



Mercury IT Governance Center™
Mercury Time Management™
Configuration Guide

Version: 6.0



MERCURY™

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Chapter 1 Introduction

In This Chapter:

- *About This Document*
 - *Who Should Read This Document*
 - *Prerequisite Documents*
 - *Related Documents*
 - *Overview of Configuring Time Management*
 - *Entering Work Allocations*
 - *Entering Time Sheet Information*
 - *Approving Time Sheets*
 - *Freezing Time Sheets*
 - *Billing or Charging with Third-Party Applications*
 - *Closing Time Sheets*
 - *Accessing Mercury IT Governance Center*
-

About This Document

Mercury Time Management™ is a Mercury IT Governance Center™ product that budgets time against bodies of work within the Mercury IT Governance Center. Time Management integrates information from requests, packages, tasks, and projects, and quickly determines if estimated time and costs associated with these entities relate to the actual time and costs. Actual time spent is entered on time sheets, which are reviewed, approved, frozen, and closed.

This document contains the following chapters:

- [Chapter 1, *Introduction*, on page 11](#)

This chapter provides an overview of this document and of the Mercury Time Management process.

- [Chapter 2, *Configuring Time Management Periods*, on page 19](#)

This chapter details how to configure Mercury Time Management period types and time periods. Period types specify the different types of intervals for which time sheets record information.

- [Chapter 3, *Configuring Time Sheet Policies*, on page 25](#)

This chapter details how to configure time sheet policies. Time sheet policies are rules designed to oversee the creation of time sheets. Time sheet policies are written for groups of resources, not for individual users.

- [Chapter 4, *Maintaining Resources*, on page 41](#)

This chapter details how to configure a resource for Time Management. A resource is an individual user who performs work and can log time against that work. Resources are assigned to specific work items and have attributes, such as manager, and have a cost rate.

- [Chapter 5, *Maintaining Activities*, on page 49](#)

This chapter details how to configure an activity. An activity is a categorization of the type of work performed against a work item, such as design work or documentation. Activities can also be used to classify the work as depreciable for financial accounting.

- [Chapter 6, *Maintaining Charge Codes*, on page 55](#)

This chapter details procedures to configure and maintain charge codes. Charge codes are entities used as links between work items and charge accounts.

- [Chapter 7, *Maintaining Override Rules*, on page 61](#)

This chapter details procedures to configure override rules. Override rules are designed to override default cost rates and other attributes. To initiate an override rule, the attributes of a time sheet line or the attributes of the user, must equal an override rule's dependencies.

- [Chapter 8, *Creating and Maintaining Time Management Filters*, on page 75](#)

This chapter details how to configure Mercury Time Management filters. The Time Management filters limit the work item auto-complete list on work allocations or time sheets.

- [Chapter 9, *Maintaining Time Management Validations*, on page 89](#)

This chapter details how to configure Mercury Time Management validations. Validations determine the acceptable input values for fields, such as the acceptable work items to include on a time sheet.

- [Chapter 10, *Integrating Mercury Time Management with Mercury Project Management*, on page 95](#)

This chapter details how to integrate Mercury Time Management and Mercury Project Management™. Integrating Time Management and Project Management allows actual time (and associated costs) entered on time sheets to automatically update actual effort and actual costs of projects.

Who Should Read This Document

This document is for the following audience types:

- Application administrators
- Application developers/configurators

For More Information

For information about audience types, see the *Guide to Documentation*.

Prerequisite Documents

Prerequisite documents for this guide are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*

For More Information

For information about these documents and how to access them, see the *Guide to Documentation*.

Related Documents

Related documents for this guide are:

- *Mercury Time Management User's Guide*
- *Mercury Demand Management: Configuring a Request Resolution System*
- *Mercury Project Management User's Guide*
- *Mercury Financial Management User's Guide*
- *Commands, Tokens, and Validations Guide and Reference*
- *Security Model Guide and Reference*

For More Information

For information about these documents and how to access them, see the *Guide to Documentation*.

Overview of Configuring Time Management

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

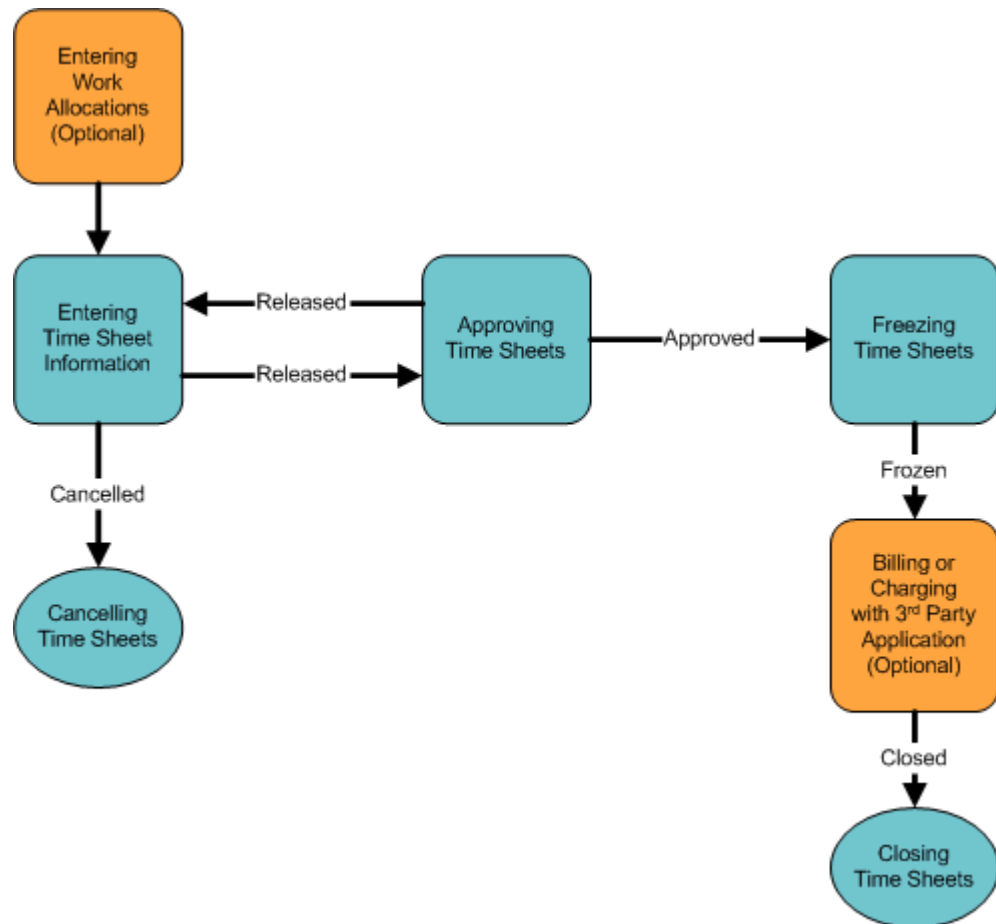


Figure 1-1. Time Management process overview

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.

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.

Canceling 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.

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. 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.

Billing or Charging with Third-Party Applications

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.

Accessing Mercury IT Governance Center

Businesses often need to control access to certain information and business processes. This can be done to protect sensitive information, such as employee salaries or to simplify business processes by hiding data that is irrelevant to the user. Mercury IT Governance Center includes a set of features to help control data and process security on the following levels:

- Limiting who can access certain windows or pages
- Limiting who can view or edit certain fields
- Limiting the data displayed in sensitive fields or screens
- Limiting which users can view, create, edit, or process Mercury IT Governance Center entities, such as requests, packages, projects, portfolios, and programs
- Limiting which users can view, create, or edit Mercury IT Governance Center configuration entities, such as workflows, request types, object types, and security groups
- Limiting which users can alter the security settings

The following features control the data and process security in Mercury IT Governance Center. These features can be combined in a number of ways to provide a secure system:

- **Licenses.** Each user is assigned a license that provides the user with the potential to access to a set of Mercury IT Governance Center product-related screens and functions. Licenses dictate available behavior but need to be used in conjunction with access grants to enable specific fields and functions.
- **Access Grants.** Linked to users through security groups, access grants define which windows and functions users can view, edit, or perform actions in. Access grants also provide varying levels of control over certain entities and fields.
- **Entity-level restrictions.** Settings on the entity that specify who can create, edit, process, and delete Mercury IT Governance Center entities, such as requests, packages, and projects. You can also control which request types and object types can be used with certain workflows. These restrictions are often configured in the configuration entities, such as workflows, request types, and object types.

- **Field-level restrictions.** For each custom field that you define in Mercury IT Governance Center, you can configure when it is visible or editable. For some fields, you can additionally specify which users can view or edit the field.
- **Configuration-level restrictions.** You can specify, using ownership groups settings, which users can modify configuration entities in the system. For example, you can control who is allowed to edit an existing workflow. This allows you to guarantee that only appropriate users are altering your Mercury IT Governance Center-controlled processes.

For More Information

For more information concerning accessing the Mercury IT Governance Center as well as information on security groups and access grants, see the *Security Model Guide and Reference*.

Chapter

2

Configuring Time Management Periods

In This Chapter:

- *Overview of Time Management Periods*
 - *Selecting Period Types*
 - *Creating Time Periods*
-

Overview of Time Management Periods

This section details how to configure Mercury Time Management period types and time periods. Period types specify the different types of intervals for which time sheets record information, including:

- Weekly
- Bi-Weekly
- Semi-Monthly
- Monthly

A time period (period) is the actual dates of a period type. For example, a semi-monthly period would be 05/01/02 – 05/15/02.

Selecting Period Types

A period type is the duration of the time period used by Time Management, such as weekly or monthly. One or more period types can be enabled. Selecting the period types makes those period types available to Time Management.

Selecting period types requires knowledge of SQL and DBA privileges. See your application administrator concerning the selection of period types. The supported period types are listed in [Table 2-1](#). Eligible values are case sensitive.

Table 2-1. Period types and eligible values

Period Type	Eligible Value
Weekly	WEEKLY
Bi-Weekly	BI_WEEKLY
Semi-Monthly	SEMI_MONTHLY
Monthly	MONTHLY

To select a period type:

1. Log on to the system.
2. Connect to the database schema containing the Mercury IT Governance Center installation.
3. Run the following query to check the available options.

For example:

```
SQL > SELECT * FROM KTMG_PERIOD_TYPES
```

This query should return the four period types.

4. To select a period type, set the enabled flag to **Y** for the period types.

For example:

```
SQL> UPDATE ktmg_period_types
SQL> SET enabled_flag = 'Y'
SQL> WHERE period_type_name = '<Period Type>'
```

where *<Period Type>* is one of the eligible values listed in [Table 2-1](#).

All eligible period type values must be enabled or disabled. For example, to enable WEEKLY and MONTHLY and disable BI_WEEKLY and SEMI-MONTHLY:

```
SQL> UPDATE ktmg_period_types
SQL> SET enabled_flag = 'Y'
SQL> WHERE period_type_name = 'WEEKLY'

SQL> UPDATE ktmg_period_types
SQL> SET enabled_flag = 'N'
SQL> WHERE period_type_name = 'BI_WEEKLY'

SQL> UPDATE ktmg_period_types
SQL> SET enabled_flag = 'N'
SQL> WHERE period_type_name = 'SEMI_MONTHLY'
SQL>

SQL> UPDATE ktmg_period_types
SQL> SET enabled_flag = 'Y'
SQL> WHERE period_type_name = 'MONTHLY'
```

For the WEEKLY and BI_WEEKLY period types, it is also possible to change the `start_day_code`. By default, the start day is set to MONDAY, but the start day can be any day of the week. Manually set `start_day_code` using SQL. For example, to set `start_day_code` to Sunday:

```
SQL> UPDATE ktmg_period_types
SQL> SET start_day_code = 'SUNDAY'
SQL> WHERE period_type_name = 'WEEKLY'
```

The following lists the `start_day_code` values:

- SUNDAY
- MONDAY
- TUESDAY
- WEDNESDAY
- THURSDAY
- FRIDAY
- SATURDAY
- SUNDAY

Creating Time Periods

This section details how to create time periods. Creating time periods sets the number of time periods available. For example, if the period type is set to WEEKLY and 52 time periods are created, a year's supply of time periods are available. Period Types must be set before creating time periods. Additional time periods can be added at any time.

To create time periods:

1. Log on to the Mercury IT Governance Center system as the application administrator.
2. Go to the `<ITG_Home>/bin` directory.

Where `<ITG_Home>` is the location where the Mercury IT Governance Center was installed.

3. Run the `kGenTimeMgmtPeriods.sh` command as follows:

```
sh kGenTimeMgmtPeriods.sh <number of periods generated>
```

where `<number of periods generated>` is the number of time periods to create for a specific type of time period. A prompt is returned for you to choose the period type. The `kGenTimeMgmtPeriods.sh` script must be run for each enabled period type. By default, time periods start from the current date. For additional `kGenTimeMgmtPeriods.sh` options, execute the script with no parameters and choose **Help**.

Chapter

3

Configuring Time Sheet Policies

In This Chapter:

- *Overview of Time Management Time Sheet Policies*
 - *Configuring Time Sheet Policies*
 - *Configuring General Information*
 - *Configuring Policies*
 - *Configuring Notifications*
 - *Configuring Min/Max Hours*
 - *Configuring Charge Codes*
 - *Configuring Global Time Sheet Policies*
-

Overview of Time Management Time Sheet Policies

Time sheet policies are rules designed to oversee the creation of time sheets. Time sheet policies are written for groups of resources, not for individual users. Once created a time sheet policy can then be applied to an individual resource. This allows one time sheet policy to govern multiple resources, or even be the default (global) time sheet policy.

The following is a list of the rules you can specify for a time sheet policy:

- Period types
- How time is entered (days or periods)
- Minimum and maximum hours to appear on time sheets
- Enforcement levels
- Notifications
- Charge codes

Configuring Time Sheet Policies

This section details how to create a time sheet policy. Once a time sheet policy is created, it can then be applied to a resource. The Time Sheet Policy window consists of the following sections and tabs:

- **General information section.** This section appears above the Time Sheet Policy window tabs and lists the name of the time sheet policy and the period type.
- **Time Sheet Policy tab.** This is the default tab displayed when opening the Time Sheet Policy window. The **Time Sheet Policy** tab sets how time is entered on the time sheet, such as day in hours, period in hours, period in percent. You can also allow a resource to create multiple time sheets (the default is no). You can also set a late flag for resources who fail to release a time sheet for approval.
- **Notifications tab.** The **Notifications** tab configures when notifications should be sent and what the notification should state. Notifications can be used to inform user when time sheets are due or past due.
- **Min/Max Hours tab.** The **Min/Max Hours** tab sets the minimum and maximum hours a time sheet can have for a day, and the maximum number of hours a time sheet can have for a week. You can also set the level of enforcement when the minimum and maximum values are violated.
- **Charge Codes tab.** The **Charge Codes** tab sets a default charge code for the time sheet policy.

Configuring General Information

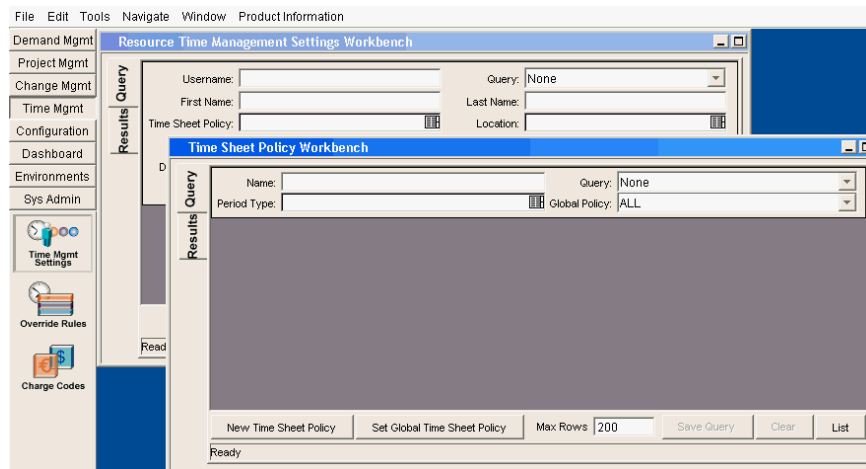
To complete the general information section of a time sheet policy:

1. Open the Mercury IT Governance Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.

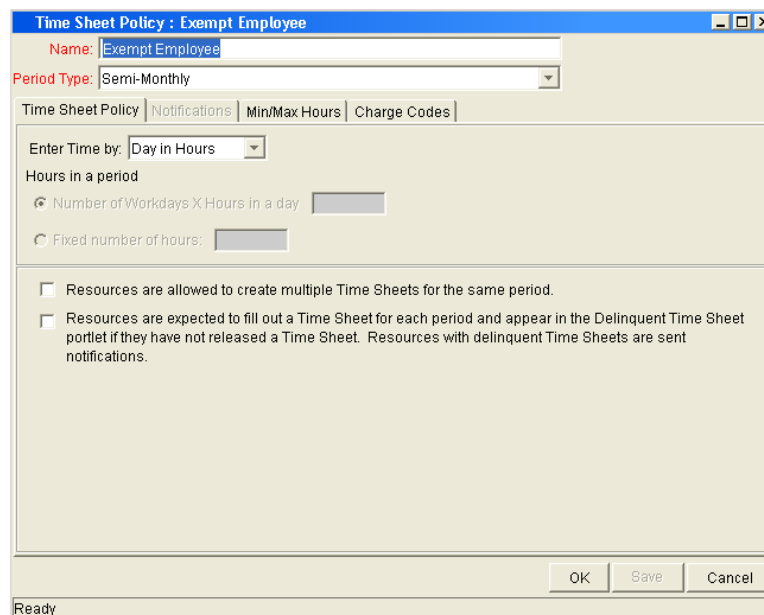


3. In the Time Sheet Policy Workbench, click **New Time Sheet Policy**.

The Time Sheet Policy window opens.

4. At the top of the Time Sheet Policy window, in the Name field, enter the name of the time sheet policy.

5. At the top of the Time Sheet Policy window, in the Period Type field, select the period type from the drop-down list.



6. At the bottom of the Time Sheet Policy window, click **OK**.

The time sheet policy is created.

Configuring Policies

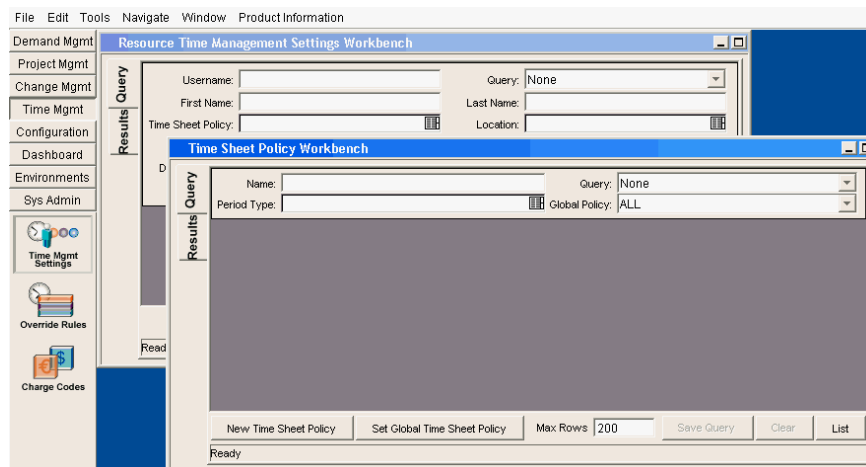
To configure the time sheet policy tab:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



3. In the Time Sheet Policy Workbench, open an existing time sheet policy or create a new time sheet policy.

The Time Sheet Policy window opens.

The screenshot shows a software window titled "Time Sheet Policy : Exempt Employee". It features a "Name" field with the value "Exempt Employee" and a "Period Type" dropdown menu set to "Semi-Monthly". Below these are three tabs: "Time Sheet Policy" (selected), "Notifications", and "Charge Codes". The "Time Sheet Policy" tab contains the following options:

- "Enter Time by:" dropdown menu set to "Day in Hours".
- "Hours in a period" section with two radio buttons:
 - "Number of Workdays X Hours in a day" with an adjacent input field.
 - "Fixed number of hours:" with an adjacent input field.
- Two unchecked checkboxes:
 - "Resources are allowed to create multiple Time Sheets for the same period."
 - "Resources are expected to fill out a Time Sheet for each period and appear in the Delinquent Time Sheet portlet if they have not released a Time Sheet. Resources with delinquent Time Sheets are sent notifications."

At the bottom right of the window are "OK", "Save", and "Cancel" buttons. The status bar at the bottom left shows "Ready".

4. Verify that you are in the **Time Sheet Policy** tab.

The **Time Sheet Policy** tab is the default tab displayed in the Time Sheet Policy window.

5. In the **Time Sheet Policy** tab, complete the fields and click **OK**.

The changes to the time sheet policy are saved.

Configuring Notifications

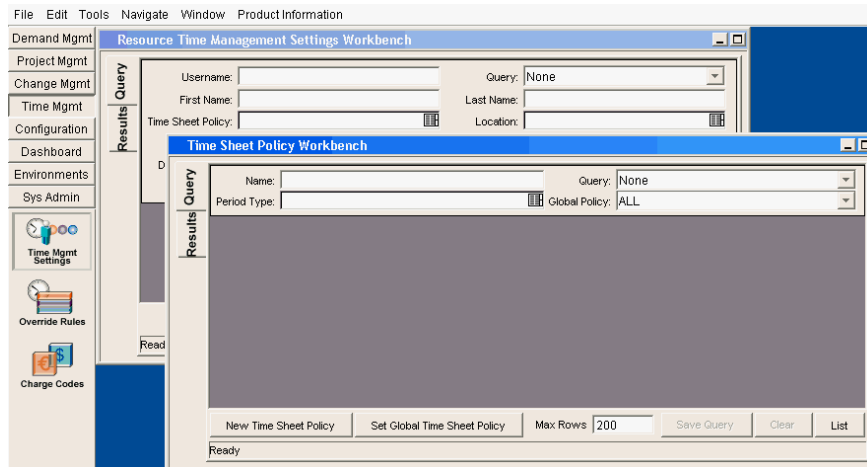
To configure a time sheet policy notification:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

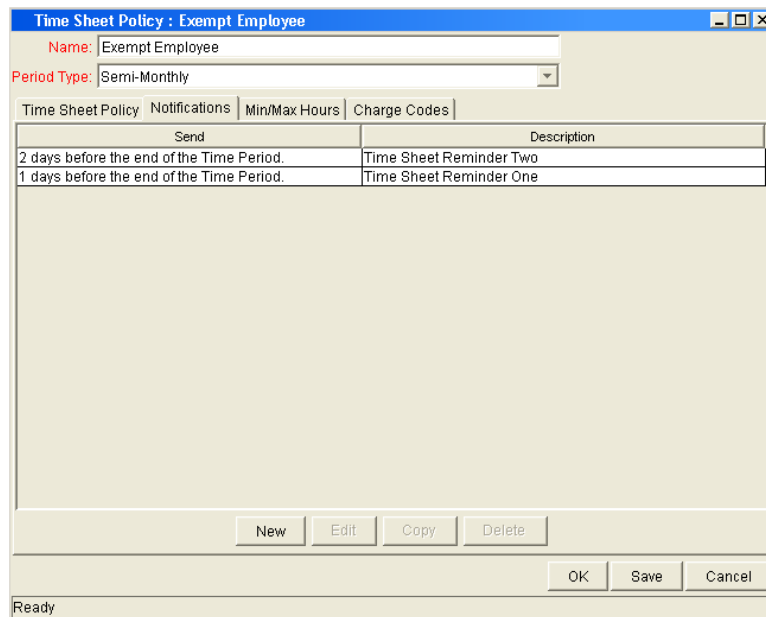
2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



3. In the Time Sheet Policy Workbench, select the **Notifications** tab.

The **Notifications** tab opens.



4. In the **Notifications** tab, click **New**.

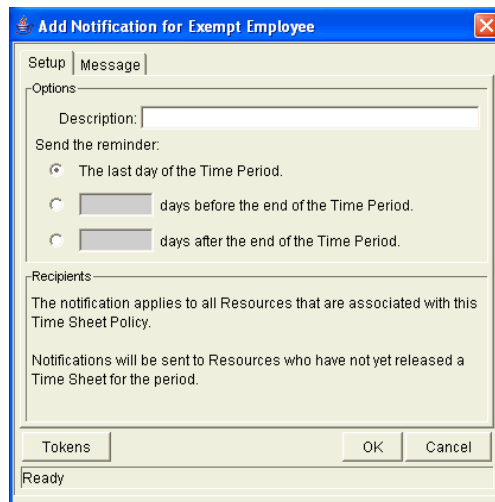
The Add Notifications window opens. The Add Notifications window has two tabs:

- **Setup.** The **Setup** tab configures when to send reminders. This is the default tab displayed.
- **Message.** The **Message** tab configures the content of the notification.

5. Complete the **Setup** tab and **Message** tab.

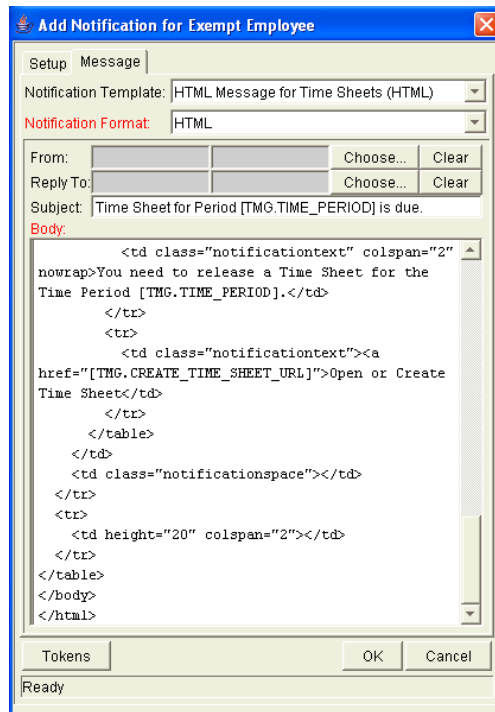
- a. Make sure you are in the **Setup** tab.
- b. In the **Setup** tab, in the Description field, enter a description of the notification.
- c. In the **Setup** tab, in the Send the reminder section, select when to send the notification.

Only one option can be selected.



- d. Select the **Message** tab.

The **Message** tab opens.



- e. In the **Message** tab, in the Notification Template field, select the notification template from the drop-down list.
- f. In the **Message** tab, in the Notification Format field, select the notification format from the drop-down list.

Notifications can be in plain text and HTML.

- g. In the **Message** tab, in the From and Reply To fields, complete the fields.

Click **Choose** to open the Email Header Field window. The following lists the options in the Email Header Field window:

- Enter a Username. Select a specific user to receive the notification. The user must have an email address.
- Enter an Email Address. Enter any email address of the notification.
- Enter a Standard Token. Select from a list of system tokens that corresponds to a user, security group, or email address.
- Enter a User Defined Token. Enter any field token that corresponds to a user, security group, or email address.

Selecting a value will automatically update the Recipient Type field. For example, selecting **Enter a Security Group** will change the Recipient Type field to **Security Group**.

- h. In the **Message** tab, in the Subject field, complete the Subject field of the notification.

The Subject field includes an entry with the token [TS.TIME_PERIOD]. This token displays the current time period. You can use the default Subject field entry or enter your own subject line.

- i. In the **Message** tab, in the Body field, complete the body of the notification.

The Body field includes two entries. Select one of the entries or enter your own message.

- j. In the **Message** tab, click **OK**.

The changes are added to the **Notifications** tab.

6. In the **Notifications** tab, click **OK**.

The changes to the time sheet policy are saved.

Configuring Min/Max Hours

Set the minimum and maximum hours a user can work using the **Min/Max Hours** tab. The following lists the acceptable hours:

- Maximum number of hours per day must be between 1 and 24. Partial hours are permitted, such as 10.5 hours.
- Maximum hours allowed per Time Sheet. The Hours per day x Number of Workdays per Time Period must be between 1 and 24. Partial hours are permitted, such as 10.5 hours.
- Minimum hours allowed per Time Sheet. The Hours per day x Number of Workdays per Time Period must be between 1 and 24. Partial hours are permitted, such as 10.5 hours.

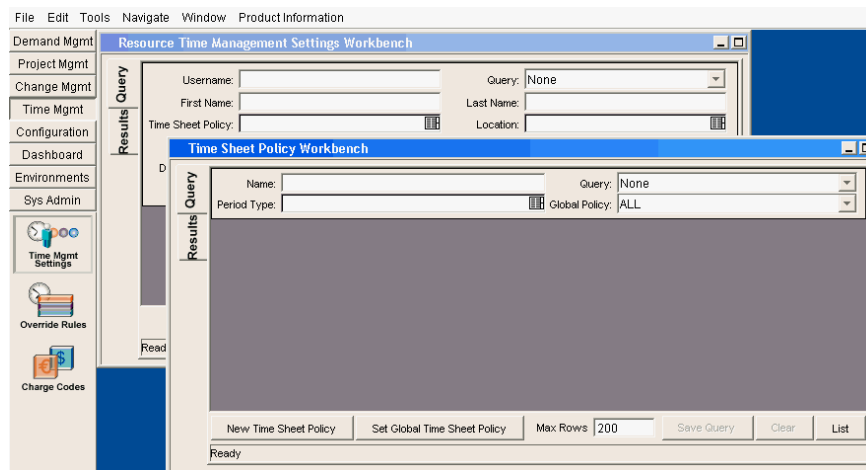
To configure a time sheet policy hours:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

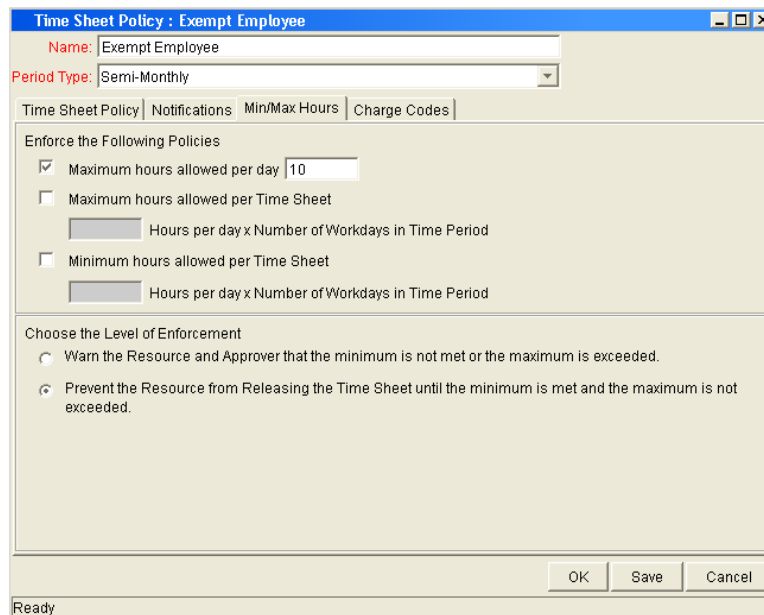
2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



3. In the Time Sheet Policy Workbench, select the **Min/Max Hours** tab.

The **Min/Max Hours** tab opens.



4. In the **Min/Max Hours** tab, in the Enforce the Following Policies section, select the options and complete the hours as required.

Select one or more options and complete the text fields.

5. In the **Min/Max Hours** tab, in the Choose the Level of Enforcement section, select one of the options.

6. At the bottom of the **Min/Max Hours** tab, click **OK**.

The changes to the time sheet policy are saved.

Configuring Charge Codes

Charge codes are created and maintained from the Charge Code Workbench. See [Maintaining Charge Codes on page 55](#) for more detailed information concerning how charge codes are created and maintained.

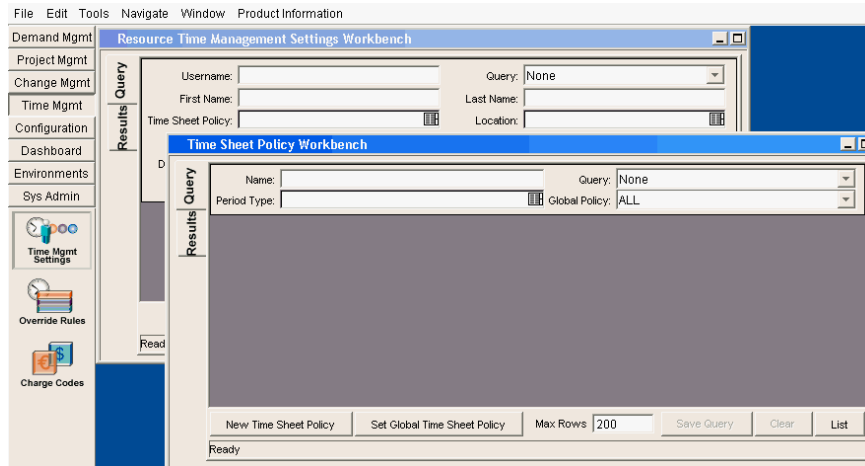
To set a default charge code time sheet policy:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

- From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



- In the Time Sheet Policy Workbench, select **Charge Codes** tab.

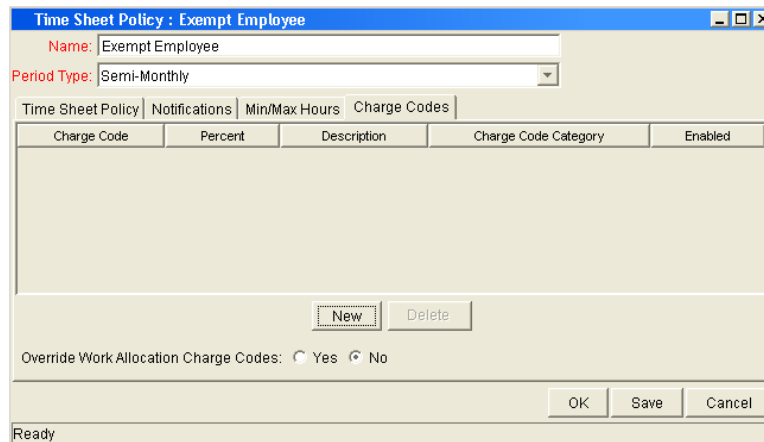
The **Charge Codes** tab opens.

- In the **Charge Codes** tab, add a charge code.

To add a charge code to the **Charge Codes** tab:

- In the **Charge Codes** tab, click **New**.

The Charge Code Selection window opens.



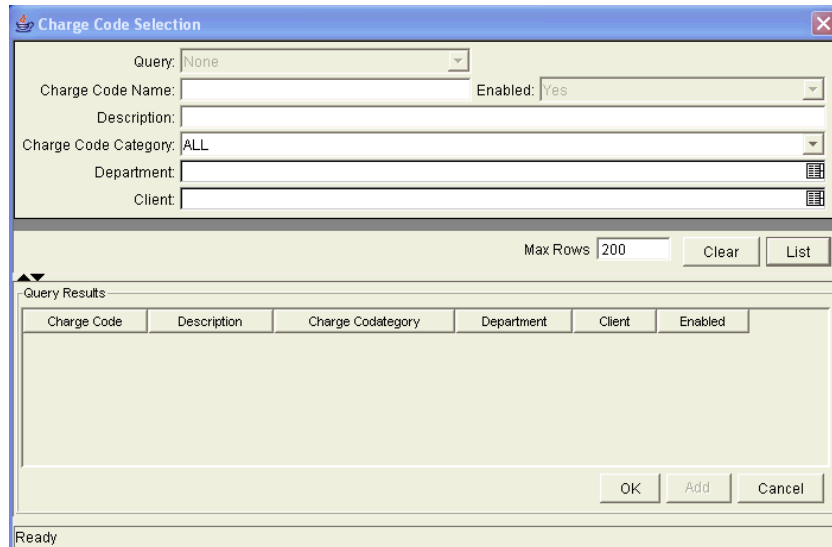
b. Search for an existing charge code.

To search for an existing charge code, complete the fields in the Charge Code Selection window as specified in the following table and click **List**.

Field	Description
Query	Use a saved query.
Charge Code Name	Search for a charge code with the listed charge code name.
Description	Search for a charge code with the listed description.
Charge Code Category	Search for a charge code with the listed charge code category.
Department	Search for a charge code for the listed department.
Client	Search for a charge code for the listed client name.
Enabled	Search for an enabled charge code.

The results of the query are listed in the Charge Code Selection window.

c. In the Charge Code Selection window, select a charge code and click **OK**.



The charge code is added to the **Charge Codes** tab. The Charge Code Selection window closes.

5. In the **Charge Codes** tab, click **OK**.

The changes to the time sheet policy are saved.

Configuring Global Time Sheet Policies

If a specific time sheet policy is not assigned to a resource, the resource is assigned the global time sheet policy. Updates to the global time sheet policy will propagate to the users assigned to the policy.

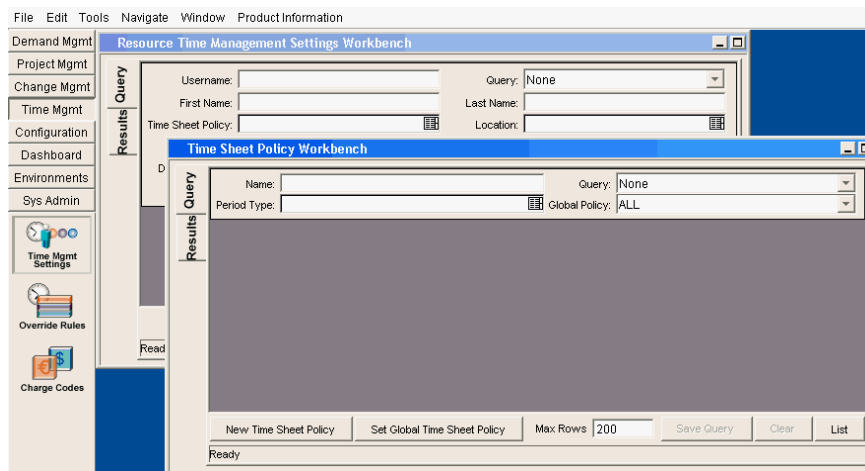
To configure a time sheet policy hours:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

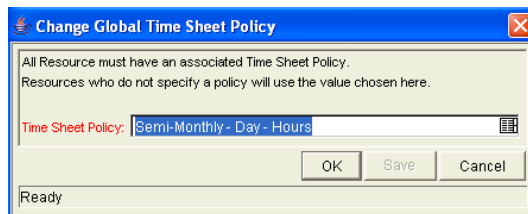
2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



3. In the Time Sheet Policy Workbench, click **Set Global Time Sheet Policy**.

The Change Global Time Sheet Policy window opens.



4. In the Change Global Time Sheet Policy window, select the time sheet policy from the drop-down list.

5. In the Change Global Time Sheet Policy window, click **OK**.

The selected time sheet becomes the global (default) time sheet policy.

Chapter

4

Maintaining Resources

In This Chapter:

- *Overview of Time Management Resources*
 - *Editing Time Management Settings for Resources*
 - *Setting Delegations for Resources*
-

Overview of Time Management Resources

A resource is an individual user who performs work. 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. The following lists the attributes of a resource:

- A resource must be a valid user.
- Resources used in Mercury 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.



Note

Time sheet policies are applied to resources. If you are using time sheet policies, create the time sheet policies before configuring your resources.

Editing Time Management Settings for Resources

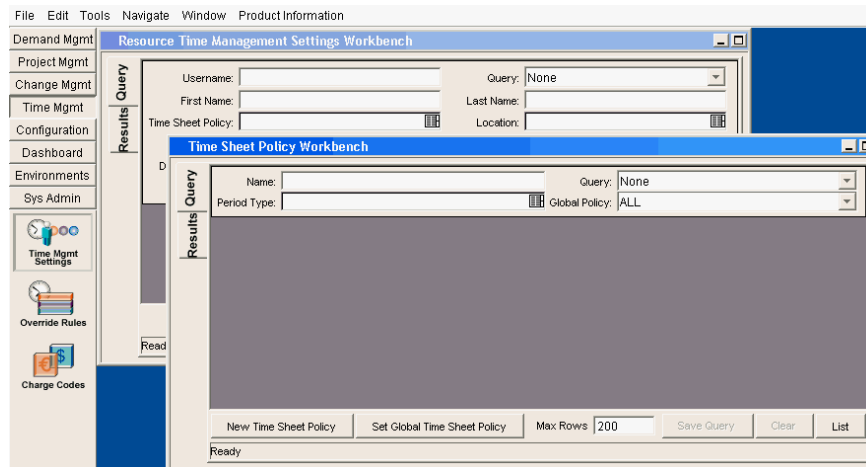
To edit a resource for time management settings:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



3. In the Resource Time Management Settings Workbench, create a new resource or open an existing resource.

The Resource Time Management Settings window opens.

Resource Time Management Settings : Jason Camper

Resource Information | Delegations |

Username: jcamper Start Date: Nov 5, 2004
First Name: Jason End Date:
Last Name: Camper Cost Rate:
Title: Capacity:
Email: jcamper@mercury1.com Department:
Phone Number: Location:
Direct Manager: Category:
Region: Enterprise

Time Sheet Settings

Use the Global Time Sheet Policy: Semi-Monthly - Day - Hours
 Use the Time Sheet Policy: []
 Never send this Resource Time Sheet Notifications.

Default Approval Information

Time Sheet Approver: Resource Denise Newell
Billing Approver: Resource Fredrick Schmidt

Edit Resource Edit User OK Save Cancel

Ready

4. Make sure you are in the **Resource Information** tab.

The **Resource Information** tab is the default tab displayed in the Time Management Settings window.

5. In the **Resource Information** tab, complete the fields in the Time Sheet Settings section.

Select one of the three options:

- Use the Global Time Sheet Policy. Selecting this option assigns the global time sheet policy to the resource.
- Use the Time Sheet Policy. Selecting this option assigns the selected time sheet policy to the resource. Select the time sheet policy from the drop-down list.
- Never send this Resource Time Sheet Notifications. Selecting this option makes the resource exempt from time sheet notifications.

6. In the **Resource Information** tab, complete the fields in the Default Approver Information section.

Complete the following fields:

- Time Sheet Approver. These two fields indicate the default approvers of released time sheets for this resource.
- Billing Approver. These two fields indicate the users who can freeze and close time sheets for this resource.

7. In the **Resource Information** tab, click **OK**.

The changes to the Time Management settings are saved.

Setting Delegations for Resources

A delegation is where one resource (delegatee) is assigned the functions of another resource (delegator). Delegations have specific start dates and end dates, and are intended to be temporary reassignments.

For example, 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 their are 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 code access is not transferred from the delegator to the delegatee.

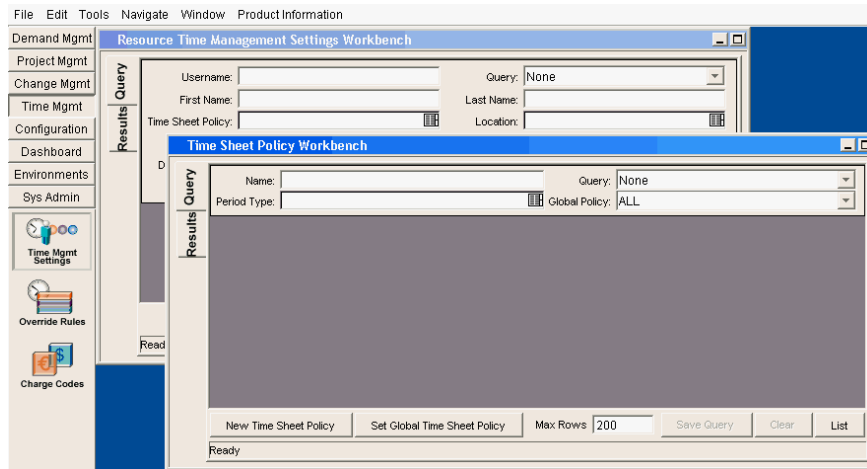
To assign delegations for a resource:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

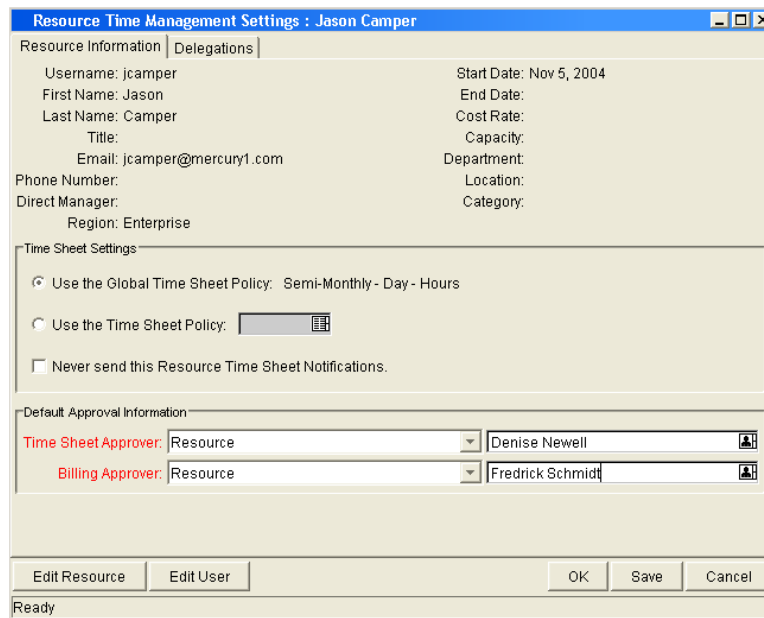
2. From the shortcut bar, select **Time Mgmt > Time Mgmt Settings**.

The Time Sheet Policy Workbench and Resource: Time Management Settings Workbench open.



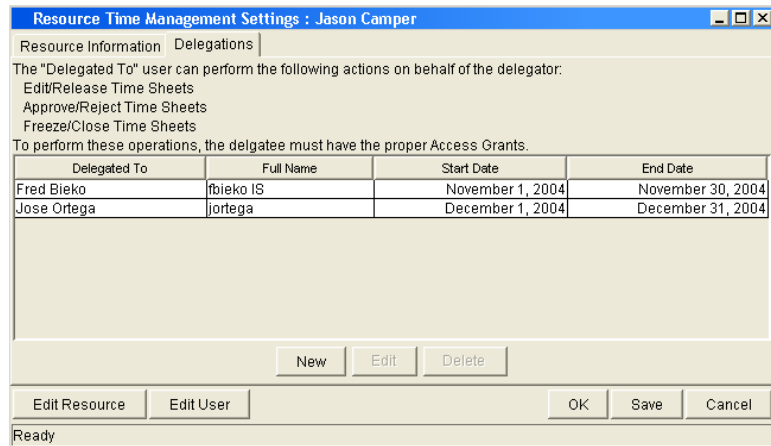
3. In the Resource Time Management Settings Workbench, create a new resource or open an existing resource.

The Resource Time Management Settings window opens.



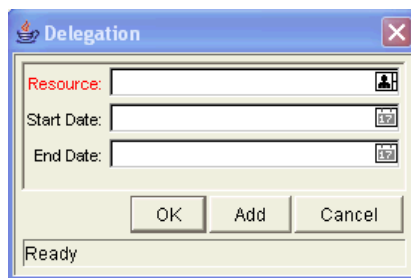
4. In the Time Management Settings window, select the **Delegations** tab.

The **Delegations** tab opens.



5. In the **Delegations** tab, click **New**.

The Delegation window opens.



6. In the Delegation window, complete the fields and click **OK**.

The Delegation window closes. The **Delegation** tab is displayed.

7. In the **Delegation** tab, click **OK**.

The changes to the Time Management settings are saved.

Chapter 5 Maintaining Activities

In This Chapter:

- *Overview of Activities*
 - *Creating Activities*
 - *Editing Activities*
 - *Deleting Activities*
-

Overview of 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. Activities can also be used when SOP 98-1 functionality is not enabled, but they cannot be marked as capitalized, nor will projects or tasks associated with any activities track capitalization data. The following lists common activities:

- Design
- Design Review
- Coding
- Alpha Testing

Creating Activities

To create a new activity:

1. Open the Workbench.

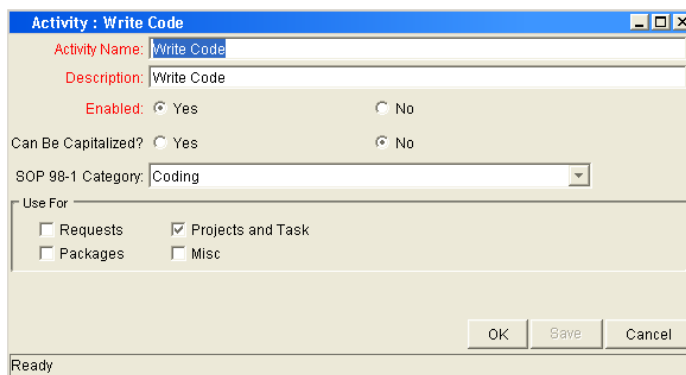
For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configuration > Activities**.

The Activities Workbench opens.

3. In the Activity Workbench, click **New Activity**.

The Activity window opens.



4. In the Activity window, complete the fields and click **OK**.

The changes to the activity are saved. The Activity window closes. The **Results** tab of the Activity Workbench window returns.

5. In the **Results** tab of the Activity Workbench window, click **Refresh**.

Check to verify the new activity is listed.

Editing Activities

To edit an existing activity:

1. Open the Workbench.

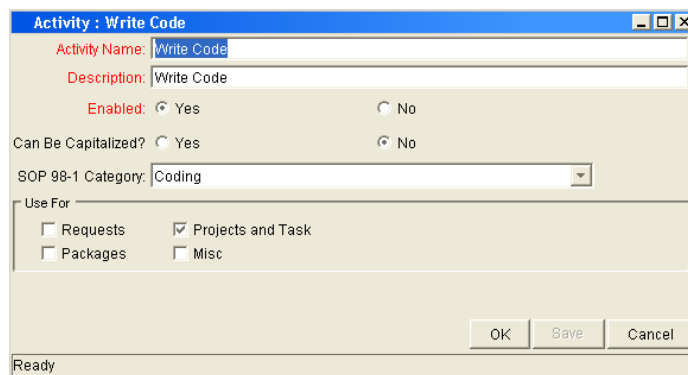
For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configuration > Activities**.

The Activities Workbench opens.

3. In the Activities Workbench, open an existing activity.

The Activity window opens.



4. In the Activity window, edit the fields and click **OK**.

The changes to the activity are saved.

Deleting Activities

To delete an activity:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configuration > Activities**.

The Activities Workbench opens.

3. In the **Query** tab, enter the search criteria for the activity and click **List**.

The results are listed in the **Results** tab.

4. In the **Results** tab, select the activity and click **Delete**.

A Question Dialog opens.

5. In the Question Dialog, click **Yes**.

The activity is deleted.

Chapter

6

Maintaining Charge Codes

In This Chapter:

- *Overview of Charge Codes*
 - *Charge Code Behavior*
 - *Creating Charge Codes*
 - *Editing Charge Codes*
 - *Deleting Charge Codes*
-

Overview of Charge Codes

This chapter details procedures to configure and maintain charge codes. Charge codes are entities used as links between work items and charge accounts.

In some organizations, actual time is used as information for charge backs to an internal customer, external customer, or requestor. Mercury Time Management does not explicitly perform this charge back or billing function. Time Management can specify charge codes, so links can be created between work items and charge accounts. This allows the time information to be easily extracted for a billing system.

Charge codes do not have hierarchical information or any dependencies. Charge codes are simply a list of values. The Charge Code window creates, views, and updates charge codes.



In order for newly created charge codes to be visible to a user, that user must be a member of a security group with Restrict Charge Codes to the following rules deselected in the **Charge Codes** tab or that user must have the appropriate rules configured to allow access.

Charge Code Behavior

Default charge codes can be set for a time sheet line according to the following order of precedence:

1. **Setting the Charge Codes according to the work allocation.** A work allocation can have associated charge codes and settings to determine if charge codes are required and/or updateable. When a user adds a work item to a time sheet for the first time, the work allocation charge codes become assigned to the time sheet line if any have been specified. If the charge codes are updateable, the user may change them. If the charge codes are required, the user must have charge codes for the line. If no charge codes are entered (and charge codes are required), the time sheet shows an error message upon submission. Further changes to the work allocation charge codes after the time sheet line has been created are not reflected.

2. **Setting the Charge Codes according to the time sheet policy.** The charge codes tab in the Time Sheet Policy window allows a user to set default charge codes for a time sheet policy. In the absence of work allocation charge codes, the default charge codes for a resource (via their time sheet policy) are set for every time sheet line added to a time sheet. However, if work allocation charge codes exist, the Override Work Allocation Charge Codes flag in the time sheet policy determines which charge codes are applied.
3. **Setting the Charge Codes according to the Override Rules.** The last way to set charge codes is with override rules. If an override rule matches the criteria of the time sheet and charge codes are present as outputs of the override rule, those charge codes are applied (if none have been applied yet). The override rule takes precedence over time sheet policy and work allocation charge codes if the appropriate override rule flags are set.

Creating Charge Codes

To create a new charge code:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Charge Code**.

The Charge Code Workbench opens.

3. In the Charge Code Workbench **Query** tab, click **New Charge Code**.

The Charge Code window opens.

The screenshot shows a dialog box titled "Charge Code : 00123". It contains several input fields: "Charge Code Name" with the value "00123", "Description" with "IS Charge Code", "Charge Code Category" with a dropdown menu showing "Billable", "Department" with "IS", and "Client" which is empty. There are radio buttons for "Enabled", with "Yes" selected. At the bottom, there are "OK", "Save", and "Cancel" buttons. The status bar at the bottom left says "Ready".

4. In the Charge Code window, complete the fields as specified in the following table and click **OK**.

Field	Description
Charge Code Name	The name of the charge code.
Description	The description of the charge code.
Charge Code Category	The category of the charge code.
Department	The department of the charge code.
Client	The client associated with the charge code.
Enabled	Indicates whether or not the charge code is enabled.

The charge code is added to the system.

Editing Charge Codes

To edit an existing charge code:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Charge Code**.

The Charge Code Workbench opens.

3. Open an existing charge code.

The Charge Code window opens.

4. Complete the fields as specified in the following table and click **OK**.

Field	Description
Charge Code Name	The name of the charge code.
Description	The description of the charge code.
Charge Code Category	The category of the charge code.
Department	The department of the charge code.
Client	The client associated with the charge code.
Enabled	Indicates whether or not the charge code is enabled.

The changes to the charge code are saved.

Deleting Charge Codes

To delete a charge code:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Charge Code**.

The Charge Code Workbench opens.

3. In the **Query** tab, enter the search criteria and click **List**.

The results are listed in the **Results** tab.

4. In the **Results** tab of the Charge Code Workbench, select an existing charge code and click **Delete**.

A Question Dialog opens.

5. In the Question Dialog, click **Yes**.

The charge code is deleted.

Chapter

7

Maintaining Override Rules

In This Chapter:

- *Override Rule Behavior*
 - *Override Rule Precedences*
 - *Creating Override Rules*
 - *Editing Override Rules*
 - *Deleting Override Rules*
-

Override Rule Behavior

Override rules are designed to override default cost rates and other default cost-related attributes. To initiate an override rule, the attributes of a time sheet line or the attributes of the user, must equal an override rule's dependencies. For example, *Figure 7-1* shows a time sheet line's work item type, work item set and work item meet the dependencies of the override rule. The result is that the override rule cost rate (\$75 an hour) and charge code (4455) are used for the hours recorded on that time sheet line.

All override rules have two parts:

- **Dependencies.** The attributes required to initiate an override rule.
- **Results.** The resulting action when an override rule's dependencies are met.

All of an override rule's dependencies must be met to invoke the override rule. If two or more override rules apply to a time sheet's line, the override rule with the highest precedence takes effect. See *Override Rule Precedences* for detailed information concerning override rule precedence.

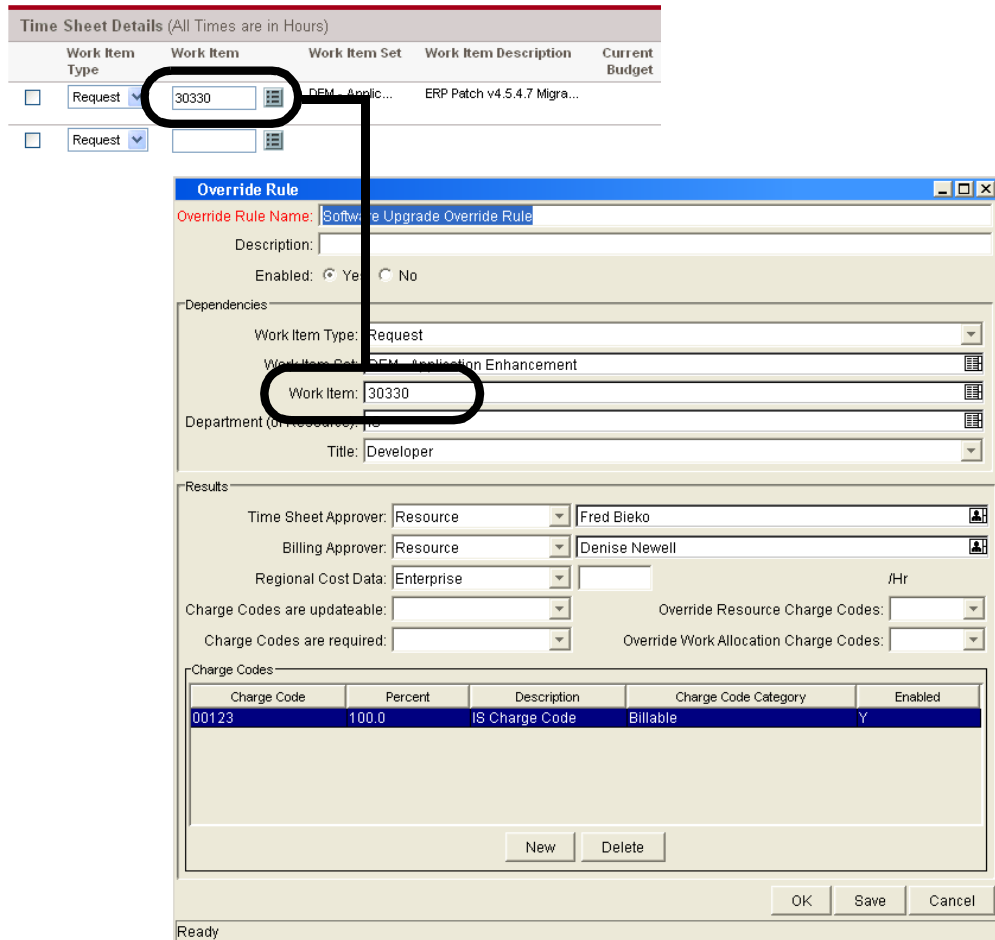


Figure 7-1. Override rule and time sheet

All override rule results do not take effect at the same time. Result attributes take effect at different times of the Time Management process. [Table 7-1](#) lists attributes and when the override rule result takes effect.

Table 7-1. Attributes set by override rules

Attribute	Rule Sets Attribute When
Time Sheet Approver	Time sheet is saved.
Billing Approver	Time sheet is saved.
Cost Rate	Time sheet is saved.
Charge Codes are Updateable	Time sheet is saved.
Charge Codes are Required	Time sheet is saved.
Override Resource Charge Codes	Time sheet line is first created.
Override Work Allocation Charge Codes	Time sheet line is first created.
Charge Codes	Time sheet line is first created.



Since time sheets are not approved line-by-line, approval overrides only take effect when all work items have the same approver. Approvals for all lines must match to change the approval defaults.

Override Rule Precedences

All of an override rule’s dependencies must be met to invoke an override rule. If two or more override rules are met, the override rule with the highest precedence takes effect.

Override rule precedence is based on which dependencies, and how many dependencies, are included in the override rule. For example, an override rule with five dependencies has a higher precedence value than an override rule with only one dependency. *Table 7-2* displays the order of override rule precedence and the required override rule dependencies.

Table 7-2. Override rule precedence

Precedence	Work Item Type	Work Item Set	Work Item	Department	Title
1	X	X	X	X	X
2	X	X	X	X	
3	X	X	X		X
4	X	X	X		
5	X	X		X	X
6	X	X		X	
7	X	X			X
8	X	X			
9	X			X	X
10	X			X	
11	X				X
12	X				
13				X	X
14				X	
15					X
16					

Override Rule Precedence - Dependencies

Override rule dependencies are met by the attributes of the time sheet line and by the attributes of the user. Consider the following cases and the dependencies listed in [Table 7-3](#).

Table 7-3. Precedence example one - dependencies

Precedence	Override Rule	Dependencies			Results
		Work Item Type	Work Item	Department	
4	Rule 1	Project	Doc Test 1		Cost Rate = \$95.00
6	Rule 2	Project		Development	Cost Rate = 75.00

Case One. An engineer from Development is working on the **Project Doc Test 1**. The dependencies for both Override Rule 1 (Work Item Type and Work Item) and Override Rule 2 (Work Item Type and Department) are met. Since Override Rule 1 has a higher Precedence, the engineer's Cost Rate is set to **\$95.00**.

Case Two. An accountant from Finance is working on the **Project Doc Test 1**. The dependencies for Override Rule 1 are met (Work Item Type and Work Item). The dependencies for Override Rule 2 are not met (Department). The accountant's Cost Rate is set to **\$95.00** an hour.

Case Three. An engineer from Development is working on the **Project Doc Test 2**. The dependencies for Override Rule 1 are not met (Work Item). The dependencies for Override Rule 2 are met (Work Item Type and Department). In fact, any Project the engineer from Development works on matches the dependencies of Override Rule 2. The engineer's Cost Rate is set to **\$75.00** an hour.

Case Four. An accountant from Finance is working on the **Project Doc Test 2**. The dependencies for Override Rule 1 are not met (Work Item). The dependencies for Override Rule 2 are not met (Department). The accountant's Cost Rate is their default **Cost Rate**.

Override Rule Precedence - Results

If a results field of a override rule is not set (left blank), other matching override rules with less precedence can fill-in the blank result fields. Consider the previous cases and the override rule results listed in [Table 7-4](#).

Table 7-4. Precedence example two - results

Override Rule	Precedence	Cost Rate	Charge Code
Rule 1	4	\$95.00	
Rule 2	6	\$75.00	5555

Case One. The engineer from Development met the dependencies for both Override Rule 1 and Override Rule 2. The attributes from Override Rule 2 “fill in” the blank attributes in Override Rule 1. The engineers’ Charge Code is set to 5555. The engineers’ Cost Rate is set to \$95.00.

Case Two. The accountant from Finance met the dependencies for Override Rule 1 only. The accountant’s default Charge Code is used. The accountant’s Cost Rate is set to **\$95.00**.

Case Three. The engineer from Development met the dependencies for Override Rule 2 only. The engineers’ Charge Code is set to 5555. The engineer’s Cost Rate is set to **\$75.00**.

Case Four. The accountant from Finance did not met the dependencies for Override Rule 1 or Override Rule 2. The accountant’s default Charge Code is used. The accountant’s default Cost Rate is used.

Creating Override Rules

To create a new override rule:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Override Rule**.

The Override Rule Workbench opens.

3. In the Override Rule Workbench, click **New Override Rule**.

The Override Rule window opens.

Override Rule

Override Rule Name: Mktg Demo Override

Description: Mktg Demo Override Rule

Enabled: Yes No

Dependencies

Work Item Type: Task

Work Item Set: Mktg Demo Beta Test Phase

Work Item: Run Test Script

Department (of Resource): IS

Title: QA Tester

Results

Time Sheet Approver: Resource | Fredrick Schmidt

Billing Approver: Resource | Denise Newell

Regional Cost Data: Enterprise | /Hr

Charge Codes are updateable: Yes

Charge Codes are required: No

Override Resource Charge Codes: Yes

Override Work Allocation Charge Codes: Yes

Charge Code	Percent	Description	Charge Code Category	Enabled
00134	100.0	Manufacturing Charge Code	Billable	Y

New Delete

OK Save Cancel

Ready

4. In the Override Rule window, complete the fields as specified in the following table.

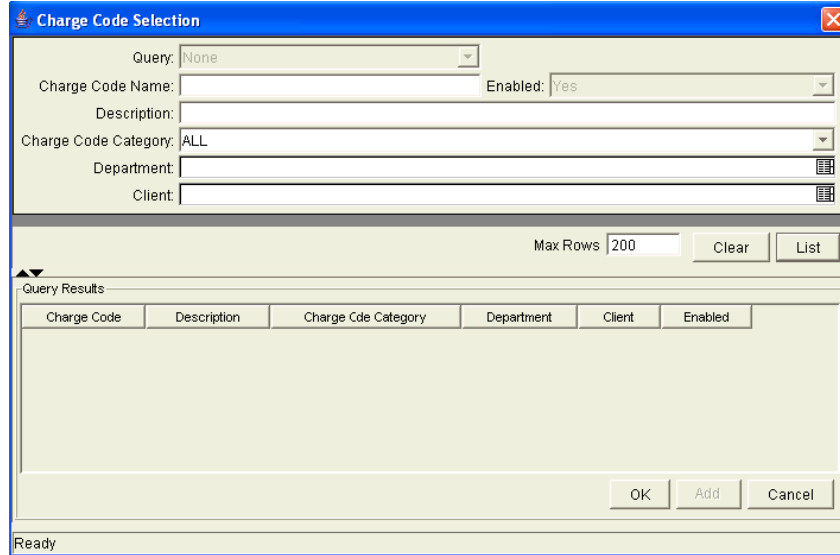
Field	Description
Override Rule Name	The name of the override rule.
Description	The description of the override rule.
Enabled	Indicates whether the override rule is enabled or not.
Dependencies	
Work Item Type	Override rule checks the time sheet lines for a specific work item type (request, package, project, task, or miscellaneous).
Work Item Set	Override rule checks the time sheet lines for a specific work item set, which can be a specific request type, a specific master project, or a specific package workflow. This field is dependent on the work item type value.
Work Item	Override rule checks the time sheet lines for a specific work item, which can be a specific request, a specific package, a specific project, miscellaneous item, or a specific task. This field is dependent on the work item set value.
Department (of Resource)	Override rule checks the time sheet lines for a specific department.
Title	Override rule checks the time sheets for resources with a given title.
Results	
Time Sheet Approver	These two fields set the override time sheet approval information.
Billing Approver	These two fields set the override billing approval information (for example, who can freeze and close a time sheet).
Cost Rate	Sets the cost rate (in dollars per hour) to use when calculating cost against a work item.
Charge Codes are updateable	Sets whether the charge codes are updateable after they have been entered by the override rule.
Override Resource Charge Codes	Sets whether to override charge codes that have been defaulted by the Charge Codes tab in the Time Sheet Policies window.
Charge Codes are required	Sets whether the charge codes are required after the override rule is executed.
Override Work Allocation Charge Codes	Sets whether to override charge codes that have been defaulted by the work allocation.

Field	Description
Charge Codes	
Charge Code	The charge code or codes assigned to the override rule.
Percent	The percentage of charge code or codes assigned to the override rule. The total percentage must equal 100 percent.
Description	The description of the charge code or codes assigned to the override rule.
Charge Code Category	The category of the charge code or codes assigned to the override rule.
Enabled	Displays whether or not the charge code or codes assigned to the override rule are enabled.

5. In the Charge Codes section, click **New**.

The Charge Code Selection window opens.

6. In the Charge Code Selection window, enter any search criteria in the appropriate fields in the **Query** section and click **List**.



The **Results** section opens, displaying the results of the search. To display all charge codes, click **List** without entering search criteria.

7. In the Query Results section, select the charge code and click **OK**.

The charge code is added to the override rule and the Charge Code Selection window closes.

8. In the Override Rule window, click **OK**.

The changes to the override rule are saved.

Editing Override Rules

To edit an override rule:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Override Rule**.

The Override Rule Workbench opens.

3. Open an existing override rule.

The Override Rule window opens.

4. In the Override Rule window, complete the fields as specified in the following table and click **OK**.

Field	Description
Override Rule Name	The name of the override rule.
Description	The description of the override rule.
Enabled	Indicates whether the override rule is enabled or not.
Dependencies	
Work Item Type	Override rule checks the time sheet lines for a specific work item type (request, package, project, task, or miscellaneous).
Work Item Set	Override rule checks the time sheet lines for a specific work item set, which can be a specific request type, a specific master project, or a specific package workflow. This field is dependent on the work item type value.

Field	Description
Work Item	Override rule checks the time sheet lines for a specific work item, which can be a specific request, a specific package, a specific project, miscellaneous item, or a specific task. This field is dependent on the work item set value.
Department (of Resource)	Override rule checks the time sheet lines for a specific department.
Title	Override rule checks the time sheets for resources with a given title.
Results	
Time Sheet Approver	These two fields set the override time sheet approval information.
Billing Approver	These two fields set the override billing approval information (for example, who can freeze and close a time sheet).
Cost Rate	Sets the cost rate (in dollars per hour) to use when calculating cost against a work item.
Charge Codes are updateable	Sets whether the charge codes are updateable after they have been entered by the override rule.
Override Resource Charge Codes	Sets whether to override charge codes that have been defaulted by the Charge Codes tab in the Time Sheet Policies window.
Charge Codes are required	Sets whether the charge codes are required after the override rule is executed.
Override Work Allocation Charge Codes	Sets whether to override charge codes that have been defaulted by the work allocation.
Charge Codes	
Charge Code	The charge code or codes assigned to the override rule.
Percent	The percentage of charge code or codes assigned to the override rule. The total percentage must equal 100 percent.
Description	The description of the charge code or codes assigned to the override rule.
Charge Code Category	The category of the charge code or codes assigned to the override rule.
Enabled	Displays whether or not the charge code or codes assigned to the override rule are enabled.

The changes to the override rule are saved.

Deleting Override Rules

To delete an override rule:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Time Mgmt > Override Rule**.

The Override Rule Workbench opens.

3. In the **Query** tab, enter the search criteria and click **List**.

The results are listed in the **Results** tab.

4. In the **Results** tab, select an override rule and click **Delete**.

A Question Dialog opens.

5. In the Question Dialog, click **Yes**.

The override rule is deleted.

Chapter

8

Creating and Maintaining Time Management Filters

In This Chapter:

- *Filter Behavior*
 - *General Filters*
 - *Request Filters*
 - *Package Filters*
 - *Project Filters*
 - *Adding Filter Fields*
 - *Overview of Adding Filter Fields*
 - *Before You Begin*
 - *Modifying SQL Validations*
 - *Adding New Filter Fields to Request Types*
 - *Updating Database Tables*
-

Filter Behavior

The work item filters limit the work item auto-complete list on work allocations or time sheets. *Figure 8-1* shows a typical time sheet with the Work Item auto-complete list and the work item filters.

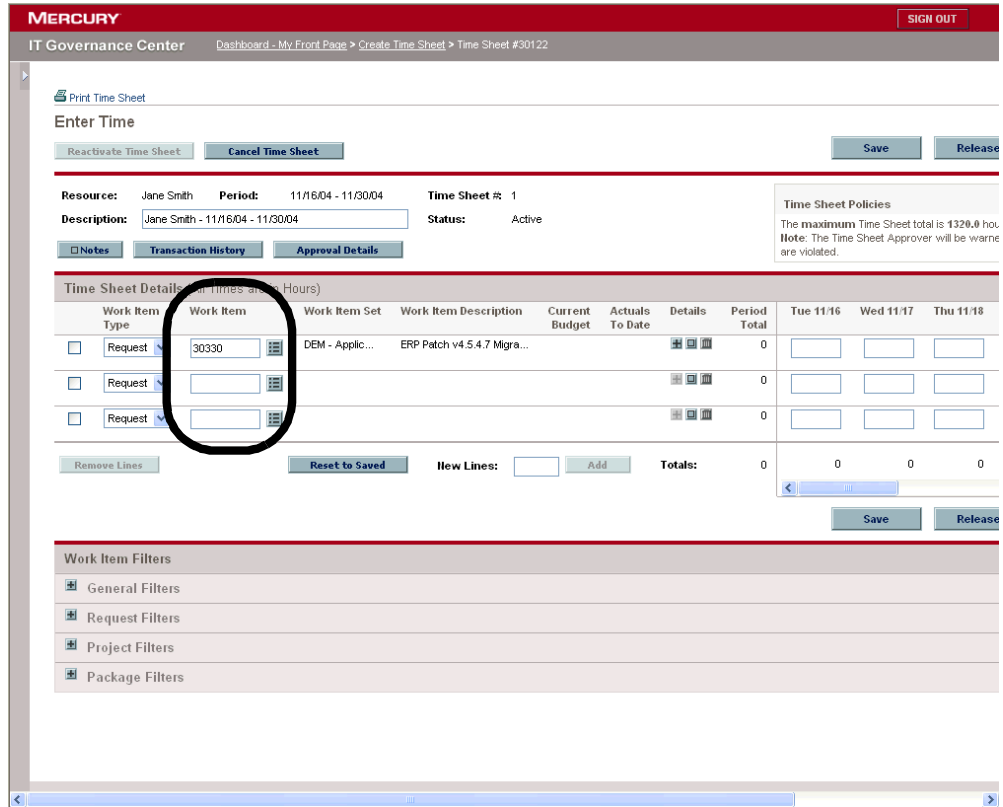


Figure 8-1. Time sheet

General Filters

General filters are non-task specific filters. [Table 8-1](#) lists the general filters.

Table 8-1. General filters

Filter	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.
Include Closed?	Indicates 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 8-2](#) lists the request filters.

Table 8-2. Request filters

Filter	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 8-3](#) lists the package filters.

Table 8-3. Package filters

Filter	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 8-4](#) lists the project filters.

Table 8-4. Project filters

Filter	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?	Indicates 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.

Adding Filter Fields

This section details how to add a filter to the work item filters. The work item filters appear on the Create Allocations page and Time Sheet page. For an example of a typical Time Sheet page with the work item filters see [Figure 8-1](#).



Note

Modifications to the Time Management work item filters should be done with the help of Mercury IT Governance Professional Services. Updating the database requires privileges a DBA might not want to grant to the application administrator.

Overview of Adding Filter Fields

This section provides an overview on how to add a filter field to the work item filters. The following steps are required to add a filter field:

- Create a new SQL validation to include the SQL for the new work item filter. The Time Management SQL validations are Mercury-supplied data and cannot be edited. Creating a new SQL validation requires the following steps:
 - Copy an existing validation.
 - Edit the copied validation to include SQL for the new filter field.
- See [Modifying SQL Validations](#) for complete instructions on how to change the SQL validation for the work item filters.
- Add the new filter field to the work item filters. Adding the new filter field to the work item filters requires editing the TMG Configurable Filters request type. See [Adding New Filter Fields to Request Types](#).
 - Update the database. See [Updating Database Tables](#).

Before You Begin

Before adding a filter field, the following must be determined:

- The name of the new SQL validation. The name of the new SQL validation depends on whether the new filter field is being added to the work allocations page or Time Sheet Details page. See [Table 8-5](#).

Table 8-5. Naming examples

Current Name	Proposed Name
TMG - Work Allocation Work Bench - work item	TMG - Work Allocation Work Bench - work item New
TMG - Time Sheet Details - work item	TMG - Time Sheet Details - work item New

- The SQL to support the new filter field. Knowledge of SQL and database schema are required to write the SQL for the new filter field.
- The name of the new filter field, such as My Creation Date.
- The token for the new filter field, such as MY_CREATION_DATE. When editing the SQL code in the SQL validation, add the FLTR prefix to the token name, such as FLTR.MY_CREATION_DATE.

Modifying SQL Validations

This section details how to modify the work item filter's SQL validation. The SQL validation must be copied from the existing SQL validation and edited with new SQL code to support the new filter field.

To modify the filter SQL validation:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configuration > Validation**.

The Validation Workbench window opens.

3. In Validation Name, enter “TMG” and click **List**.

The **Results** tab opens. All entries with the TMG initials are included in the results.

4. In the **Results** tab, select the proper validation.

The correct validation depends on whether the new filter field is being added to the Work Allocations page or Time Sheet page. The following lists the Validation names:

- TMG - Work Allocation Work Bench - Work Item
- TMG - Time Sheet Details - Work Item

5. In the **Results** tab, click **Copy** to copy the selected validation.

The Copy Validation window opens.

6. In the Copy Validation window, in the Validation Name field, enter the name of the new validation.

The following lists the possible names for the new validation:

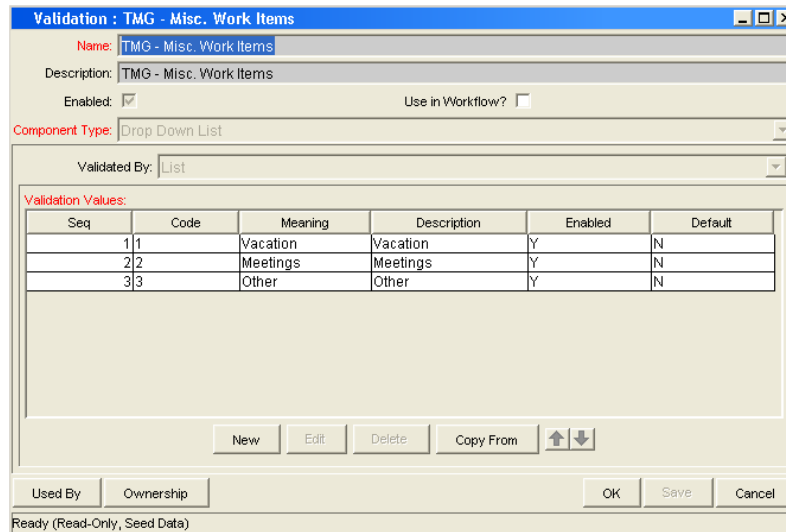
- TMG - Work Allocation Work Bench - Work Item New
- TMG - Time Sheet Details - Work Item New

7. In the Copy Validation window, click **Copy**.

A question dialog opens.

8. In the question dialog, click **Yes**.

The Validation window opens.



9. In the Validation window, edit the SQL.

Include the new prefixed Token, such as FLTR.MY_CREATION_DATE. The prefixed Token should be added to the WHERE clause of the validation SQL.

10. In the Validation window, click **OK**.

The changes to the validation are saved.

For More Information

For more information concerning Mercury IT Governance Center schema, see the *Technical Reference Manual*.

Adding New Filter Fields to Request Types

To add a new filter field to the request type:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Demand Mgmt > Request Types**.

The Request Type Workbench opens.

3. In the Request Type field of the **Query** tab, enter **TMG** and click **List**.

The **Results** tab opens with Time Management request types loaded.

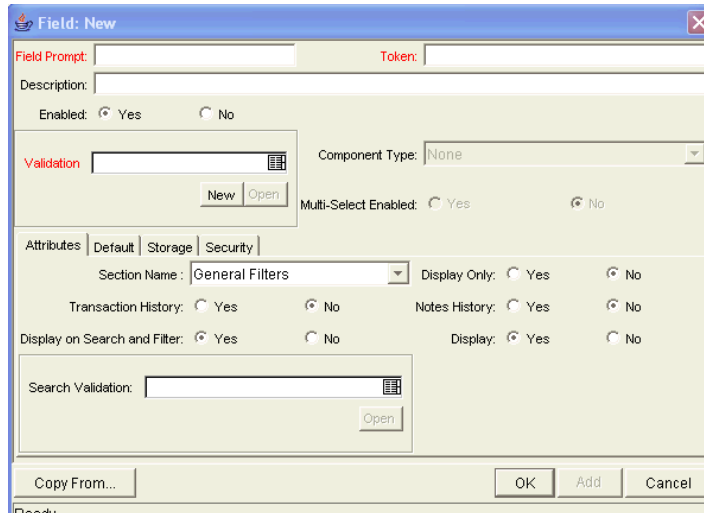
4. In the **Results** tab, select the TMG Configurable Fields request type and click **Open**.

The Request Type window opens.

Prompt	Token	Enabled	Component Type	Validation
Summary				
General Filters				
Request Filters				
Project Filters				
Package Filters				

5. In the Request Type window, in the **Fields** tab, click **New**.

The Field: New window opens.



6. In the Field: New window, complete the fields as specified in the following table and click **OK**.

Field	Description
Field Prompt	The name of the new filter field, such as “My Creation Date.” This field name appears in the Work Item Filters section.
Token	The token for the new field, such as MY_CREATION_DATE. This token must be the same as the token added to the SQL statement in Modifying SQL Validations on page 80 .
Enabled	Enable the field for use. Yes enables the field. No disables the field.
Validation	The validation for the new filter field. This validation is for the validation for the work item filter field. The section, Modifying SQL Validations on page 80 , creates the validation for the work item auto-complete list. Depending on the selection, this field enables the component and multi-select fields.
Component Type	The type of field, such as drop-down list or text field. This field is enabled by the validation field.
Multi-Select Enabled	Can multiple entries be selected from this field. This field is enabled by the validation field.



Internally, tokens are prefixed with “FLTR.” For example, the token MY_CREATION_DATE would become FLTR.MY_CREATION_DATE. When editing the Request Type field, use a non-prefixed token name, such as MY_CREATION_DATE.

7. In the Field: New window, click the **Attributes** tab.

The **Attributes** tab opens.

8. In the **Attributes** tab, complete the fields as specified in the following table and click **OK**.

Field	Description
Section Name	The work item field section the field should reside.
Display Only	Sets if the field is only displayed and cannot be updated, even at initial request entry.
Transaction History	Turns transaction auditing on or off for this field. If it is set to Yes , whenever this field changes in a request, the change is logged in a transaction history table.
Notes History	Turns notes auditing on or off for this field. If it is set to Yes , whenever this field changes in a request, the change will be logged in Notes for the Request.
Display on Search and Filter	Sets if the field will be displayed in Search and Filter pages in the HTML interface.
Display	Sets if the field will be displayed in the HTML interface.

The changes to the new field are saved and the **Attributes** tab closes. The Request Type window is displayed.

9. In the Request Type window, click **OK**.

10. The changes to the request type are saved.

Updating Database Tables

The database tables `KNTA_VALIDATION_PROFILES` and `KNTA_FIELD_FILTERS` must be updated to reference the new SQL validation. Updating the database tables requires privileges a DBA might not want to grant to the application administrator.

To update the database tables:

1. Log on to the system.
2. Connect to the database containing the database schema.
3. Determine the `validation_id` for the new SQL validation. Run the following:

```
SQL> SELECT validation_id
SQL> FROM Knta_validations
SQL> WHERE validation_name like '<validation name>'
```

For example, to find the `validation_id` for the TMG - Work Allocation Work Bench - Work Item New SQL validation, run the following:

```
SQL> SELECT validation_id
SQL> FROM Knta_validations
SQL> WHERE validation_name like 'TMG - Work Allocation
Work Bench - Work Item New'
```

4. Update the `KNTA_VALIDATION_PROFILES` and `KNTA_FIELD_FILTERS` tables to refer to the created validations.

The component names for the work item fields on the respective pages are:

- Work Allocation Page: `WaDfWorkItem`
- Time Sheet Details Page: `TsWwRsWorkItem`

Update the `KNTA_VALIDATION_PROFILES` table by running the following SQL:

For updating the work item component on the Work Allocations page:

```
UPDATE Knta_Validation_Profiles
SET validation_id = <validation id>
WHERE component_name = 'WadfWorkItem'
```

```
UPDATE KNTA_Field_Filters
SET validation_id = <validation id>
WHERE field_filter_id = 30001
```

Where <validation id> is the new **Validation ID**. For updating the work item component on the Time Sheet Details page:

```
UPDATE Knta_Validation_Profiles
SET validation_id = <validation id>
WHERE component_name = 'TsWwRsWorkItem'
```

```
UPDATE KNTA_Field_Filters
SET validation_id = <validation id>
WHERE field_filter_id = 30000
```

Where <validation id> is the new validation ID. The database tables, KNTA_VALIDATION_PROFILES and KNTA_FIELD_FILTERS, now refer to the new validations.

5. Shut down and restart the Mercury IT Governance Server.
6. The Mercury IT Governance Server must be shut down and restarted for the changes to implemented.

Chapter

9

Maintaining Time Management Validations

In This Chapter:

- *Overview of Time Management Validations*
 - *Adding Time Management Validation Values*
 - *Copying Validation Values from Different Validations*
-

Overview of Time Management Validations

Mercury Time Management includes several Time Management validations that can be customized to meet specific business requirements. Validations determine the acceptable input values for fields, such as the acceptable work items to include on a time sheet.

This section lists the customizable Time Management validations. These validations are static validations the application administrator can modify.

- **TMG - Charge Code Categories - Enabled.** The categories of available charge codes. Charge code categories can be used to restrict charge code access. The Mercury-supplied charge code category values are:
 - Billable
 - Non-Billable
- **TMG - Clients - Enabled.** A list of available clients, typically internal or external customers, or both. Client is an attribute of a charge code used to restrict charge code access. The seeded Client values are:
 - Client 1
 - Client 2
- **TMG - Misc. Work Items.** A list of possible miscellaneous and un-trackable work items such as **Vacation** or **Meetings**. The Mercury-supplied Miscellaneous work item values are:
 - Vacations
 - Meetings
 - Other

Adding Time Management Validation Values

To add values to a Time Management validation:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configuration > Validation**.

The Validation Workbench window opens.

3. In the **Query** tab, in Validation Name, enter **TMG** and click **List**.

The **Results** tab lists the entries with the initials, TMG.

4. Select a customizable Time Management validation and click **Open**.

The customizable Time Management Validations are:

- TMG - Charge Code Categories - Enabled
- TMG - Clients - Enabled
- TMG - Misc. Work Items

The Validation window opens with the values of the validation.

Validation: TMG - Misc. Work Items

Name: TMG - Misc. Work Items

Description: TMG - Misc. Work Items

Enabled: Use in Workflow?:

Component Type: Drop Down List

Validated By: List

Seq	Code	Meaning	Description	Enabled	Default
11		Vacation	Vacation	Y	N
22		Meetings	Meetings	Y	N
33		Other	Other	Y	N

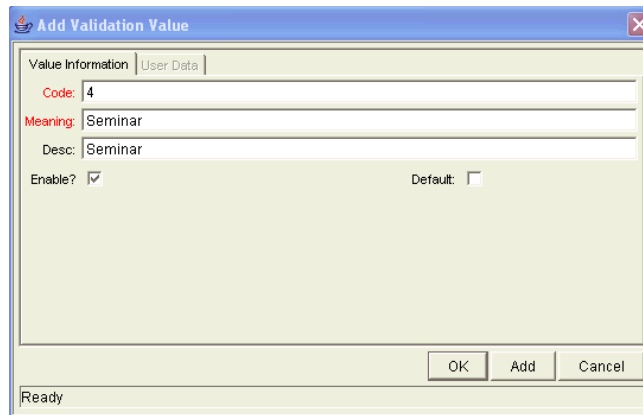
New Edit Delete Copy From ↑ ↓

Used By Ownership OK Save Cancel

Ready (Read-Only, Seed Data)

5. In the Validation window, click **New**.

The Add Validation Value window opens.



6. In the Add Validation Value window, fill in all required fields and any optional fields and click **OK**.

Code field entries must be unique. The new value is added to the validation. The Add Validation Value window closes.

7. In the Validation window, click **OK**.

The changes to the validation are saved.

Copying Validation Values from Different Validations

To copy a validation value from a different validation:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Configurations > Validation**.

The Validation Workbench window opens.

3. In the **Query** tab, in Validation Name, enter **TMG** and click **List**.

The **Results** tab lists the entries with the initials, TMG.

4. Select a customizable Time Management validation and click **Open**.

The customizable Time Management Validations are:

- TMG - Charge Code Categories - Enabled
- TMG - Clients - Enabled
- TMG - Misc. Work Items

The Validation window opens with the values of the validation.

Validation: TMG - Misc. Work Items

Name: TMG - Misc. Work Items

Description: TMG - Misc. Work Items

Enabled: Use in Workflow?:

Component Type: Drop Down List

Validated By: List

Seq	Code	Meaning	Description	Enabled	Default
11		Vacation	Vacation	Y	N
22		Meetings	Meetings	Y	N
33		Other	Other	Y	N

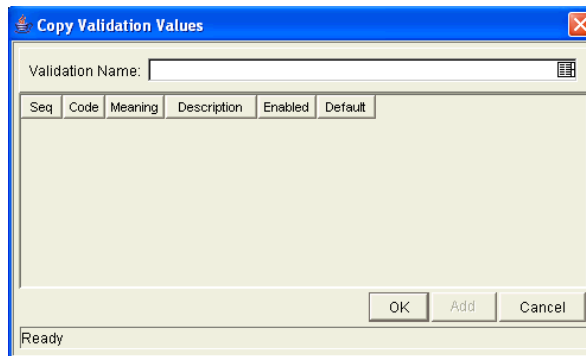
New Edit Delete Copy From ↑ ↓

Used By Ownership OK Save Cancel

Ready (Read-Only, Seed Data)

5. In the Validation window, click **Copy From**.

The Copy Validation Value window opens.



6. In the Validation Name field, select the validation containing the validation value to be copied.

The Copy Validation Value window is populated with the values from the selected validation.

7. In the Copy Validation Value window, select the value to copy and click **OK**.

Code field entries must be unique. The selected validation value is copied to the Validation window and the Copy Validation window closes.

8. In the Validation window, click **OK**.

The changes to the validation are saved.

Chapter

10

Integrating Mercury Time Management with Mercury Project Management

In This Chapter:

- *Overview of Integrating Time Management and Project Management*
 - *Integrating Time Management and Project Management*
-

Overview of Integrating Time Management and Project Management

This chapter details procedures to integrate Mercury Time Management with Mercury Project Management. Integrating Time Management and Project Management allows actual time (and associated costs) entered on time sheets to automatically update the Actual Effort fields and Task Actual Costs fields of projects.

For example, if Time Management is not integrated with Project Management, Actual Effort (time) spent on a project is manually entered on the Task Details page. The Actual Effort (time) then appears on the Project Details page. However, when Time Management is integrated with Project Management, actual time is entered on a time sheet, which automatically updates the Project Details page. *Figure 10-1* shows the Project Details page with a Task Details page and the time sheet.

When integrating Time Management with Project Management, the following functionality applies:

- Updates to Actual Effort from Time Management overwrite any updates to Actual Effort made in Project Management.
- Updates to Actual Effort and Actual Cost from Project Management do not update Time Management time sheets.
- Actual Effort and Actual Cost fields are updated every time a time sheet is saved and a change in the Actual Effort or Actual Cost is detected. If the Project can't be locked for editing, the time sheet does not save the data and an error message appears.
- CPI and SPI can automatically be rolled up from Project Management.



Integrating Time Management and Mercury Project Management is performed on a project-by-project basis.

Time Sheet Details (All Times are in Hours)

Work Item Type	Work Item	Work Item Set	Work Item Description	Current Budget	Actuals To Date	Details	Period Total
<input type="checkbox"/>	Task	Run Test Script	Mltg Demo Alpha Test Phase > Run Test Script	0.0	40.0		40

Remove Lines Reset to Saved New Lines: Add Totals: 40

MERCURY IT Governance Center Time Sheet #30122 > Project Search > Search Results > Mltg Demo Alpha Test Phase > Mltg Demo Alpha Test Phase Details SIGN OUT

Project Details

Project Name: Mltg Demo Alpha Test Phase Project Manager: Jane Smith Project State: Active
 Budget: Mltg Demo Alpha Resource: Jane Smith

Expand All Collapse All

Progress

% Complete: 39

Start Date	Finish Date	Duration	Effort
Scheduled: October 11, 2004	Scheduled: November 1, 2004	Scheduled: 16.0 days	Scheduled: 136.0 hours Actual: 54.0 hours

MERCURY Close Window X

Task Details Save Reset

Task Name: Run Test Script Task State: In Progress

Resource: Jane Smith

Project Path: Mltg Demo Alpha Test Phase > Run Test Script

Expand All Collapse All

Exceptions (1 Exception Exists)

Progress

% Complete:

Start Date	Finish Date	Duration	Effort
Scheduled: October 18, 2004	Scheduled: November 1, 2004	Scheduled: 11.0 days	Scheduled: 88.0 hours Actual: 40.0 hours

Figure 10-1. A time sheet updating the Project Details page

Integrating Time Management and Project Management

To integrate Time Management and Project Management:

1. Open the Workbench.

For information on how to open the Workbench, see the *Getting Started* guide. The Workbench opens.

2. From the shortcut bar, select **Project Mgmt > Projects**.

The Project Workbench opens.

3. In the **Query** tab of the Projects Workbench, enter the search criteria and click **List**.

The **Results** tab opens, displaying the results of the search. To display all projects, click **List** without entering search criteria.

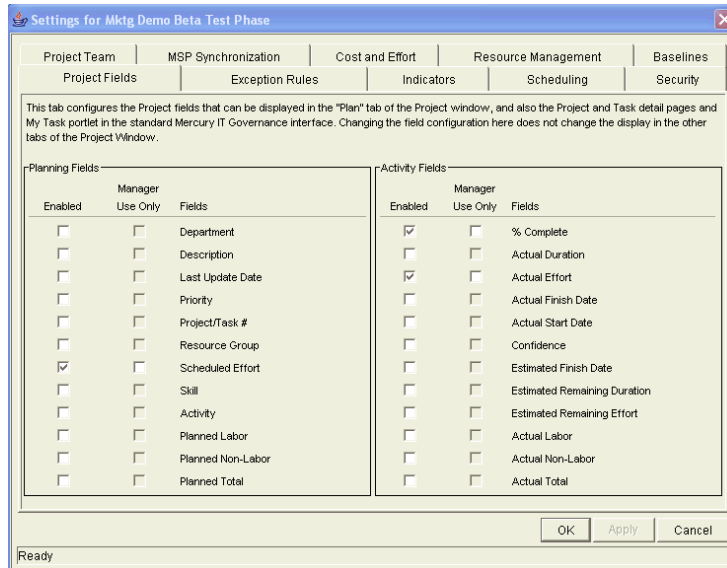
4. From the **Results** tab or the Project Workbench, select a project and click **Open**.

The Project window opens.

5. On the toolbar, click **Project > Settings**.

The Settings window opens.

6. In the Settings window, verify Scheduled Effort and Actual Effort are selected.



7. In the Project window, click the **Time Management** tab.

8. Select the following fields to be updated automatically by time sheets:

- Actual Effort, if the actual time is to be updated by Time Management.
- Actual Costs, if the actual cost is to be updated by Time Management.



If Cost Management is not enabled for the project, the actual cost option is not selectable.

9. In the **Time Management** tab, click **OK**.

The changes to the **Time Management** tab are saved. The Project window is displayed.

10. In the Project window, click **OK**.

The changes to the project are saved.

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