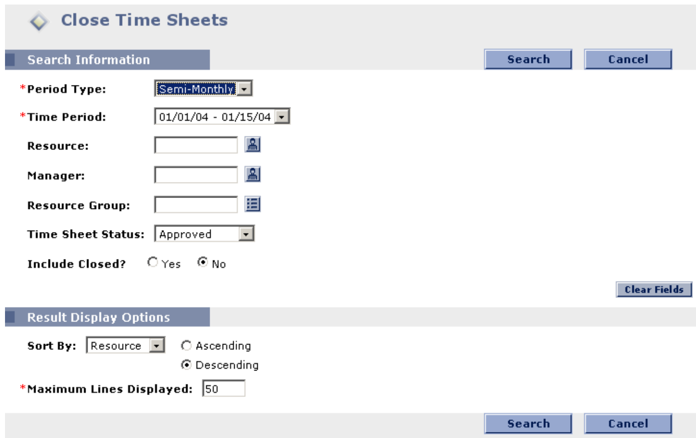
## Searching for Time Sheets to Close

This section details how to search for and review Time Sheets. Once a Time Sheet is approved, it must be frozen.

**To find a Time Sheet to freeze:**

1. Logon to the Dashboard.
2. From the Menu bar, select **Time > Time Sheets > Close Time Sheets**.

   The Close Time Sheets page opens.




3. Enter search criteria in the Search Information fields using the parameters listed in *Table 8-1*.

*Table 8-1. Close Time Sheet Search Information Parameters*

| Parameter | Description |
|---|---|
| Period Type | Search for Time Sheets of a specific period type. |
| Time Period | Search for Time Sheets of a specific time period. |
| Resource | Limit Time Sheets for a specific user. |
| MANAGER | Search for Time Sheets of a user with a specific manager. |
| RESOURCE GROUP | Search for Time Sheets of a particular Security Group with Time Management enabled. |
| Time Sheet Status | Search for Time Sheets of a specific status. To freeze or close a Time Sheet, the status must be Approved. |
| Include Closed? | Include Closed Time Sheets in the search. |

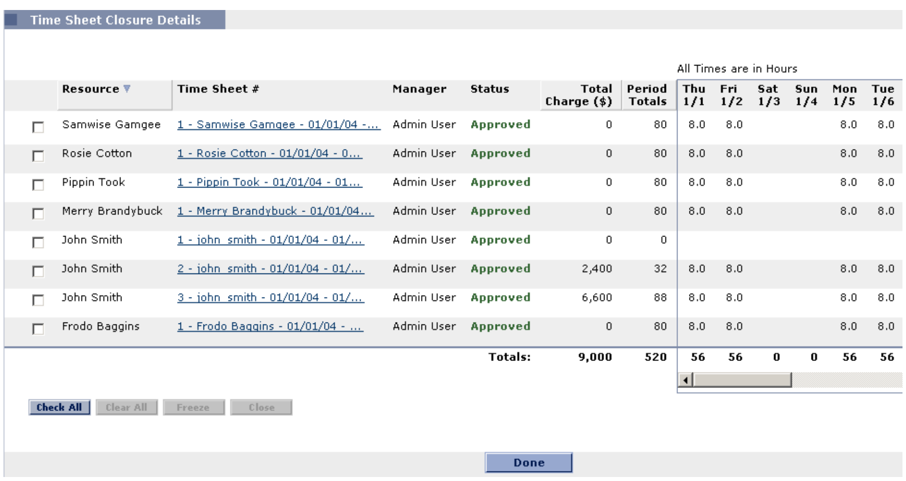
4. Enter display criteria in the Results Display Options fields using the parameters listed in *Table 8-2*.

*Table 8-2. Close Time Sheet Results Display Options Parameters*

| Parameter | Description |
|---|---|
| Sort By | The parameter to sort the returned items. The sort parameters are:<br>• Resource<br>• Total Hrs<br>• Total Cost |
| Ascending/ Descending | Display the results in Ascending or Descending order. |
| Maximum Lines Displayed | Set the maximum number of results to display in the Portlet. The default is 50. |

5. Click **Search** to start the search.

   The Time Sheets Closure Details page opens.




| Resource | Time Sheet # | Manager | Status | Total Charge ($) | Period Totals | Thu 1/1 | Fri 1/2 | Sat 1/3 | Sun 1/4 | Mon 1/5 | Tue 1/6 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Samwise Gamgee | 1 - Samwise Gamgee - 01/01/04 -... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| Rosie Cotton | 1 - Rosie Cotton - 01/01/04 - 0... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| Pippin Took | 1 - Pippin Took - 01/01/04 - 01... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| Merry Brandybuck | 1 - Merry Brandybuck - 01/01/04... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| John Smith | 1 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 0 | 0 | | | | | | |
| John Smith | 2 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 2,400 | 32 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| John Smith | 3 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 6,600 | 88 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| Frodo Baggins | 1 - Frodo Baggins - 01/01/04 - ... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| | | | **Totals:** | **9,000** | **520** | **56** | **56** | **0** | **0** | **56** | **56** |

Note

A search only locates Time Sheets the user has the authority to freeze or close.

Each row in the Time Sheet Closure Details section is a unique Time Sheet ready for freezing or closure. Note that there can be multiple Time Sheets per Resource for a given time period.

6. Review the Time Sheets.

   Time Sheets are reviewed using the parameters listed in *Table 8-3*.

*Table 8-3. Time Sheet Closure Details Fields*

| Field | Description |
|---|---|
| Resource | The Resource or User assigned to the Time Sheet. |
| Time Sheet # | A sequence number for the Time Sheet, the username and the time period of the Time Sheet. The sequence number is usually '1' unless there are multiple Time Sheets for the Resource for the same time period. Click the hyperlink to get a view-only picture of the Time Sheet details. |
| Manager | The Manager for the Resource as defined in the system. |
| Status | The current status of the Time Sheet, usually Approved. Any Time Sheets in the Open state are not be shown. |
| Total Charge ($) | A field which adds up all time entered on the Time Sheet multiplied by the adjusted hourly rates (based on source rates, defined discounts, and any override rate rules). |
| Period Totals | The total hours entered on the Time Sheet. |
| All Times are in Hours (Daily Information) | The total hours entered for every day in the given time period. Navigate to different days in the period using the scroll bar at the bottom of the section. |
| Notes | View detailed information regarding the Time Sheet and the individual lines on the Time Sheet. Only Time Sheet Notes are shown here, as opposed to Notes for Work Allocations. |

7. Freeze or Close the Time Sheet.

   - To freeze the Time Sheet, see *“Freezing Time Sheets”* on page 72.
   - To close the Time Sheet, see *“Closing Time Sheets”* on page 73.

# Freezing Time Sheets

Once a Time Sheet is approved, it can be frozen or closed.

**To freeze a Time Sheet:**

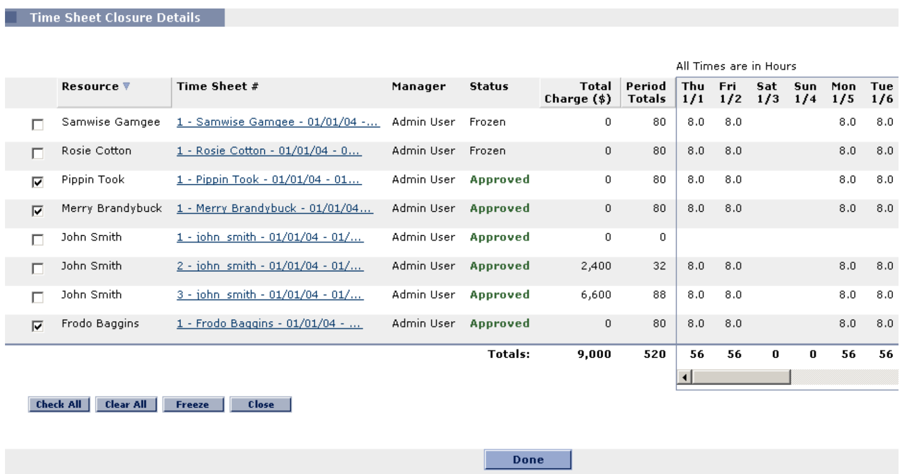
1. Logon to the Dashboard.

2. Search for and review a Time Sheet.

   See *"Searching for Time Sheets to Close"* on page 69 for details on how to search for and review Time Sheets. The Time Sheet Closure Details page opens.

3. Select the Time Sheet checkbox.

   (Click **Check All** to select all the Time Sheets. )


Time Sheet Closure Details

All Times are in Hours

| | Resource | Time Sheet # | Manager | Status | Total Charge ($) | Period Totals | Thu 1/1 | Fri 1/2 | Sat 1/3 | Sun 1/4 | Mon 1/5 | Tue 1/6 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | Samwise Gamgee | 1 - Samwise Gamgee - 01/01/04 -... | Admin User | Frozen | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Rosie Cotton | 1 - Rosie Cotton - 01/01/04 - 0... | Admin User | Frozen | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☑ | Pippin Took | 1 - Pippin Took - 01/01/04 - 01... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☑ | Merry Brandybuck | 1 - Merry Brandybuck - 01/01/04... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | John Smith | 1 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 0 | 0 | | | | | | |
| ☐ | John Smith | 2 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 2,400 | 32 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | John Smith | 3 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 6,600 | 88 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☑ | Frodo Baggins | 1 - Frodo Baggins - 01/01/04 - ... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| | | | | **Totals:** | **9,000** | **520** | **56** | **56** | **0** | **0** | **56** | **56** |

Check All | Clear All | Freeze | Close

Done

4. Click **Freeze** to freeze the Time Sheet.

   The Time Sheet is frozen.

5. Click **Done** to close the Time Sheet Closure Details page.

# Closing Time Sheets

Once a Time Sheet is approved, it can be frozen or closed.

**To close a Time Sheet:**

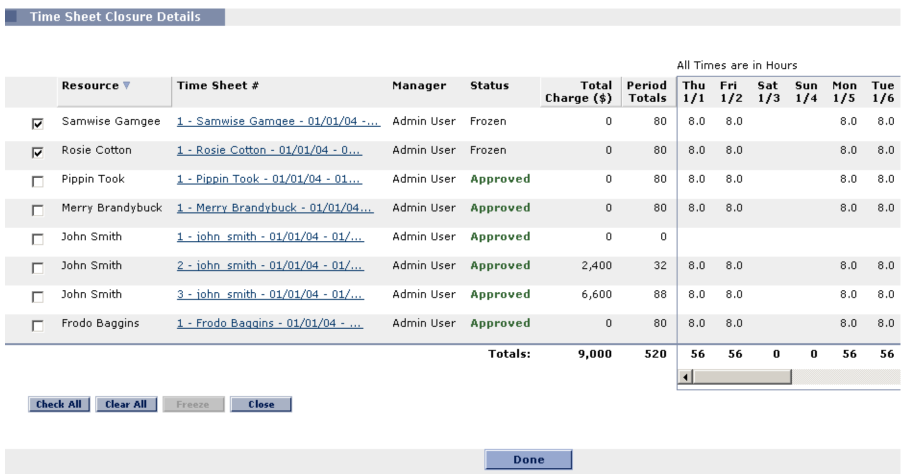
1. Logon to the Dashboard.

2. Search for and review a Time Sheet.

   See *"Searching for Time Sheets to Close"* on page 69 for details on how to search for and review Time Sheets. The Time Sheet Closure Details page opens.

3. Select the Time Sheet checkbox.

   (Click **Check All** to select all of the Time Sheets. )


Time Sheet Closure Details

All Times are in Hours

| | Resource | Time Sheet # | Manager | Status | Total Charge ($) | Period Totals | Thu 1/1 | Fri 1/2 | Sat 1/3 | Sun 1/4 | Mon 1/5 | Tue 1/6 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | Samwise Gamgee | 1 - Samwise Gamgee - 01/01/04 -... | Admin User | Frozen | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☑ | Rosie Cotton | 1 - Rosie Cotton - 01/01/04 - 0... | Admin User | Frozen | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Pippin Took | 1 - Pippin Took - 01/01/04 - 01... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Merry Brandybuck | 1 - Merry Brandybuck - 01/01/04... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | John Smith | 1 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 0 | 0 | | | | | | |
| ☐ | John Smith | 2 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 2,400 | 32 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | John Smith | 3 - john_smith - 01/01/04 - 01/... | Admin User | Approved | 6,600 | 88 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| ☐ | Frodo Baggins | 1 - Frodo Baggins - 01/01/04 - ... | Admin User | Approved | 0 | 80 | 8.0 | 8.0 | | | 8.0 | 8.0 |
| | | | | Totals: | 9,000 | 520 | 56 | 56 | 0 | 0 | 56 | 56 |

Check All | Clear All | Freeze | Close

Done

4. Click **Close** to close the Time Sheet.

   The Time Sheet is closed.

5. Click **Done** to close the Time Sheet Closure Details page.

# Chapter 9
# Time Management Portlets

This chapter details the Time Management Portlets. The Time Management Portlets are role-based visual displays providing relevant summary information concerning Time Management data.

This chapter covers the following topics:



## The Dashboard and Time Management Portlets

Time Management provides information in real-time through the Dashboard. A Dashboard can be personalized with Time Management-specific Portlets to see actions needed to take as well as actual versus budgeted time information.

These Portlets can be filtered to see time information for specific Resources or Work Items and can aggregate information in a variety of combinations. Drill down from these Portlets to find specific Work Allocations and Time Sheets.

Time Management Portlets are available with a Time Management license and a Dashboard license. *Figure 9-1* illustrates the Time Management Dashboard page. *Table 9-1* lists and describes Time Management Portlets.

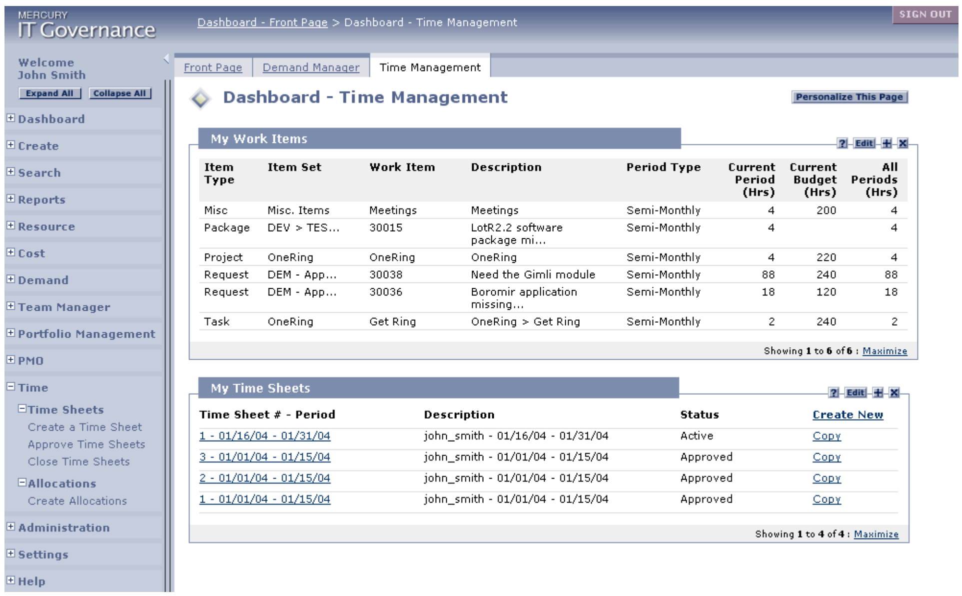



*Figure 9-1 Time Management Dashboard page*

*Table 9-1. Time Management Portlets*

| Portlet | Description |
|---|---|
| My Time Sheets | Lists all the Time Sheets (except cancelled Time Sheets) for the owner of the Dashboard. This Portlet is similar to the My Requests and My Packages Portlets but does not have parameters. |
| My Work Items | Lists all the Work Items on open Time Sheets for the owner of the Dashboard. This Portlet gives a quick snapshot of what has been worked on and where time is charged. This Portlet is similar to the My Requests and My Packages Portlets but does not have parameters. |
| TMG - Actuals for Direct Reports | Shows a Manager the time charged by their direct reports, allowing the manager to see what their team has been working on. |

*Table 9-1. Time Management Portlets [continued]*

| Portlet | Description |
|---|---|
| TMG - Resource Group Total by Work Item | Shows the time charged by the selected Resource Groups. This Portlet summarizes the totals of all the Resources in those Resource Groups, but segments this information by specific Work Item. |
| TMG - Resource Group Totals | Shows the time charged by the selected Resource Groups. This Portlet summarizes the totals of all the Resources in those Resource Groups, and sees the level of activity (by time) in the current and previous periods for these Resource Groups. |
| TMG - Resource Totals | Shows the time charged by the selected Resources, showing the level of activity (by time) in the current and previous period for these users. |
| TMG - Total Hrs by Work Item | Provides detailed information on the time allocated to, and the time charged for, specific Work Items, such as Requests, Projects, Tasks or Packages. |
| TMG - Work Allocation Details | Provides summary information on the Work Allocations defined in the system. This Portlet lists which Work Allocations are close to being used up or actually are over budget. |
| TMG - Work Item Set Budgets and Actuals | Lists summary information at the Work Item Set level, such as a Request Type, Master Project or Package Workflow. This Portlet is useful for getting a snapshot of which Projects or types of activities are spending the most time, as well as which Projects or types of activities have the most time budgeted. |

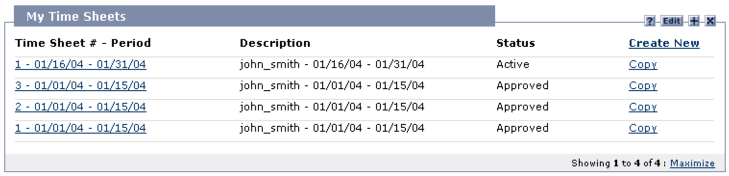
# My Time Sheets Portlet

The My Time Sheets Portlet lists all the open Time Sheets for the owner of the Dashboard, and can list frozen or closed Time Sheets. The owner of the Dashboard can create a new Time Sheet or copy an existing listed Time Sheet from the My Time Sheets Portlet. The My Time Sheets Portlet is similar to the My Requests and My Packages Portlets but does not have parameters.

This Portlet shows the following information:

- The Time Sheet number and Period the time was logged against.

- The name of the user and the Period the time was logged against.
- The status of the Time Sheet.



My Time Sheets

| Time Sheet # - Period | Description | Status | Create New |
|---|---|---|---|
| 1 - 01/16/04 - 01/31/04 | john_smith - 01/16/04 - 01/31/04 | Active | Copy |
| 3 - 01/01/04 - 01/15/04 | john_smith - 01/01/04 - 01/15/04 | Approved | Copy |
| 2 - 01/01/04 - 01/15/04 | john_smith - 01/01/04 - 01/15/04 | Approved | Copy |
| 1 - 01/01/04 - 01/15/04 | john_smith - 01/01/04 - 01/15/04 | Approved | Copy |

Showing 1 to 4 of 4 : Maximize

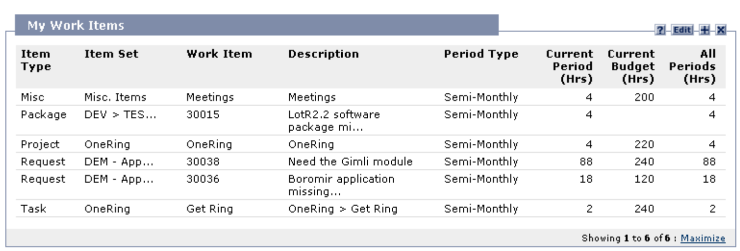
*Figure 9-2 My Time Sheets Portlet*

# My Work Items Portlet

The My Work Items Portlet lists all the Work Items on open Time Sheets for the owner of the Dashboard. The My Work Items Portlet is similar to the My Requests and My Packages Portlets but does not have any parameters.

This Portlet gives a quick snapshot of what the owner of the Dashboard has been working on and where time is currently being charged. This Portlet shows the following information:

- The Period Type.
- The total time charged to this Work Item.
- The time budgeted for the Work Item (if a Work Allocation exists).
- The time the owner of the Dashboard has charged to date.



My Work Items

| Item Type | Item Set | Work Item | Description | Period Type | Current Period (Hrs) | Current Budget (Hrs) | All Periods (Hrs) |
|---|---|---|---|---|---|---|---|
| Misc | Misc. Items | Meetings | Meetings | Semi-Monthly | 4 | 200 | 4 |
| Package | DEV > TES... | 30015 | LotR2.2 software package mi... | Semi-Monthly | 4 | | 4 |
| Project | OneRing | OneRing | OneRing | Semi-Monthly | 4 | 220 | 4 |
| Request | DEM - App... | 30038 | Need the Gimli module | Semi-Monthly | 88 | 240 | 88 |
| Request | DEM - App... | 30036 | Boromir application missing... | Semi-Monthly | 18 | 120 | 18 |
| Task | OneRing | Get Ring | OneRing > Get Ring | Semi-Monthly | 2 | 240 | 2 |

Showing 1 to 6 of 6 : Maximize

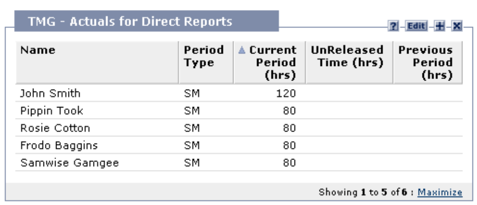
*Figure 9-3 My Work Items Portlet*

# TMG - Actuals for Direct Reports Portlet

The TMG - Actuals for Direct Reports Portlet shows the time charged by the Resources of a Manager. This Portlet gives visibility to Managers to see what their team has been working on. The TMG - Actuals for Direct Reports Portlet can be personalized by selecting the Manager(s).

This Portlet shows the following information:

- The names of the Resources of the selected Manager(s).
- The Period Type for each Resource under the Manager(s).
- The time charged by each Resource's Time Sheet in the current Time Period.
- The un-released Time Sheet totals for each Resource.
- The time charged by each Resource's Time Sheet in the previous Time Period.



TMG - Actuals for Direct Reports

| Name | Period Type | Current Period (hrs) | UnReleased Time (hrs) | Previous Period (hrs) |
|---|---|---|---|---|
| John Smith | SM | 120 | | |
| Pippin Took | SM | 80 | | |
| Rosie Cotton | SM | 80 | | |
| Frodo Baggins | SM | 80 | | |
| Samwise Gamgee | SM | 80 | | |

Showing 1 to 5 of 6 : Maximize

*Figure 9-4 TMG - Actuals for Direct Reports Portlet*

# TMG - Resource Group Total by Work Item Portlet

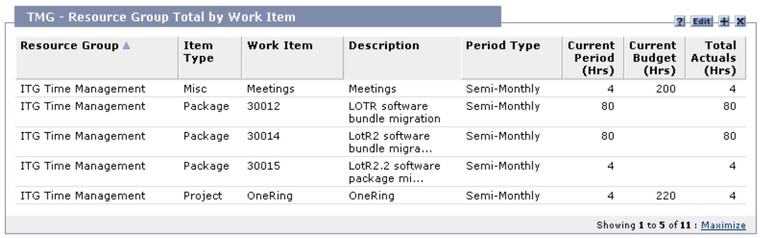
The TMG - Resource Group Total by Work Item Portlet shows the time charged by a Resource Group(s). This Portlet summarizes the totals of all the Resources in the selected Resource Group(s), but segments this information by Work Item.

This Portlet shows the following information:

- The total time entered by the Resources in the Resource Group for a Work Item.
- The current budget for the Work Item.
  This is the allocated budget for all Work Items the Resource Group(s) have on their Time Sheets for the *current and previous* time periods.

- The total actuals to date for the Work Item.
  This includes all items for the Resources in the Resource Group(s) in the *current and previous* time periods.

This Portlet is useful when looking at the work being done by a specific Resource Group. *Table 9-2* lists the parameters available when personalizing this Portlet.


TMG - Resource Group Total by Work Item

| Resource Group | Item Type | Work Item | Description | Period Type | Current Period (Hrs) | Current Budget (Hrs) | Total Actuals (Hrs) |
|---|---|---|---|---|---|---|---|
| ITG Time Management | Misc | Meetings | Meetings | Semi-Monthly | 4 | 200 | 4 |
| ITG Time Management | Package | 30012 | LOTR software bundle migration | Semi-Monthly | 80 | | 80 |
| ITG Time Management | Package | 30014 | LotR2 software bundle migra... | Semi-Monthly | 80 | | 80 |
| ITG Time Management | Package | 30015 | LotR2.2 software package mi... | Semi-Monthly | 4 | | 4 |
| ITG Time Management | Project | OneRing | OneRing | Semi-Monthly | 4 | 220 | 4 |

Showing 1 to 5 of 11 : Maximize

*Figure 9-5 TMG - Resource Group Total by Work Item Portlet*

*Table 9-2. TMG - Resource Group Total by Work Item Portlet Parameters*

| Parameter | Description |
|---|---|
| Resource Group | Displays the selected Resource Groups. |
| Work Item Type | Displays Work Items of a specific Work Item Type (Package, Request, Project or Task). |
| Work Item Set | Displays Work Items of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active. |
| Work Item | Displays a specific Work Item (Request, Project, Task or Package). The Work Item Set parameter must be filled in for this parameter to be active. |
| Actual/Budget Over | Displays Work Items where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see items that are over budget. |
| Current Time Over (Hrs) | Displays Work Items with time charged in the current period over a specific number of hours. Use this parameter to see the items with the most current activity. |
| Budget Over (Hrs) | Displays Work Items with Current Budgets over a specific number of hours. |

*Table 9-2. TMG - Resource Group Total by Work Item Portlet Parameters*

| | |
|---|---|
| Actuals to Date Over (Hrs) | Displays Work Items with Actuals to Date over a specific number of hours. |
| Period Type | Displays Work Items of the specified Period Type. |

# TMG - Resource Group Totals Portlet

The TMG - Resource Group Totals Portlet shows the time charged by Resource Groups. This Portlet summarizes the totals of all the Resources in those Resource Groups and sees the level of activity (by time) in the current and previous periods for these Resource Groups.

This Portlet shows the following information:

- The Resource Group(s).
- The total time entered by the Resources in the Resource Group(s) for the current and previous period.
- The current budget for the Work Items used by Resources in the Resource Group(s).
  This is the allocated budget for the *current and previous* time periods.
- The total actuals to date for the Work Items used by Resources in the Resource Group(s).
  This includes all items in the *current and previous* time periods.

*Table 9-3* lists the parameters available when personalizing this Portlet.

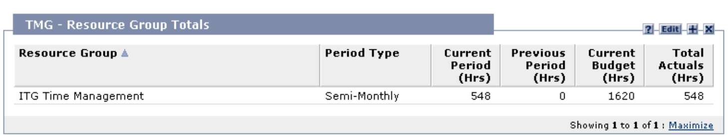



*Figure 9-6 TMG - Resource Group Totals Portlet*

*Table 9-3. TMG- Resource Group Totals Portlet Parameters*

| Parameter | Description |
|---|---|

*Table 9-3. TMG- Resource Group Totals Portlet Parameters [continued]*

| | |
|---|---|
| Resource Groups | Displays the specified Resource Group(s). |
| Period Type | Displays Resource Groups logging time against the specified Period Types. |

# TMG - Resource Totals Portlet

The TMG - Resource Totals Portlet shows the time charged by a set of Resources, sees the level of activity (by time) in the current and previous period for these Resources.

This Portlet shows the following information:

- The Resource name.
- The Period Type.
- The total time entered by the Resource in the current and previous period.
- The total budget for the Work Items used by the Resource.
  This is the allocated budget for the *current and previous* time periods.
- The total actuals to date for the Work Items used by the Resource.
  This includes all items in the *current and previous* time periods.

*Table 9-4* lists the parameters available when personalizing this Portlet.

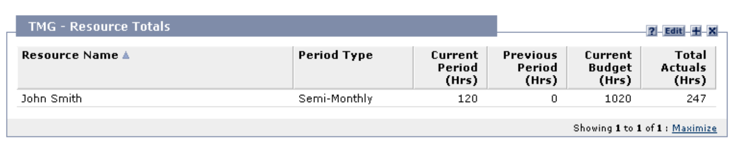



*Figure 9-7 TMG - Resource Totals Portlet*

*Table 9-4. TMG - Resource Total Portlet Parameters*

| Parameters | Description |
|---|---|
| Resource Groups | Displays the Resources of the selected Resource Group(s). This parameter is useful to show the time activity for a specific team of users. |
| Resource | Displays only the specified Resources. |

*Table 9-4. TMG - Resource Total Portlet Parameters [continued]*

| | |
|---|---|
| Period Type | Displays the Resources of those logging time against one or more Period Types. |

# TMG - Total Hrs by Work Item Portlet

The TMG - Total Hrs by Work Item Portlet gives detail information on the time allocated to and the time charged for specific Work Items (Requests, Projects, Tasks or Packages).

This Portlet shows the following information:

- The Work Item Type.
- The Item name.
- The Item description.
- The Period Type.
- The Current budget (if a Work Allocation exists).
  This is the allocated budget for the *current and previous* time periods.
- The total time charged to this Work Item in the current period by all users.
  This includes all items in the *current and previous* time periods.
- The total time charged to date for this item

This Portlet should not be used to display time information for all Work Items, but for a specific set of Work Items based on the type of Work Item, amount of time, or Actuals versus budget. *Table 9-5* lists the parameters available when personalizing this Portlet.

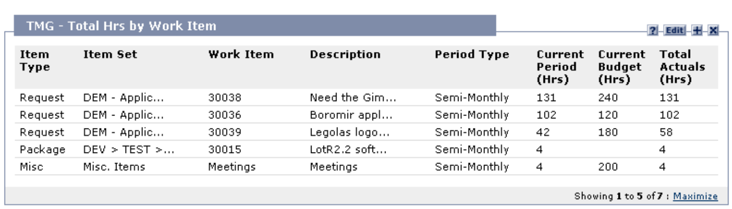



*Figure 9-8 TMG - Total Hours By Work Item Portlet*

*Table 9-5. TMG - Total Hours By Work Item Portlet Parameters*

| Parameters | Description |
|---|---|
| Resource | Display Work Items used on Time Sheets of one or more Resources. This parameter is useful to see the Work Items being worked on by a specific team of Resources. |
| Work Item Type | Displays Work Items of a specific Work Item Type (Package, Request, Project or Task). |
| Work Item Set | Displays Work Items of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active. |
| Work Item | Displays a specific Work Item (Request, Project, Task or Package). A maximum of one row is returned when this parameter is used. The Work Item Set parameter must be filled in for this parameter to be active. |
| Actual/Budget Over | Displays Work Items where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see items that are over budget. |
| Current Time Over (Hrs) | Displays Work Items with time charged in the current period over a specific number of hours. Use this parameter to see the items with the most current activity. |
| Budget Over (Hrs) | Displays Work Items with Current Budgets over a specific number of hours. |
| Actuals to Date Over (Hrs) | Displays Work Items with Actuals to Date over a specific number of hours. |
| Period Type | Displays Work Items of a specific Period Type. |

# TMG - Work Allocation Details Portlet

The TMG - Work Allocation Details Portlet lists summary information on the Work Allocations defined in the system. This Portlet sees which allocations are close to being used up or actually are over budget.

This Portlet shows the following information:

- The Work Item Type.
- The Work Item Set.
- The specific Work Item.
- The Work Item description for the Allocation.
- The current allocation budget.
- The total actuals against this Work Item.
- The real-time percentage of Actuals to budget.

A hyperlink on the Work Item Type navigates directly to the specific Work Allocation in the Work Allocation Details page. This Portlet does not show Closed Allocations. *Table 9-6* lists the parameters available when personalizing this Portlet.

TMG - Work Allocation Details

| Item Type | Item Set | Work Item | Description | Current Budget (Hrs) | Total Actuals (Hrs) | Actual / Budget % |
|---|---|---|---|---|---|---|
| Misc | Misc. I... | Meetings | Meetings | 200 | 4 | 2 |
| Project | OneRing | OneRing | OneRing | 220 | 4 | 2 |
| Request | DEM - A... | 30038 | Need the Gimli mo... | 240 | 131 | 55 |
| Request | DEM - A... | 30036 | Boromir applicati... | 120 | 102 | 85 |
| Request | DEM - A... | 30039 | Legolas logon too... | 180 | 58 | 32 |

Showing 1 to 5 of 6 : Maximize

*Figure 9-9 TMG - Work Allocation Details Portlet*

*Table 9-6. TMG - Work Allocation Details Portlet Parameters*

| Parameters | Description |
|---|---|
| Resource Group | Displays Work Allocations used by one or more of the selected Resource Groups. |
| Resource | Displays Work Allocations used by one or more of the selected Resources. |
| Work Item Type | Displays Work Allocations of a specific Work Item Type (Package, Request, Project or Task). |
| Work Item Set | Displays Work Allocations of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active. |

*Table 9-6. TMG - Work Allocation Details Portlet Parameters [continued]*

| | |
|---|---|
| Work Item | Displays Work Allocations of a specific Work Item (Request, Project, Task or Package). The maximum number of allocations returned is one when this parameter is used. The Work Item Set parameter must be filled in for this parameter to be active. |
| Actual/Budget Over | Displays Work Allocations where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see Allocations that are close to being fully used or are over budget. When this parameter is used, Allocations with 0 Current Budget are ignored. |
| Budget Over (Hrs) | Displays Work Allocations with Current Budgets over a specific number of hours. Use this parameter to see just the larger items. |

# TMG - Work Item Set Budgets and Actuals Portlet

The TMG - Work Item Set Budgets and Actuals Portlet lists summary information at the Work Item Set level (such as a Request Type, Master Project or Package Workflow.) A Work Item Set can be a Request Type, a Master Project, or a Package Workflow.

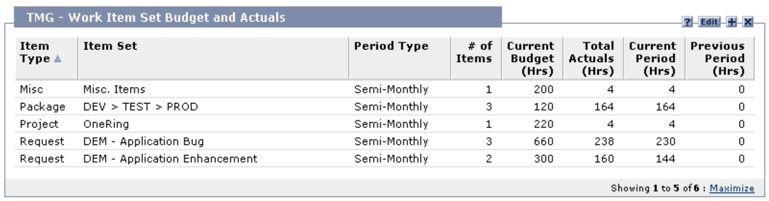
This Portlet is useful for getting a snapshot of which Projects or types of activities (such as Enhancement Requests or Bug Fixes) are spending the most time, as well as where most of the time is budgeted.

This Portlet shows the following information:

- All Work Item Sets meeting the selection criteria and that have time charged against them in the current period or the previous period.
- The Work Item Type.
- The Work Item Set.
- The Period Type.
- The Number of specific Work Items that are in the Work Item Set and have had time charged to them in the current or previous periods.
- The Total budget (from the Work Allocation) for those Work Items.

- The Total Actuals to Date for those Work Items.
  This lists only the Work Items included in the *current and previous* time periods.
- The time charged against those Work Items in the current period.
- The amount charged against those Work Items in the previous period.

*Table 9-7* lists the parameters available when personalizing this Portlet.


TMG - Work Item Set Budget and Actuals

| Item Type | Item Set | Period Type | # of Items | Current Budget (Hrs) | Total Actuals (Hrs) | Current Period (Hrs) | Previous Period (Hrs) |
|---|---|---|---|---|---|---|---|
| Misc | Misc. Items | Semi-Monthly | 1 | 200 | 4 | 4 | 0 |
| Package | DEV > TEST > PROD | Semi-Monthly | 3 | 120 | 164 | 164 | 0 |
| Project | OneRing | Semi-Monthly | 1 | 220 | 4 | 4 | 0 |
| Request | DEM - Application Bug | Semi-Monthly | 3 | 660 | 238 | 230 | 0 |
| Request | DEM - Application Enhancement | Semi-Monthly | 2 | 300 | 160 | 144 | 0 |

Showing 1 to 5 of 6 : Maximize

*Figure 9-10 TMG - Work Item Set Budgets and Actuals Portlet*

*Table 9-7. TMG - Work Item Set Budgets and Actuals Portlet Parameters*

| Parameters | Description |
|---|---|
| Work Item Type | Displays Work Item Sets of a specific Work Item Type (Package, Request, Project or Task). |
| Work Item Set | Displays Work Item Sets of a specific Work Item Set (Request Type, Master Project or Package Workflow). The maximum number of rows returned is one when this parameter is used. The Work Item Type parameter must be filled in for this parameter to be active. |
| Count Over | Displays Work Item Sets with more than the specific Work Items that have time charged against them in the current or previous period. Use this Portlet to filter for high volume Work Item Sets (in terms of individual items). |
| Budget Over (hrs) | Displays Work Item Sets with Work Items whose budget totals over the specified value. |
| Actuals Over (hrs) | Displays Work Item Sets with Work Items totaling Actuals to Date over the specified value. |
| Actual/Budget Over (%) | Displays Work Item Sets where the total Actuals to Date/Total Current Budget is over a given percentage. This restriction is for the total values and not the actuals to budget percentages of the individual items. |
| Period Type | Displays Work Item Sets of a specific Period Type. |

# Chapter 10
# Time Management Reports

This chapter details the Time Management reports. The Time Management reports create textual reports viewed through a Web browser.

This chapter covers the following topics:

- *Time Management Report Overview*
- *TMG - Actual Time/Cost Summary Report*
- *TMG - Actual Time Summary Report*
- *TMG - Time Sheet Details Report*
- *TMG - Time Sheet Summary Report*
- *TMG - Work Allocation Details*

## Time Management Report Overview

This section gives an overview of the Time Management reports. *Table 10-1* lists all of the standard reports available in Time Management. All of these reports create textual reports viewed through a Web browser.

*Table 10-1. Time Management Reports*

| Report | Description |
|---|---|
| TMG - Time Sheet Details Report | Reports on multiple Time Sheets at once and views their details. |
| TMG - Time Sheet Summary Report | Summarizes time information entered in non-cancelled Time Sheets. |

*Table 10-1. Time Management Reports [continued]*

| Report | Description |
|---|---|
| TMG - Actual Time Summary Report | Summarizes actual time information entered in non-cancelled Time Sheets. |
| TMG - Actual Time/Cost Summary Report | Summarizes actual time information entered in non-cancelled Time Sheets and displays the calculated charge dollar totals for each grouping. This report is usually restricted to a smaller group of users than the Actual Time Summary Report. |
| TMG - Work Allocation Details Parameters | Shows the budget and Actuals to date, Charge Code Allocations and Resource restrictions. |

# TMG - Actual Time/Cost Summary Report

The TMG - Actual Time/Cost Summary Report summarizes actual time information entered in non-cancelled Time Sheets and the calculated charge dollar totals for each grouping. Different parameters provide different views into the data, such as:

- The report displaying the total time entered per Resource.
- The report displaying the total time entered per Project.
- The report displaying the total time entered in each given time period.

This report is usually restricted to a smaller group of users than the Actual Time Summary Report. *Table 10-2* lists the parameters available when setting up this report.

**Report Parameters**

Report Name: TMG - Actual Time/Cost Summary
Run Date: January 14, 2004 01:38 PM
Group By: Work Item
Resource:
Resource Group:
Group Total Above X Hours:
Group Total Above X Dollars:
Include Unreleased Time Sheets: Y
Charge Code:

Starting Time Period: 01/01/04 - 01/15/04
Ending Time Period: 01/16/04 - 01/31/04
Work Item Type:
Work Item Set:
Work Item:
Activity:
Show Sub Totals: N

| Work Item | Actual Hours | Cost($) |
|---|---|---|
| 30012 | 80.0 | 0 |
| 30014 | 80.0 | 0 |
| 30015 | 4.0 | 300 |
| 30034 | 96.0 | 0 |
| 30035 | 11.0 | 0 |
| 30036 | 102.0 | 1,350 |
| 30038 | 131.0 | 6,600 |
| 30039 | 58.0 | 0 |
| Get Ring | 2.0 | 150 |
| Meetings | 4.0 | 300 |
| OneRing | 4.0 | 300 |
| Totals | 572.0 | 9,000 |

*Figure 10-1 TMG - Actual Time/Cost Summary Report*

*Table 10-2. TMG - Actual Time/Cost Summary Report Parameters*

| Fields | Description |
|---|---|
| Group By | Determines how to group the information, such as by Resource or Work Item Type. |
| Starting Time Period | Display information entered on or after a specific time period. |
| Ending Time Period | Display information entered on or before a specific time period. |
| Work Item Type | Display information for a specific Work Item Type. |
| Work Item Set | Display information for a specific set of Work Item Sets, such as Request Types, Master Projects, Packages or Workflows. |
| Work Item | Display information for a specific set of Work Items, such as Package, Request, Project or Task. |
| Activity | Display information on a specific activity. |

*Table 10-2. TMG - Actual Time/Cost Summary Report Parameters [continued]*

| | |
|---|---|
| Charge Code | Display information charged to a specific Charge Code. Use the Charge Code percentage to calculate the time against the Charge Code. |
| Resource | Display information for a specific set of Resources. |
| Resource Group | Display information for Resources in a specific set of Resource Groups. |
| Group Total Above X Hours | Display information where the total Actual hours are above the given number. This filters for the areas with large time charges. |
| Group Total Above X Dollars | Display information where the total Actual hours are above the given number. This filters for the areas with large time charges. |
| Include Unreleased Time Sheets | Display information where active Time Sheets are included or excluded. |
| Show Sub Totals | If set to Yes, the report shows time totals for the first column selected in the grouping. |

# TMG - Actual Time Summary Report

The TMG - Actual Time Summary Report summarizes actual time information entered in non-cancelled Time Sheets. Different parameters provide different views into the data, such as:

- The total time entered per Resource for each time period.
- The total time entered per Project.
- The total time entered in each given time period.

This report is similar to the Time Sheet Summary Report except it does not show Work Allocation budget information. This report is usually run on a larger group of users than the Actual Time/Cost Summary Report. *Table 10-3* lists the parameters available when setting up this report.

**Report Parameters**

Report Name: TMG - Actual Time Summary
Run Date: January 14, 2004 01:41 PM
Group By: Resource
Resource:
Resource Group:
Work Item Set:
Work Item:
Activity:
Show Sub Totals: N

Starting Time Period: 01/01/04 - 01/15/04
Ending Time Period: 01/16/04 - 01/31/04
Work Item Type:
Group Total Above X Hours:
Include Unreleased Time Sheets: Y
Charge Code:

| Resource | Actual Hours |
|---|---|
| Frodo Baggins | 80.0 |
| John Smith | 172.0 |
| Merry Brandybuck | 80.0 |
| Pippin Took | 80.0 |
| Rosie Cotton | 80.0 |
| Samwise Gamgee | 80.0 |
| Totals | 572.0 |

*Figure 10-2 TMG - Actual Time Summary Report*

*Table 10-3. TMG - Actual Time Summary Report Parameters*

| Fields | Description |
|---|---|
| Group By | Determines how to group the information, such as by Resource or Work Item Type. |
| Starting Time Period | Display information entered on or after a specific time period. |
| Ending Time Period | Display information entered on or before a specific time period. |
| Work Item Type | Display information for a specific Work Item Type. |
| Work Item Set | Display information for a specific set of Work Item Sets, such as Request Types, Master Projects, Packages or Workflows. |
| Work Item | Display information for a specific set of Work Items, such as Package, Request, Project or Task. |
| Activity | Display information on a specific activity. |
| Charge Code | Display information charged to a specific Charge Code. Use the Charge Code percentage to calculate the time against the Charge Code. |
| Resource | Display information for a specific set of Resources. |

*Table 10-3. TMG - Actual Time Summary Report Parameters [continued]*

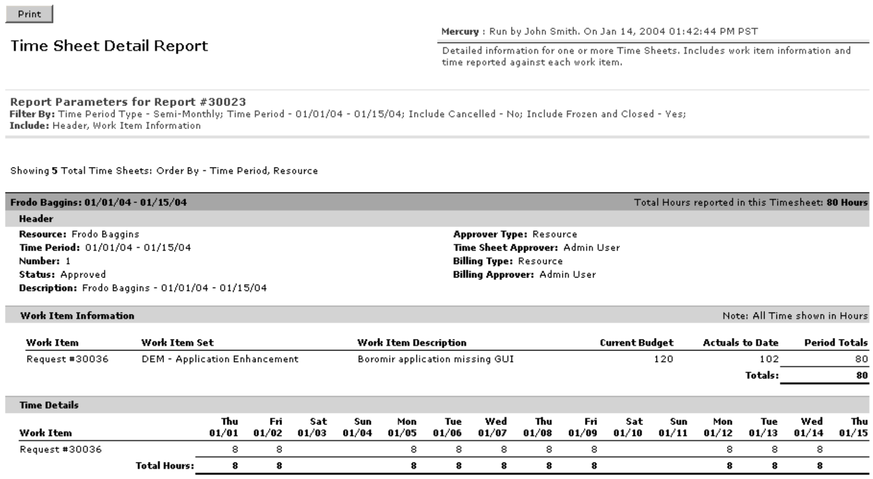
| | |
|---|---|
| Resource Group | Display information for Resources in a specific set of Resource Groups. |
| Group Total Above X Hours | Display information where the total Actual hours are above the given number. This filters for the areas with large time charges. |
| Include Unreleased Time Sheets | Display information where active Time Sheets are included or excluded. |
| Show Sub Totals | If set to Yes, the report shows time totals for the first column selected in the grouping. |

# TMG - Time Sheet Details Report

The TMG - Time Sheet Details Report reports on multiple Time Sheets at once and views their details. The report displays the following information:

- Header information
- Daily time information
- Line information, such as:
  - Work Item
  - Actuals to date
  - Charge Code
  - Activity information
  - Notes details

*Table 10-4* lists the parameters available when setting up this report.



Print

Time Sheet Detail Report

**Mercury** : Run by John Smith. On Jan 14, 2004 01:42:44 PM PST

Detailed information for one or more Time Sheets. Includes work item information and time reported against each work item.

**Report Parameters for Report #30023**
**Filter By:** Time Period Type - Semi-Monthly; Time Period - 01/01/04 - 01/15/04; Include Cancelled - No; Include Frozen and Closed - Yes;
**Include:** Header, Work Item Information

Showing **5** Total Time Sheets: Order By - Time Period, Resource

**Frodo Baggins: 01/01/04 - 01/15/04** Total Hours reported in this Timesheet: **80 Hours**

**Header**

**Resource:** Frodo Baggins
**Time Period:** 01/01/04 - 01/15/04
**Number:** 1
**Status:** Approved
**Description:** Frodo Baggins - 01/01/04 - 01/15/04

**Approver Type:** Resource
**Time Sheet Approver:** Admin User
**Billing Type:** Resource
**Billing Approver:** Admin User

**Work Item Information** Note: All Time shown in Hours

| Work Item | Work Item Set | Work Item Description | Current Budget | Actuals to Date | Period Totals |
|---|---|---|---|---|---|
| Request #30036 | DEM - Application Enhancement | Boromir application missing GUI | 120 | 102 | 80 |
| | | | | Totals: | 80 |

**Time Details**

| Work Item | Thu 01/01 | Fri 01/02 | Sat 01/03 | Sun 01/04 | Mon 01/05 | Tue 01/06 | Wed 01/07 | Thu 01/08 | Fri 01/09 | Sat 01/10 | Sun 01/11 | Mon 01/12 | Tue 01/13 | Wed 01/14 | Thu 01/15 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Request #30036 | 8 | 8 | | | 8 | 8 | 8 | 8 | 8 | | | 8 | 8 | 8 | |
| Total Hours: | 8 | 8 | | | 8 | 8 | 8 | 8 | 8 | | | 8 | 8 | 8 | |

*Figure 10-3 TMG - Time Sheet Details Report*

*Table 10-4. TMG - Time Sheet Details Report Parameters*

| Fields | Description |
|---|---|
| Period Type | Displays the Time Sheets of the specified time period type. Period Types include Weekly, Bi-Weekly, Semi-Monthly and Monthly. |
| Time Period | Displays the Time Sheets for a specific set of time periods. |
| Resource | Displays the Time Sheets for a specific set of Resources. |
| Resource Group | Displays the Time Sheets for the Resources of a Resource Group(s). |
| Time Sheet # | Displays the Time Sheets with a specific Time Sheet number. A unique sequence number is assigned when there are multiple Time Sheets for a Resource in the same time period. |
| Time Sheet Status | Displays the Time Sheets currently at a specific status. |
| Order By | Determines how to order the list of Time Sheets if the parameters result in more than one Time Sheet. |
| Include Closed Time Sheets | Closed Time Sheets are excluded unless this parameter is set to Yes. |
| Include Cancelled Time Sheets | Cancelled Time Sheets are excluded unless this parameter is set to Yes. |

*Table 10-4. TMG - Time Sheet Details Report Parameters [continued]*

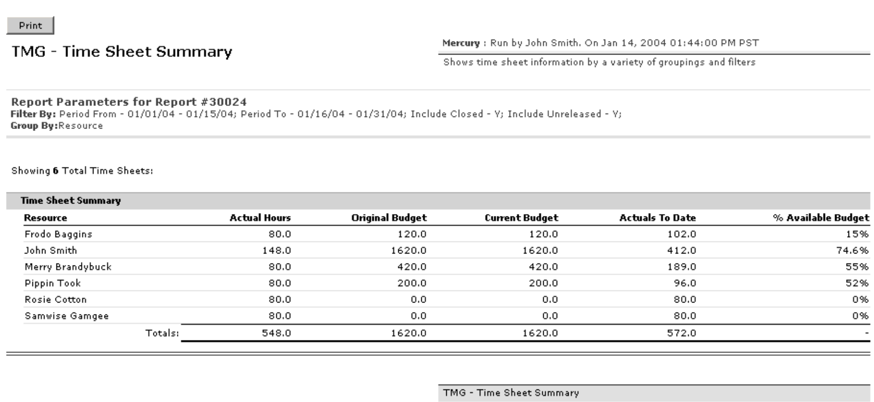
| | |
|---|---|
| Show Time Sheet Notes | Shows the Header Notes of the queried Time Sheets. |
| Show Line Notes | Shows the detailed Notes attached to each Time Sheet line. |
| Show Activity Details | Shows the detailed time entered for the Time Sheet line by each activity. |
| Show Charge Codes | Shows the Charge Code Allocations for each Time Sheet line. |

# TMG - Time Sheet Summary Report

The TMG - Time Sheet Summary Report summarizes time information entered in non-cancelled Time Sheets. Different parameters provide different views into the data, such as:

- The total time entered per Resource for time period.
- The total time entered per Project versus the budget for that Project.
- The total time entered in each give time period.

This report is similar to the Actual Time Summary report except that this report shows Work Allocation budget information. *Table 10-5* lists the parameters available when setting up this report.


Print

TMG - Time Sheet Summary

**Mercury** : Run by John Smith. On Jan 14, 2004 01:44:00 PM PST

Shows time sheet information by a variety of groupings and filters

**Report Parameters for Report #30024**
**Filter By:** Period From - 01/01/04 - 01/15/04; Period To - 01/16/04 - 01/31/04; Include Closed - Y; Include Unreleased - Y;
**Group By:**Resource

Showing **6** Total Time Sheets:

**Time Sheet Summary**

| Resource | Actual Hours | Original Budget | Current Budget | Actuals To Date | % Available Budget |
|---|---|---|---|---|---|
| Frodo Baggins | 80.0 | 120.0 | 120.0 | 102.0 | 15% |
| John Smith | 148.0 | 1620.0 | 1620.0 | 412.0 | 74.6% |
| Merry Brandybuck | 80.0 | 420.0 | 420.0 | 189.0 | 55% |
| Pippin Took | 80.0 | 200.0 | 200.0 | 96.0 | 52% |
| Rosie Cotton | 80.0 | 0.0 | 0.0 | 80.0 | 0% |
| Samwise Gamgee | 80.0 | 0.0 | 0.0 | 80.0 | 0% |
| Totals: | 548.0 | 1620.0 | 1620.0 | 572.0 | - |

TMG - Time Sheet Summary

*Figure 10-4 TMG - Time Sheet Summary Report*

*Table 10-5. TMG - Time Sheet Summary Report Parameters*

| Fields | Description |
|---|---|
| Group By | Determines how to group the information, such as by Resource or Work Item Type. |
| Starting Time Period | Display Time Sheets entered on or after a specific time period. |
| Ending Time Period | Display Time Sheets entered on or before a specific time period. |
| Current Last X Periods | Displays Time Sheets in the current period and a given number of previous periods. If 0 is entered, the report only shows Time Sheets in the current time period. |
| Work Item Type | Displays Time Sheets containing the specified Work Item Type. |
| Work Item Set | Displays Time Sheets containing the specified Work Item Sets, such as Request Types, Master Projects or Package Workflows. |
| Work Item | Displays Time Sheets for a given set of Work Items (Package, Request, Project or Task). |
| Activity | Displays Time Sheets entered against a specific activity. |
| Charge Code | Displays Time Sheets with time charged to a specific Charge Code. Use the Charge Code percentage to calculate the time against the Charge Code. |
| Resource | Displays Time Sheets for a specific set of Resources. |
| Resource Group | Displays Time Sheets for a specific Resource Group(s). |
| Time Sheet # | Only show Time Sheets of a specific number. A unique sequence number is assigned when there are multiple Time Sheets for a Resource in the same time period. |
| Include Closed Time Sheets | Closed Time Sheets are excluded unless this parameter is set to Yes. |
| Include Unreleased Time Sheets | Active Time Sheets are excluded unless this parameter is set to Yes. |

# TMG - Work Allocation Details

The TMG - Work Allocation Details Report shows much of the same information shown on the Work Allocation definition page. This includes the:

- Allocation Work Item information
- budget and Actuals to date
- Charge Code Allocations
- Resource restrictions.

This report also returns hyperlinks allowing modification of the Work Allocation ("Edit Work Allocations" Access Grant required). *Table 10-6* lists the parameters available when setting up this report.

**Report Parameters**

Report Name: TMG - Work Allocation Details
Run Date: January 14, 2004 01:45 PM
Work Item Type: Work Item Set:
Work Item: Charge Code:
Creation Date From: 2004-01-01 00:00:00 Creation Date To: 2004-01-13 00:00:00
Actuals/Budget Over X%: Include Closed: N
Show Resource Restrictions: N Show Detailed Actuals: N
Show Discounts: N Sort By: Work Item Type

***** Allocation Details *****

| Alloc URL | Work Item Type | Work Item Set | Work Item | Description | Orig Bdgted Time (Hrs) | Curr Bdgted Time (Hrs) | Actuals To Date | Revised Flag | Actuals to Budget (%) | Charge Codes | Resources Restricted |
|---|---|---|---|---|---|---|---|---|---|---|---|
| U | Misc | Misc. Items | Vacation | Vacation | 0.0 | 0.0 | 0.0 | | 0 | | N |
| U | Package | DEV > TEST > PROD | 30017 | New LotR2.2 software bundle migration | 120.0 | 120.0 | 0.0 | | 0 | | N |
| U | Project | OneRing | OneRing | OneRing | 220.0 | 220.0 | 4.0 | | 2 | | N |
| U | Request | DEM - Application Bug | 30034 | Aragorn application missing logon window. | 200.0 | 200.0 | 96.0 | | 48 | | N |
| U | Request | DEM - Application Bug | 30035 | Need Elrond module | 220.0 | 220.0 | 11.0 | | 5 | | N |
| U | Request | DEM - Application Bug | 30038 | Need the Gimli module | 240.0 | 240.0 | 131.0 | | 55 | | N |
| U | Request | DEM - Application Enhancement | 30036 | Boromir application missing GUI | 120.0 | 120.0 | 102.0 | | 85 | | N |
| U | Request | DEM - Application Enhancement | 30039 | Legolas logon too slow | 180.0 | 180.0 | 58.0 | | 32 | | N |
| U | Task | OneRing | Get Ring | OneRing > Get Ring | 240.0 | 240.0 | 2.0 | | 1 | | N |

*Figure 10-5 TMG - Work Allocation Details Report Parameters page*

*Table 10-6. TMG - Work Allocation Details Report Parameters*

| Fields | Description |
|---|---|
| Work Item Type | Displays Work Allocations for a given Work Item Type. |
| Work Item Set | Displays Work Allocations for a specific Work Item Set (such as a specific Request Type, Master Project or Package Workflow). |
| Work Item | Displays Work Allocations for a specific Work Item. |

*Table 10-6. TMG - Work Allocation Details Report Parameters [continued]*

| | |
|---|---|
| Charge Code | Displays Work Allocations with a specific Charge Code. This displays all the time being charged to a specific department or cost center. |
| Creation Date From | Displays Work Allocations created on or after a specific date. |
| Creation Date To | Displays Work Allocations created on or before a specific date. |
| Actuals/Budget Over X% | Displays Work Allocations where the Actuals to date are over a certain percentage of the current budget. This parameter reports on the allocations close to or over budget. |
| Include Closed | Closed allocations are excluded unless this parameter is set to Yes. |
| Show Resource Restrictions | For each Work Allocation, show the restricted Resources and Resource Groups. |
| Show Detailed Actuals | Displays the total Actuals to date for the Work Allocation, as well as the breakdown of the Actuals entered by each Resource. |
| Show Discounts | Displays the standard and billing discount numbers. |
| Sort By | Sort the report by the:<br>• Work Item Type<br>• Work Item Set<br>• Work Item Name<br>• Original Budget<br>• Current Budget. |

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