Mercury IT Governance Center™

Mercury Time Management™

User's Guide

Version: 6.0

MERCURY™

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Chapter 1 Introduction

In This Chapter:

About This Document

Mercury Time Management™ is a Mercury IT Governance Center™ product that 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

In addition, you can 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. For more information concerning the integration of Mercury Time Management and Mercury Project Management, see the *Mercury Time Management Configuration Guide*.

This guide contains the following chapters:

- Chapter 1, *Introduction*, on page 9

  This chapter provides an overview of this guide and of Mercury Time Management.

- Chapter 2, *Configuring Work Allocations*, on page 21

  Work allocations specify the amount of time to be spent on work items. Work allocations allow managers and planners to assign a specific amount of time to any given task. This chapter details how to create, edit, cancel, and delete work allocations.

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  Time sheets 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. This chapter details how to create, cancel, and release time sheets.

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  Once a time sheet is released, other individuals need to review and approve the time sheet. If approved, time sheets move forward towards the final steps in the process. If rejected, the time sheet goes back to the original resource for updating or additional justification. This chapter details how to review and approve time sheets.

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  After a time sheet is approved, it is then frozen. This allows actual reporting on the time sheet's information or extracting the information for a billing or financial system. Once sufficient time has passed as frozen, a time sheet can be closed. This chapter details how to freeze and close time sheets.

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  This appendix lists the Time Management portlets.

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  This appendix lists the Time Management reports.

Who Should Read This Document

This guide is for the following audience types:

- End users

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 Change Management User's Guide*
- *Mercury Demand Management User's Guide*
- *Mercury Financial Management User's Guide*
- *Mercury Portfolio Management User's Guide*
- *Mercury Program Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Resource Management User's Guide*
- *Mercury Time Management Configuration Guide*

For More Information

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

Overview of Time Management Process

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

The Time Management process includes:

- Step One: *Entering Work Allocations*.

  This step is optional. Managers or planners budget time for a specific work item.

- Step Two: *Entering Time Sheet Information*.

  Resources enter and update actual time on a time sheet. Time sheets are **Released** or **Cancelled.**

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

- Step Three: *Approving Time Sheets*.

  Released time sheets are reviewed. A reviewed time sheet is then **Rejected** (returned to the resource) or **Approved.**

- Step Four: *Freezing Time Sheets*.

  Approved time sheets are **Frozen.** Freezing a time sheet allows for data extraction and for reporting to begin.

- Step Five: *Billing or Charging with Third-Party Application*.

  This step is optional. Extracted data can be sent to third-party financial applications.

- Step Six: *Closing Time Sheets*.

  Once a time sheet is **Frozen,** data is extracted and other external activities completed, the time sheet is closed and final reports can be generated.

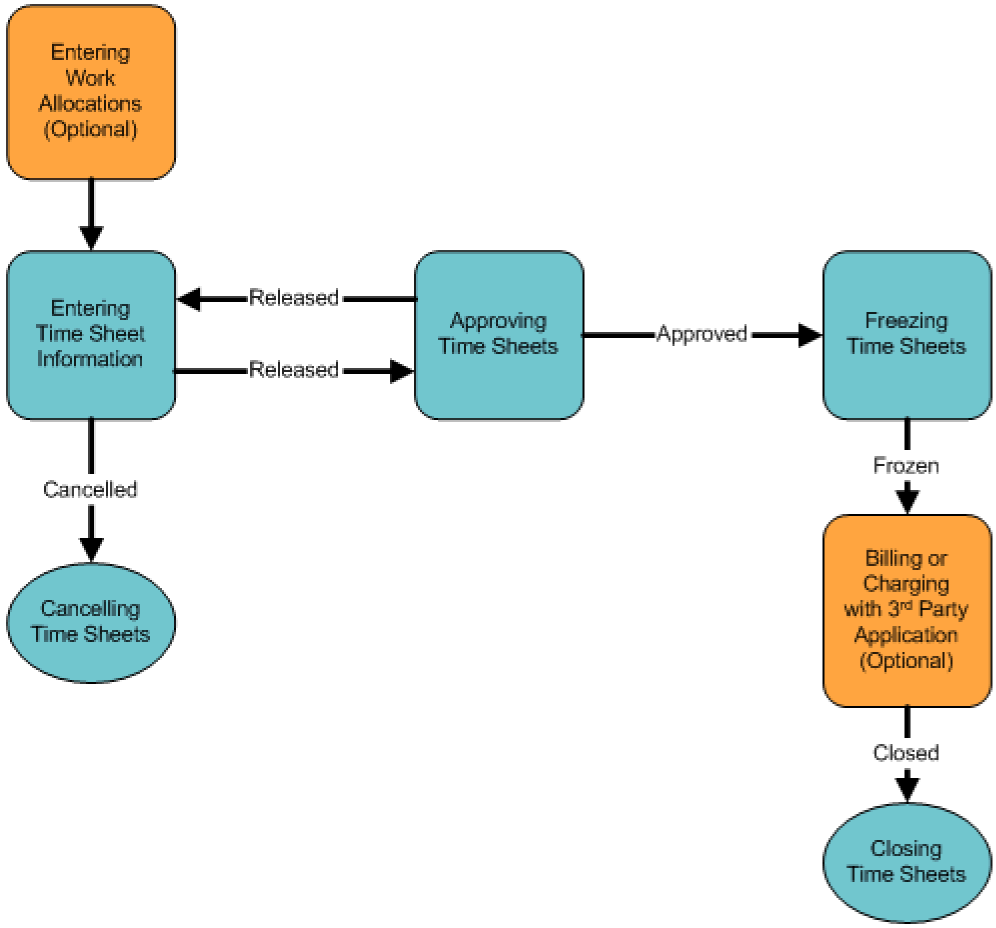


Figure 1-1. Time Management process overview

Entering Work Allocations

Managers or planners can create work allocations. Work allocations specify the amount of time or budget 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. The use of work allocations is optional and is based on functional requirements. See Chapter 2, *Configuring Work Allocations*, on page 21 for more information.

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 Chapter 3, *Creating and Releasing Time Sheets,* on page 33 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 Chapter 3, *Releasing, Reactivating, and Cancelling Time Sheets,* on page 45 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 Chapter 4, *Reviewing and Approving Time Sheets,* on page 53 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 Chapter 5, *Freezing and Closing Time Sheets,* on page 61 for more information.

Billing or Charging with Third-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 Chapter 5, *Freezing and Closing Time Sheets,* on page 61 for more information.

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 1-2* displays the **Time** menu.

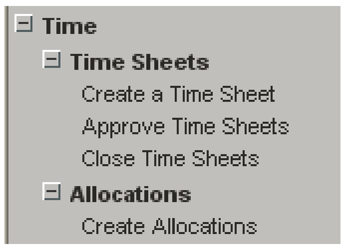


Figure 1-2. Time menu

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.

Time Management Filters Overview

Many of the Time Management standard interface pages use work items. On time sheets, users charge their time to work items. A work item can be any of the following:

- A request in Mercury Demand Management™
- A package in Mercury Change Management™
- A task, project, or subproject in Mercury Project Management
- A miscellaneous item in Mercury Time Management, such as meetings and vacations

Work items typically require significant time and effort, involve one or more resources and usually span multiple process steps, such as a project. For example, a work item might be adding functionality to software. From a project viewpoint, this might include the following tasks:

- Initial design
- Design review
- Design signoff
- Coding
- Code review
- Unit testing
- Pre-production testing
- Production testing
- Release

The task of selecting a work item occurs when you are configuring work allocations (Create Work Allocations page) and creating and editing a time sheet (Enter Time page). When the list of work items becomes too long, you can specify filtering criteria for work items using the Work Item Filters section. *Figure 1-3* shows the Work Items Filters section for the Create Work Allocations page. Filter sections are divided into the following sections:

- **General Filters.** General filters are non-task–specific filters. *Table 1-1* lists the general filters.

Table 1-1. General filters

Field	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.
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 1-2* lists the request filters.

Table 1-2. Request filters

Field	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 1-3* lists the package filters.

Table 1-3. Package filters

Field	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 1-4* lists the project filters.

Table 1-4. Project filters

Field	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.

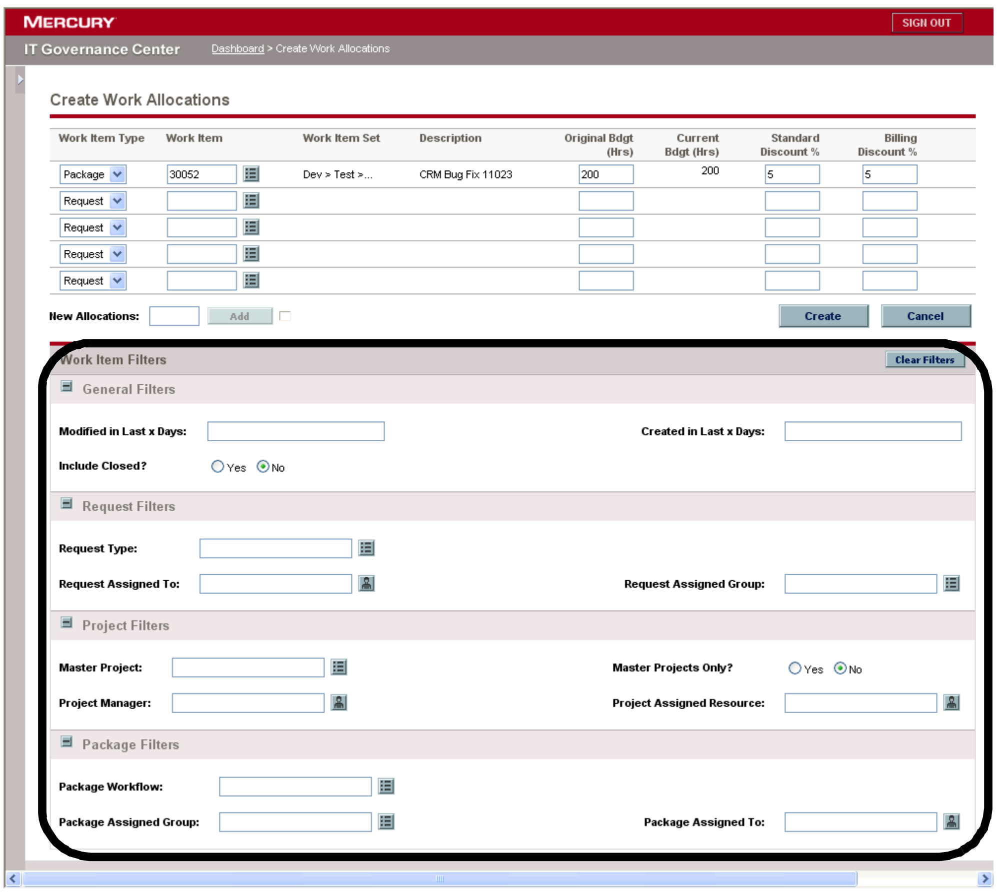


Figure 1-3. Work item filters

For More Information

For more information concerning the Mercury Time Management filters and how to modify the Time Management filters, see the *Time Management Configuration Guide*.

Chapter

2

Configuring Work Allocations

In This Chapter:

Overview of Work Allocations

Work allocations specify the amount of time that can be spent on a work item. Work allocations are created by managers and planners to set a specific amount of time against any given work item.

On time sheets, users charge their time to work items. A work item can be any of the following:

- A request in Mercury Demand Management
- A package in Mercury Change Management
- A task, project, or subproject in Mercury Project Management
- A miscellaneous item in Mercury Time Management, such as meetings and vacations

Work items typically require significant time and effort, involve one or more resources and usually span multiple process steps, such as a project. For example, a work item might be adding functionality to software. From a project viewpoint, this might include the following tasks:

- Initial design
- Design review
- Design signoff
- Coding
- Code review
- Unit testing
- Preproduction testing
- Production testing
- Release

In this scenario, you could track time at the project level, as well as at a more granular (task) level.

Time Management Process

This chapter details the procedures associated with Entering Work Allocations. Entering Work Allocations is an optional step in the Time Management process.

Work allocations are created by managers and planners to set a specific amount of time against any given work item. The following actions are associated with Entering Work Allocations.

- Create a work allocation.
- Save a work allocation to work on at a later date.
- Close a work allocation. You can close work allocations you created. To close work allocations not created by you, you must have the Time Mgmt: Manage Work Allocations access grant.
- Delete a work allocation. You can delete work allocations you created. To delete work allocations not created by you, you must have the Time Mgmt: Manage Work Allocations access grant. Work allocations that have time logged against them cannot be deleted.

Creating Work Allocations

Work allocations are created for specific work items. Before creating a work allocation, the work item must exist.

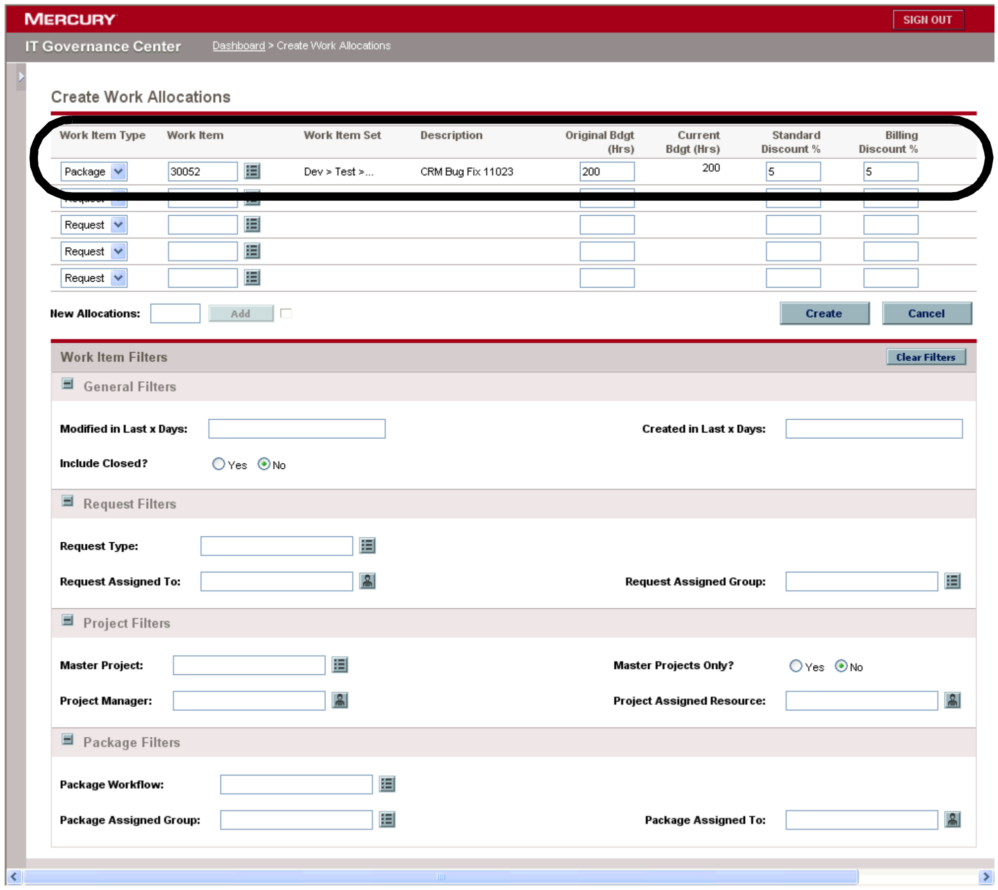
To create a new work allocation:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Create > Allocations.**

   You can also select **Time > Allocations > Create Allocations.** The Create Work Allocations page appears.



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

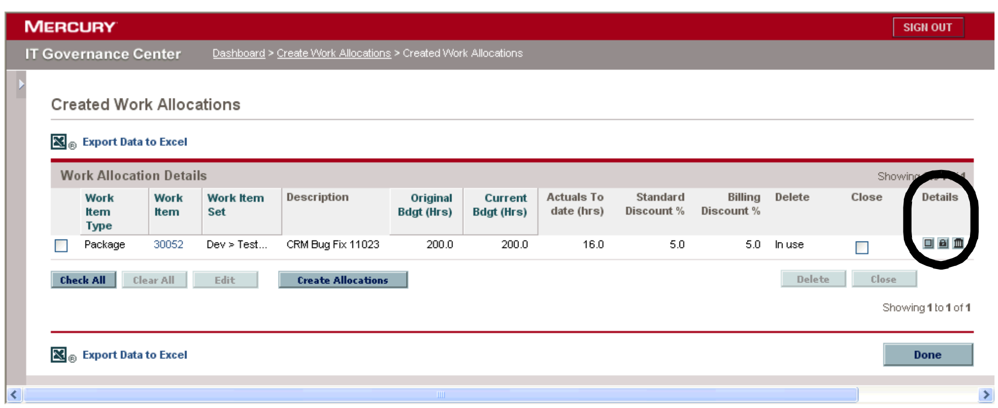
   Initially, five rows exist in the Work Allocation Details section. If the number of rows in insufficient, enter the number of additional lines required in the New Allocations field and click **Add.** This adds the specified number of rows to the section.

4. In the Work Allocation Details section, complete the fields as specified in the following table and click **Create.**

Field	Description
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.
Work Item	The name or number of the work item type. • For requests a request number. • For packages a package number. • For tasks a task name. • For projects a project name. • For miscellaneous a validation from Time Management, such as vacation, meeting, seminar, training, and so forth.
Work Item Set	**Work Item Set.** The 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.
Original Bdgt (Hrs)	Enter the amount of time in hours in Original Bdgt field. Enter a whole number or tenths of an hour. The following information-only fields are automatically updated based on selections in the Original Bdgt field.

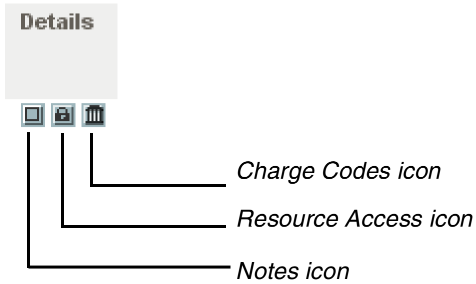
Field	Description
Current Bdgt (Hrs)	Automatically updated based on the value provided in Original Bdgt. During the life cycle of this allocation, make any changes to the budgeted time needed for the work item in Current Bdgt. Changes to Original Bdgt, which gives visibility to changes in budget from initiation, are restricted because it's an important metric when examining planning and estimation accuracy.
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).
Billing Discount %	Cost overruns sometimes require charges to be renegotiated. 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.

The work allocation is created and the Created Work Allocations page appears.

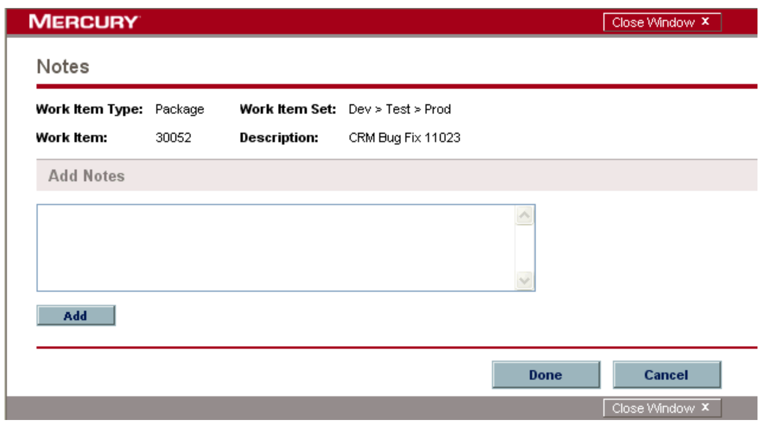


5. In the Details Column, enter any additional information.

   Enter detailed information regarding the new work allocation by clicking the available icons. The following lists the available icons:



- **Notes.** The **Notes** icon displays the Work Allocation Notes page. Enter information in the text area and click **Add** for each new note. Click **Done** to save all of the notes. Click **Close Window to** close the Work Allocation Notes page.



- **Resource Access.** The **Resource Access** icon displays the Work Allocation Resource Access Information page. Using this page assigns specific resources to a work allocation. Other users will be restricted from using the associated work items. To set specific resources to a work allocation:

  i. In the Details Column, click the **Resource Access** icon to open the Work Allocation Resource Access Information page.

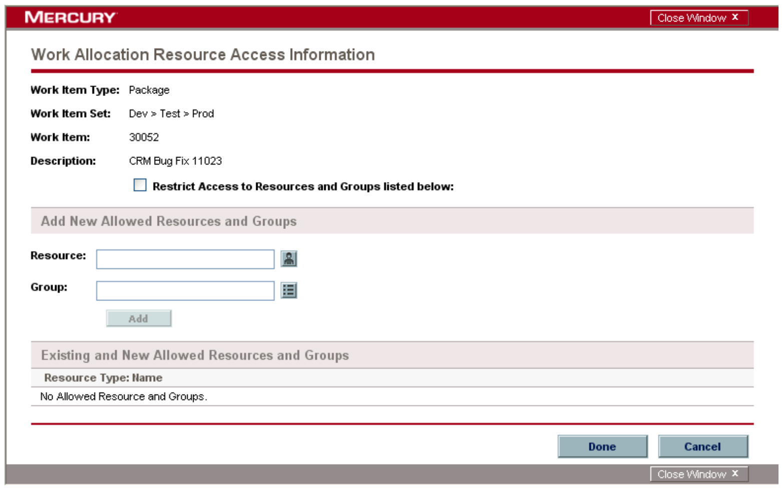
  ii. In the Work Allocation Resource Access Information page, select Restrict Access to Resources and Groups listed below.

  iii. In the Work Allocation Resource Access Information page, select resources from the Resource auto-complete list and click **Add.**

iv. In the Work Allocation Resource Access Information page, select resource groups from the Group auto-complete list and click **Add.**

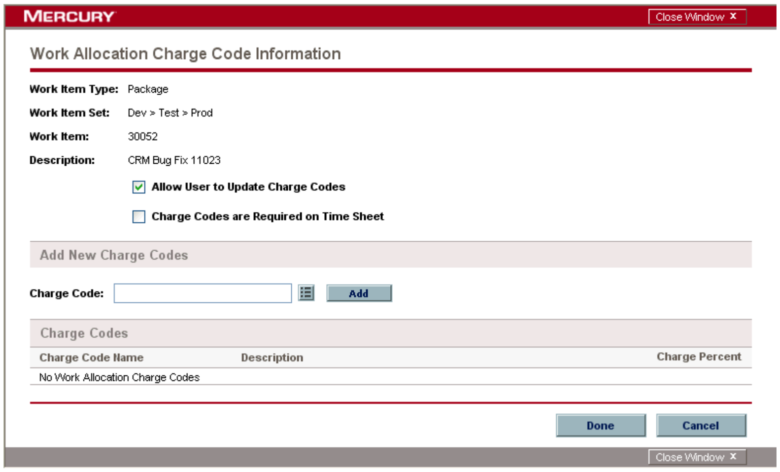
v. In the Work Allocation Resource Access Information page, click **Done** to save the selection.

vi. In the Work Allocation Resource Access Information page, click **Close Window** to close the window.



- **Charge Codes.** The **Charge Codes** icon displays 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. Charge codes are applied to work items when time sheets are created.

  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 **Done** to save the selection. Click **Close Window** to close the window. Assigning charge codes requires permission. You must be in a security group that allows access to all charge codes or the specific charge codes.



6. On the Created Work Allocations page, click **Done.**

   The additional information is added to the work allocation.

Updating, Closing, and Deleting Existing Work Allocations

You can delete work allocations you created. To delete work allocations not created by you, you must have the Time Mgmt: Manage Work Allocations access grant. Work allocations that have time logged against them can not be deleted.

You can close work allocations you created. To close work allocations not created by you, you must have the Time Mgmt: Manage Work Allocations access grant. Work allocations that have time logged against them can not be deleted.

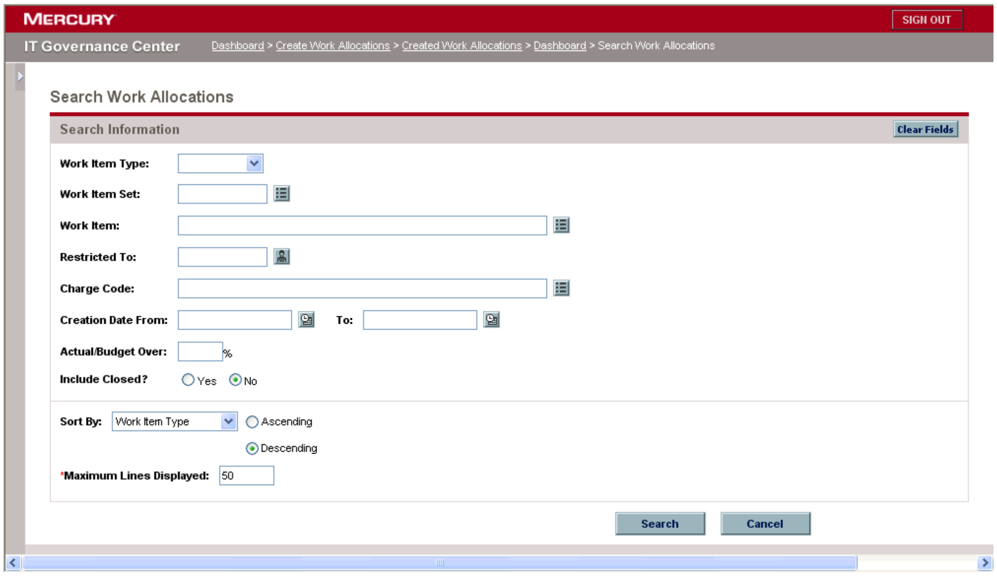
To update an existing work allocation:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

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

   The Search Work Allocations page appears.

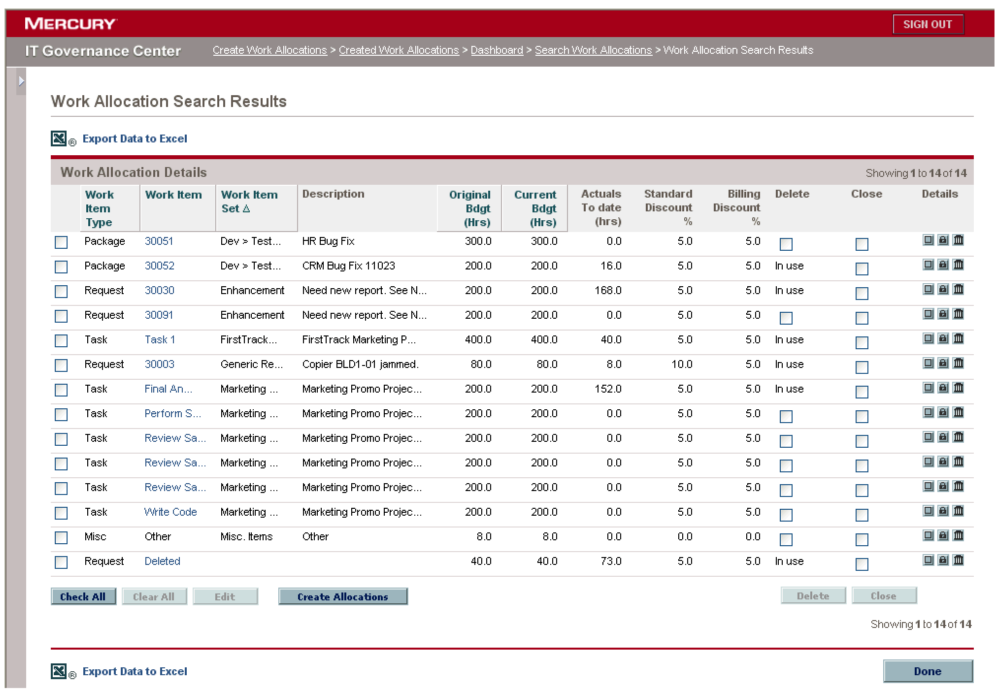


3. In the Search Work Allocations page, enter the search criteria specified in the following table and click **Search.**

Field	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.

Field	Description
Sort By	The parameter to sort the returned items. The sort parameters are: • Work Item Type • Work Item Set • Work Item • Original Budget (Hrs) • Current Budget (Hrs)
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.

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



4. Update, close, or delete the work allocation.

- To update the work allocation:

a. On the Work Allocation Search Results page, select the work item's checkbox and click **Edit.**

To update all of the displayed work allocations, click **Check All.** All of the listed work allocations are selected. The Edit Work Allocations page appears.

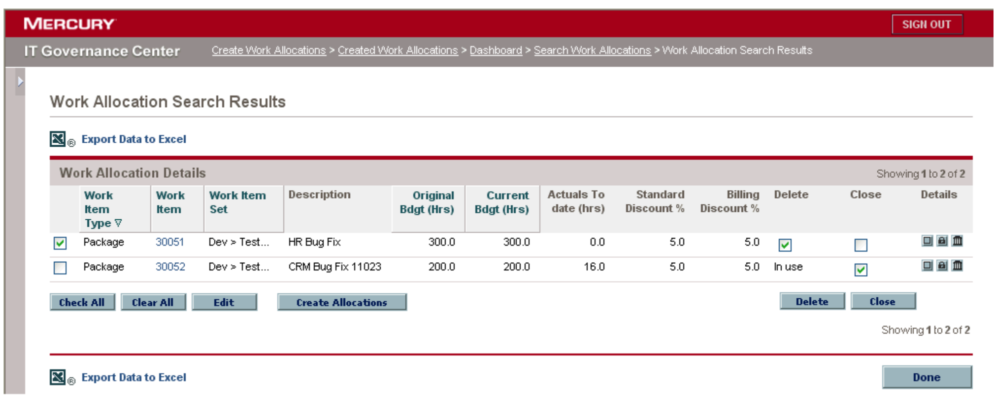
b. On the Edit Work Allocations page, update the work allocations.

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

- To delete the work allocation, on the Edit Work Allocations page, select the work allocation using the Delete column checkbox and click **Delete.**

  The work allocation is deleted.

- To close the work allocation: on the Edit Work Allocations page, select the work allocation in the Close column checkbox and click **Close.**



The work allocation is closed.

5. On the Edit Work Allocations page, click **Done.**

The updates to the work allocation are saved.

Chapter

3

Creating and Releasing Time Sheets

In This Chapter:

Overview of Creating Time Sheets

Time sheets are a basic entity in Mercury Time Management systems. Time sheets are the compilation of the time your worked on one or more work items for a specific period of time. Optionally, you can also select what type of activity you performed for the work item, such as coding or writing test scripts.

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.

Time Management Process

This chapter details the procedures associated with Entering Time Sheet Information. Individual users create and update time sheets. Each user specifies 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. The following actions are associated with Entering Time Sheet Information.

- Create a time sheet. Created time sheets have a status of **Active.**
- Save a time sheet to work on at a later date. A time sheet that is created and saved has a status of **Active.**
- Save a rejected time sheet. Saving a rejected time sheet has a status of **Active.**
- Release a time sheet so that it can be reviewed, approved, or rejected by your manager or reviewer. A released time sheet has a status of **Released.**
- Reactivate a released time sheet to make additional changes to the time sheet. Reactivating a released time sheet changes the time sheet's status back to **Active.**
- Cancel a time sheet to delete a time sheet. Cancelling a time sheet cannot be reversed. However, once a time sheet is cancelled, a new time sheet can be created in its place.

Time Sheet Policies

Everyone who fills out a time sheet has an assigned time sheet policy. Time sheet policies set the rules for a specific group of users using time sheets. These rules include the following:

- The period type. Period types specify the different types of intervals for which time sheets record information, such as weekly or monthly.
- The way time is entered. Time can be entered as hours or as a percentage, and on a daily or period basis.
- If more than one time sheet per time period is allowed.
- If emails are sent to users with delinquent time sheets.
- The minimum and maximum hours that can be worked.
- The enforcement level of the time sheet policy.
- The default charge codes for the time sheet policy.

For example, if you are not allowed to submit more than one time sheet per time period, you might encounter an error as shown in *Figure 3-1*.

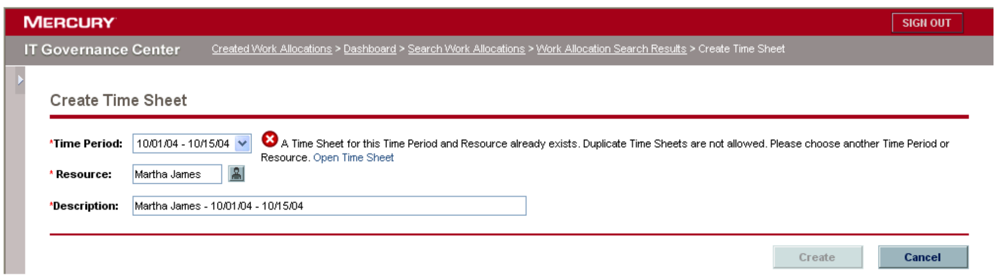


Figure 3-1. Create Time Sheet warning

As another example, if you fail to meet the minimum or maximum hours for a time sheet, you might encounter an error when releasing the time sheet (see *Figure 3-2*).

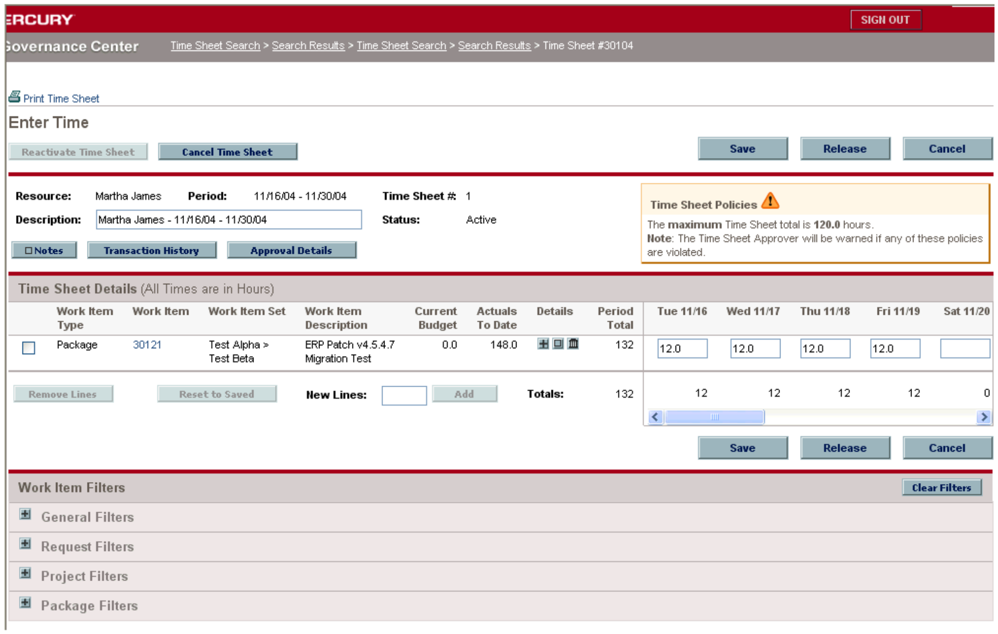


Figure 3-2. Enter Time warning

Creating Time Sheets

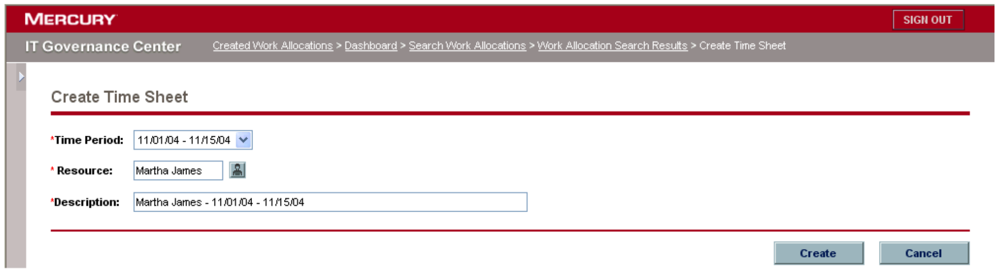
To create a new time sheet:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Time > Time Sheets > Create a Time Sheet.**

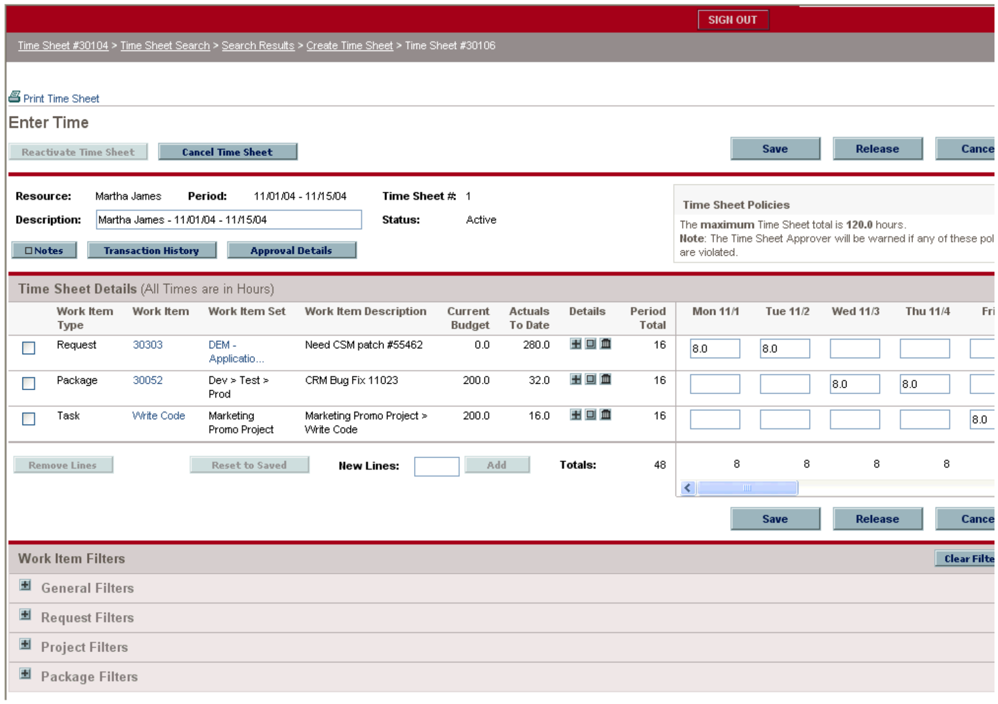
   You can also select **Create > Time Sheet.** The Create Time Sheet page appears.



3. On the Create Time Sheet page, complete the fields as specified in the following table and click **Create.**

Field	Description
Time Period	The time period for the new time sheet. The default is the current time period. If you have already created a time sheet for the listed time period, an error might display (see *Figure 3-1*).
Resource	The default is your username. If you have the delegated authority to create another user's time sheets, you can select the user's name from the drop-down list.
Description	A description of the time sheet. This is a combination of the name of the resource and the time period.

The time sheet is created. The Enter Time page appears.



4. On the Enter Time page, 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.

   a. On the Enter Time page, navigate to a blank row at the top of the Time Sheet Details section.

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

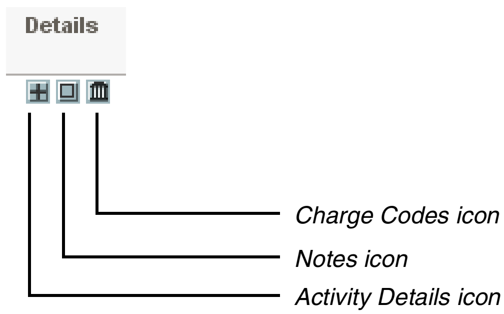
   b. In the blank row of the Time Sheet Details section, complete the fields as specified in the following table.

Field	Description
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.
Work Item	Selects a work item from the Work Item auto-complete list. 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 *Time Management Filters Overview* on page 17.
Work Item Set	Information-only column. 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	Information-only column. 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.

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.

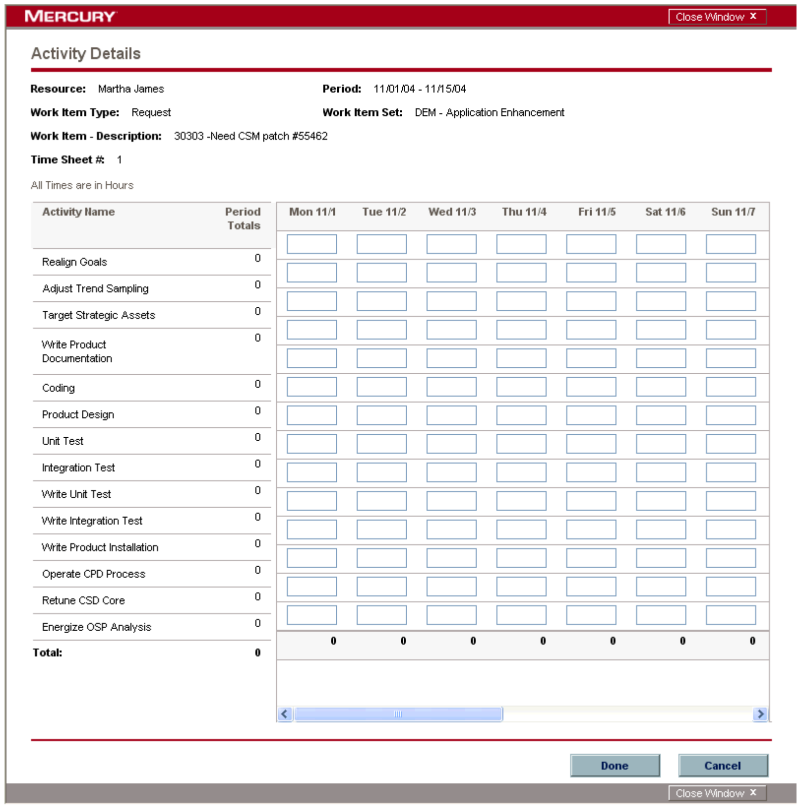
5. Enter any additional details in the Details column.

   Detailed information regarding the new work allocation can be entered by clicking the available icons.

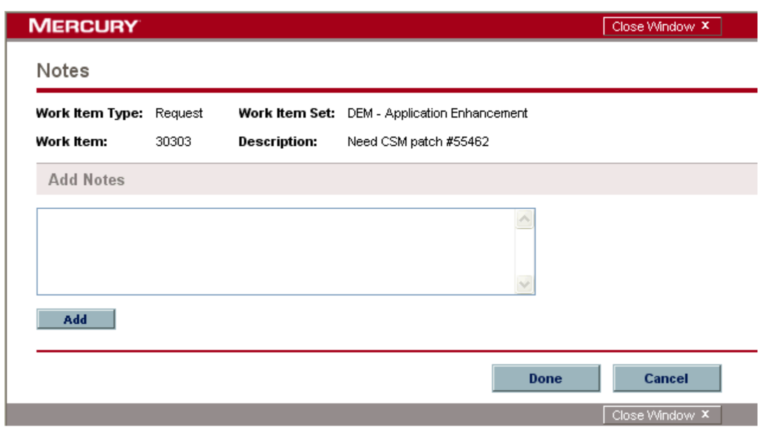


- **Activity Details.** The **Activity Details** icon displays the Activity Details page. Daily time worked can be entered into pre-defined Activities, such as “Writing Test Plans” and “Test Execution.” This can be useful for activity reporting and future estimation of work.

  To add 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. 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.

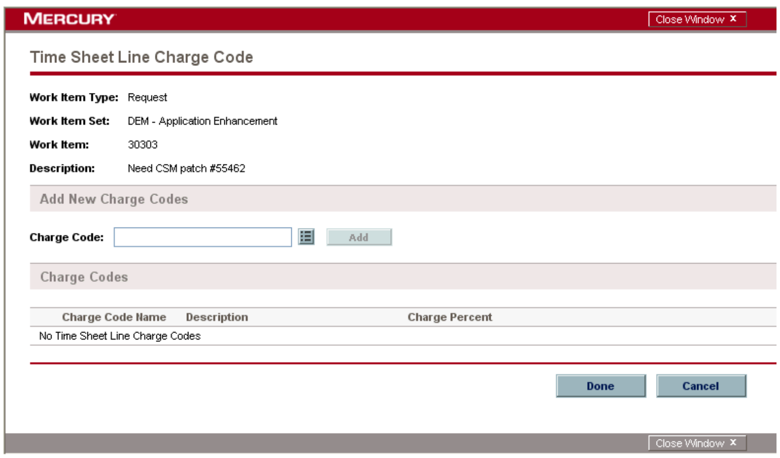


- **Notes.** The **Notes** icon displays the Time Sheet Line Notes page. The Time Sheet Line Notes page adds free form notes to the time sheet line. Enter information in the text area. Click **Add** for each new note. Click **Done** to close the Time Sheet Line Notes page.



- **Charge Codes.** The **Charge Codes** icon displays 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.



6. On the Enter Time page, click **Save.**

   The new time sheet is saved.

Editing Time Sheets

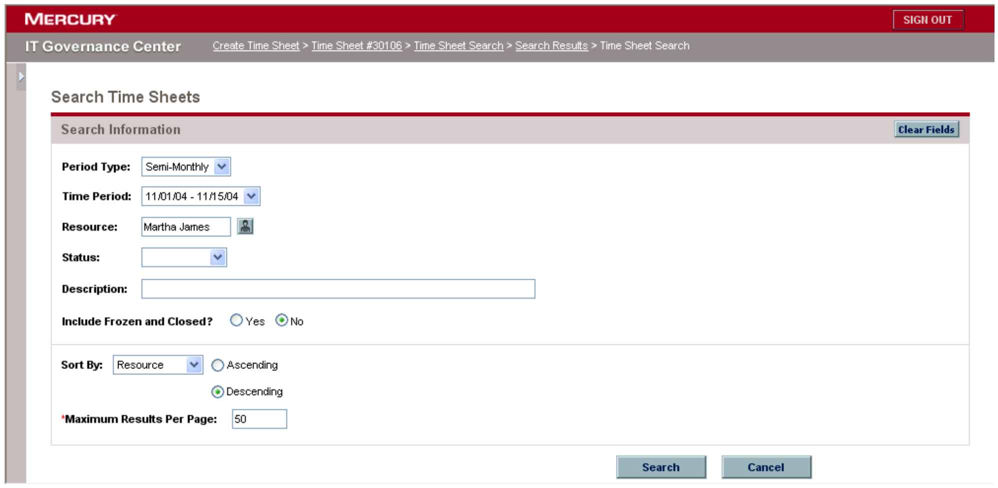
To edit a time sheet:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Search > Time Sheets.**

   The Search Time Sheets page appears.

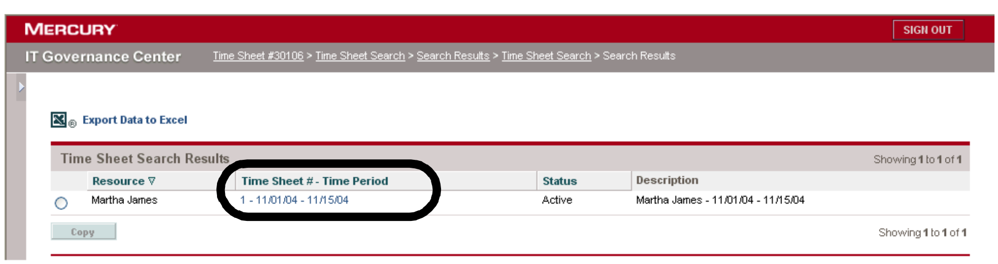


3. On the Search Time Sheets page, enter the search criteria as specified in the following table and click **Search.**

Field	Description
Period Type	Selects the type of time period from the drop-down list. The following lists all of the possible settings: • Weekly • Bi-Weekly • Semi-Monthly • Monthly
Time Period	Selects the time period from the drop-down list. An example of a semi-monthly time period is **09/01/04 – 09/15/04.**
Resource	Selects one or more resources from the auto-complete list.

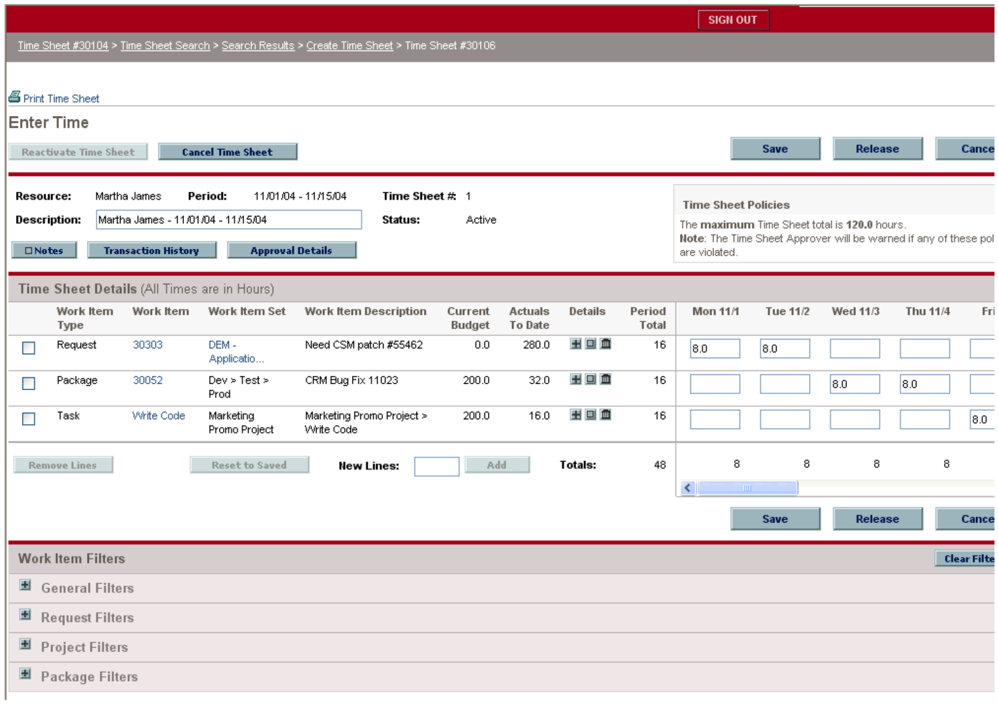
Field	Description
Status	Selects the status of the time sheet or sheets from the drop-down list. The following lists all of the possible time sheet statuses: • Active • Released • Approved • Frozen • Closed • Cancelled • Rejected
Description	Enter a specific text string to search for time sheet or sheets.
Include Frozen and Closed?	Select **Yes** to include frozen and closed time sheets in the search.
Sort By	The parameter to sort the returned items. The sort parameters are: • Resource Work Item Set • Time Period • Status • Time Sheet No
Ascending/ Descending	Display the results in ascending or descending order.
Maximum Results per Page	Set the maximum number of results to display in the portlet. The default is 50.

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



4. On the Time Sheet Search Results page, click Time Sheet # - Time Period.

   The Enter Time page appears.



5. On the Enter Time page, update the time sheet and click **Save.**

   The changes to the time sheet are saved. For information concerning the Enter Time page fields, see *Creating Time Sheets* on page 36.

Releasing, Reactivating, and Cancelling Time Sheets

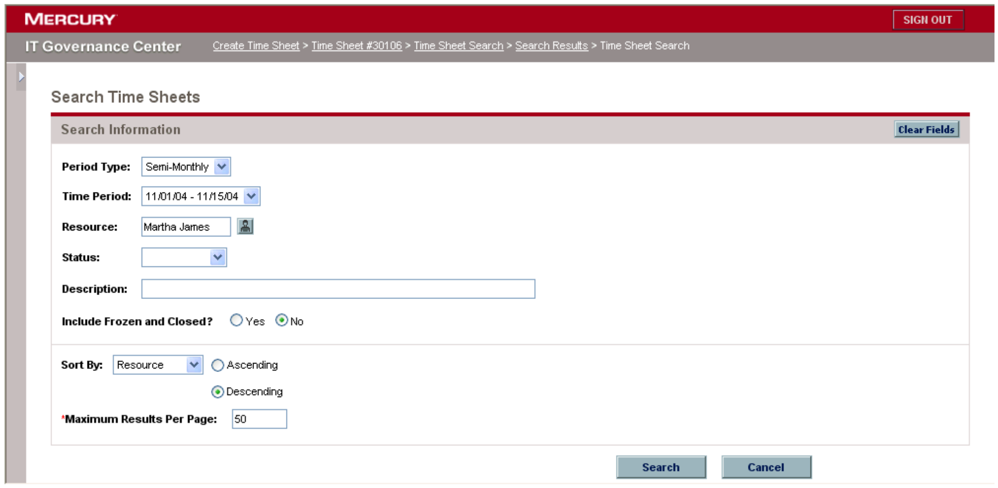
To release, reactivate, or cancel a time sheet:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Search > Time Sheets.**

   The Search Time Sheets page appears.

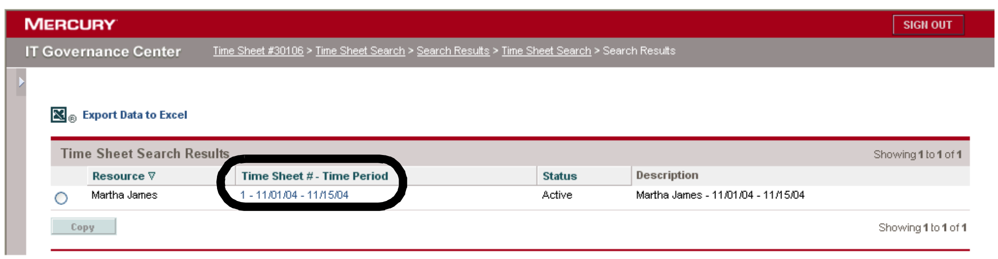


3. On the Search Time Sheets page, enter the search criteria as specified in the following table and click **Search.**

Field	Description
Period Type	Selects the type of time period from the drop-down list. The following lists all of the possible settings: • Weekly • Bi-Weekly • Semi-Monthly • Monthly
Time Period	Selects the time period from the drop-down list. An example of a semi-monthly time period is **09/01/04 – 09/15/04.**
Resource	Select one or more resources from the auto-complete list.
Status	Selects the status of the time sheet or sheets from the drop-down list. The following lists all of the possible time sheet statuses: • Active • Released • Approved • Frozen • Closed • Cancelled • Rejected

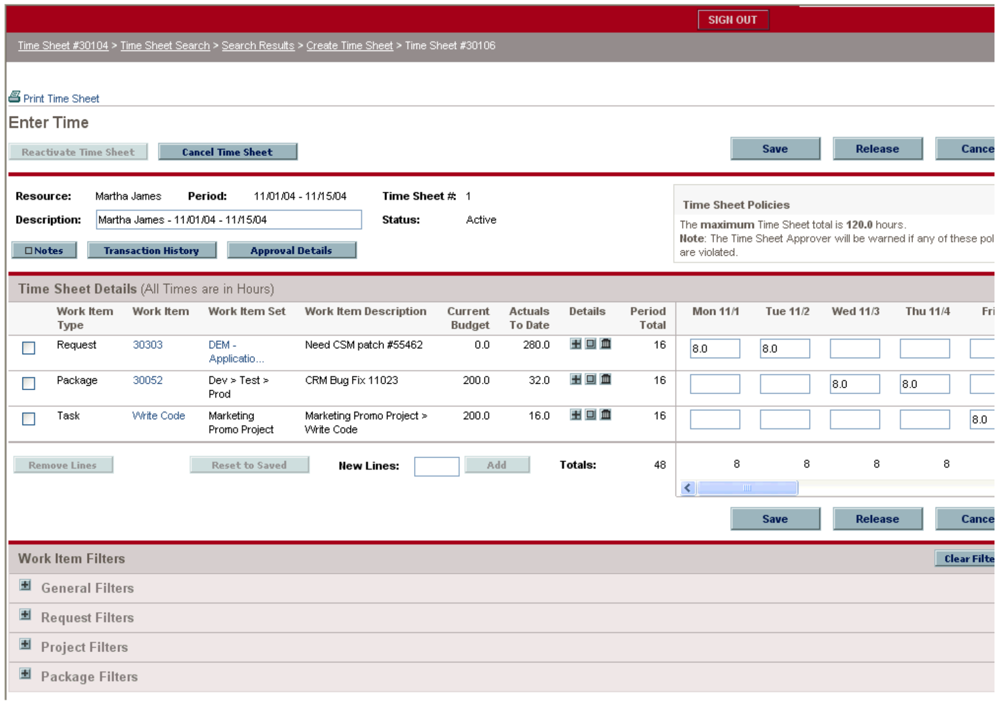
Field	Description
Description	Enter a specific text string to search for time sheet or sheets.
Include Frozen and Closed?	Select **Yes** to include frozen and closed time sheets in the search.
Sort By	The parameter to sort the returned items. The sort parameters are: • Resource Work Item Set • Time Period • Status • Time Sheet No
Ascending/ Descending	Display the results in ascending or descending order.
Maximum Results per Page	Set the maximum number of results to display in the portlet. The default is 50.

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



4. On the Time Sheet Search Results page, click Time Sheet # - Time Period.

The Enter Time page appears.



5. Release, reactivate, or cancel the time sheet:

- To release a time sheet, on the Enter Time page, click **Release.** The time sheet's status is set to **Released.**
- To reactivate a time sheet, on the Enter Time page, click **Reactivate Time Sheet.** The time sheet's status is set to **Active.**
- To cancel a time sheet, on the Enter Time page, click **Cancel Time Sheet.** The time sheet's status is set to **Cancelled.**

6. On the Enter Time page, click **Done.**

   The changes to the time sheet are saved.

Printing Time Sheets

A printable version of the Enter Time page is available.

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.

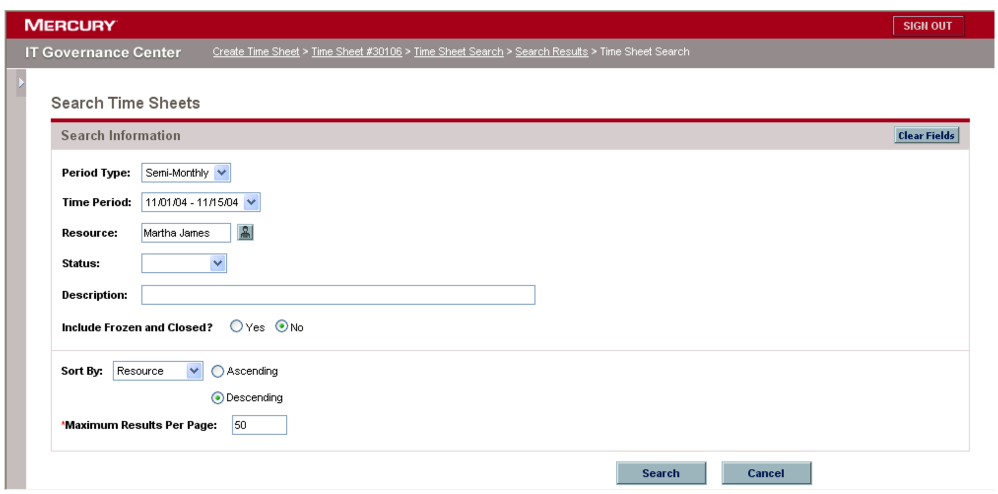
To print a time sheet page:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Search > Time Sheets.**

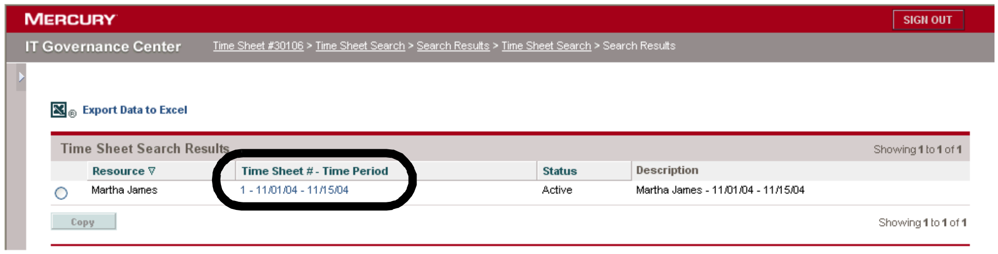
   The Search Time Sheets page appears.



3. On the Search Time Sheets page, enter the search criteria as specified in the following table and click **Search.**

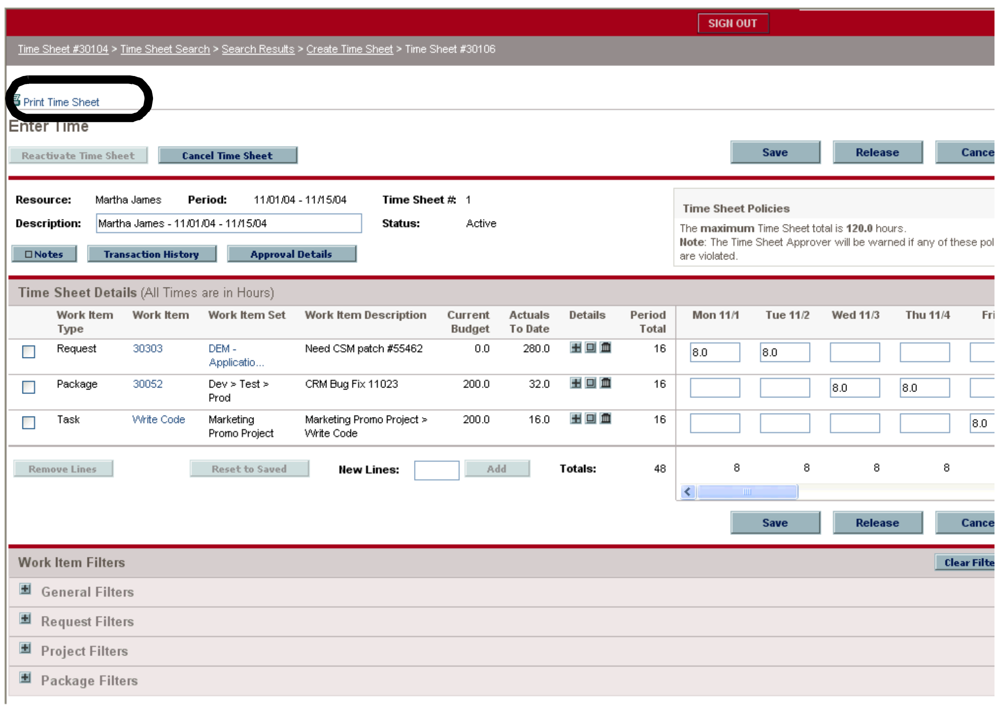
Field	Description
Period Type	Selects the type of time period from the drop-down list. The following lists all of the possible settings: • Weekly • Bi-Weekly • Semi-Monthly • Monthly
Time Period	Selects the time period from the drop-down list. An example of a semi-monthly time period is **09/01/04 – 09/15/04.**
Resource	Selects one or more resources from the auto-complete list.
Status	Selects the status of the time sheet or sheets from the drop-down list. The following lists all of the possible time sheet statuses: • Active • Released • Approved • Frozen • Closed • Cancelled • Rejected
Description	Enter a specific text string to search for time sheet or sheets.
Include Frozen and Closed?	Select **Yes** to include frozen and closed time sheets in the search.
Sort By	The parameter to sort the returned items. The sort parameters are: • Resource Work Item Set • Time Period • Status • Time Sheet No
Ascending/ Descending	Display the results in ascending or descending order.
Maximum Results per Page	Set the maximum number of results to display in the Portlet. The default is 50.

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



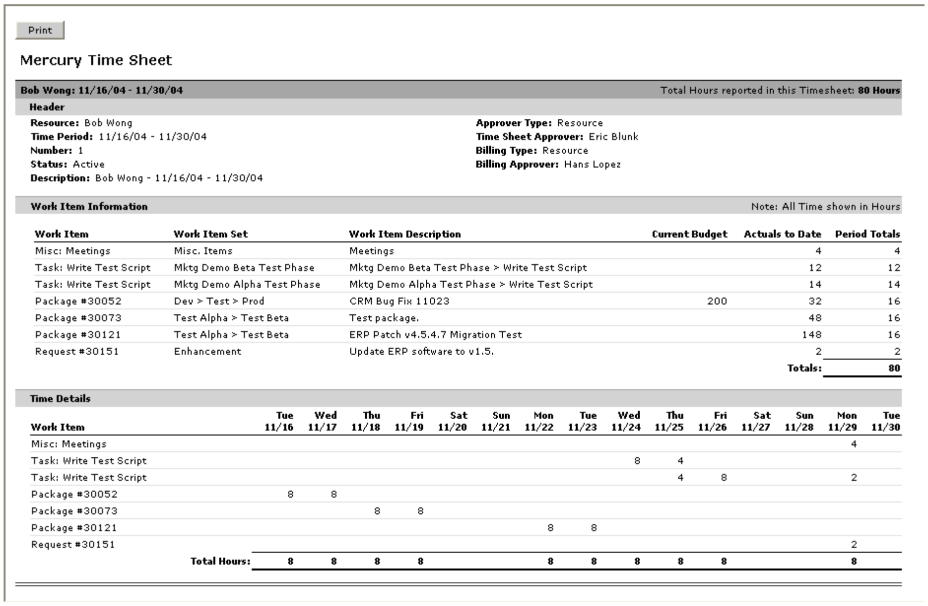
4. On the Time Sheet Search Results page, click Time Sheet # - Time Period.

   The Enter Time page appears.



5. On the Enter Time page, click **Print Time Sheet.**

   A printable version of the Enter Time page appears.



Print

Mercury Time Sheet

Bob Wong: 11/16/04 - 11/30/04 — Total Hours reported in this Timesheet: **80 Hours**

Header

Resource: Bob Wong
Time Period: 11/16/04 - 11/30/04
Number: 1
Status: Active
Description: Bob Wong - 11/16/04 - 11/30/04

Approver Type: Resource
Time Sheet Approver: Eric Blunk
Billing Type: Resource
Billing Approver: Hans Lopez

Work Item Information — Note: All Time shown in Hours

Work Item	Work Item Set	Work Item Description	Current Budget	Actuals to Date	Period Totals
Misc: Meetings	Misc. Items	Meetings		4	4
Task: Write Test Script	Mktg Demo Beta Test Phase	Mktg Demo Beta Test Phase > Write Test Script		12	12
Task: Write Test Script	Mktg Demo Alpha Test Phase	Mktg Demo Alpha Test Phase > Write Test Script		14	14
Package #30052	Dev > Test > Prod	CRM Bug Fix 11023	200	32	16
Package #30073	Test Alpha > Test Beta	Test package.		48	16
Package #30121	Test Alpha > Test Beta	ERP Patch v4.5.4.7 Migration Test		148	16
Request #30151	Enhancement	Update ERP software to v1.5.		2	2
				Totals:	**80**

Time Details

Work Item	Tue 11/16	Wed 11/17	Thu 11/18	Fri 11/19	Sat 11/20	Sun 11/21	Mon 11/22	Tue 11/23	Wed 11/24	Thu 11/25	Fri 11/26	Sat 11/27	Sun 11/28	Mon 11/29	Tue 11/30
Misc: Meetings														4	
Task: Write Test Script									8	4					
Task: Write Test Script										4	8			2	
Package #30052	8	8													
Package #30073			8	8											
Package #30121							8	8							
Request #30151														2	
Total Hours:	**8**	**8**	**8**	**8**			**8**	**8**	**8**	**8**	**8**			**8**	

6. On the printable version of the Enter Time page, click **Print.**

   The printable version of the Enter Time page is sent to the default printer.

Chapter

4

Reviewing and Approving Time Sheets

In This Chapter:

Overview of Reviewing and Approving Time Sheets

Once a time sheet is released, other individuals need to review and approve it. If approved, the time sheet moves towards the final steps in the process (frozen and closed). If rejected, the time sheet goes back to the original user for updating. Managers and designated reviewers can review and approve time sheets.

Time Management also has the concept of delegation. Delegation is where someone is assigned the duties and responsibilities of another. Typically, this occurs in management positions where a manager delegatees their review and approval authority to someone else. Delegations have specific start dates and end dates, and are intended to be temporary re-assignments.

To perform these operations, the delegatee must have the proper access grants. Access grants are not inherited with the delegation. Additionally, charge code access is not transferred to delegatee.

Managers also have implicit delegations, such as the ability to edit the time sheets of their direct reports, if the manager has the Edit Time Sheet access grant.

Time Management Process

This chapter details the procedures associated with Approving Time Sheets. Managers and designated reviewers approve released time sheets. The following lists the actions associated with Approving Time Sheets.

- Review a released time sheet. Reviewing a time sheet leaves the time sheet with a status of **Released.**
- Reject a released time sheet. Rejected time sheets have a status of **Rejected.** Rejected time sheets are returned to their user for edits or other actions.
- Approve a released time sheet so that it can be frozen and closed. Approved time sheets have a status of **Approved.**

Approving Time Sheets Using the Dashboard

Time Management portlets can be configured to review, approve, and reject submitted time sheets. The following lists the portlets used to approve time sheets:

- Time Sheet Approvals portlet
- Time Sheets Delinquent portlet

For complete details regarding the Time Sheet Approvals portlet and the Time Sheets Delinquent portlet, see *Time Management Portlets* on page 67.

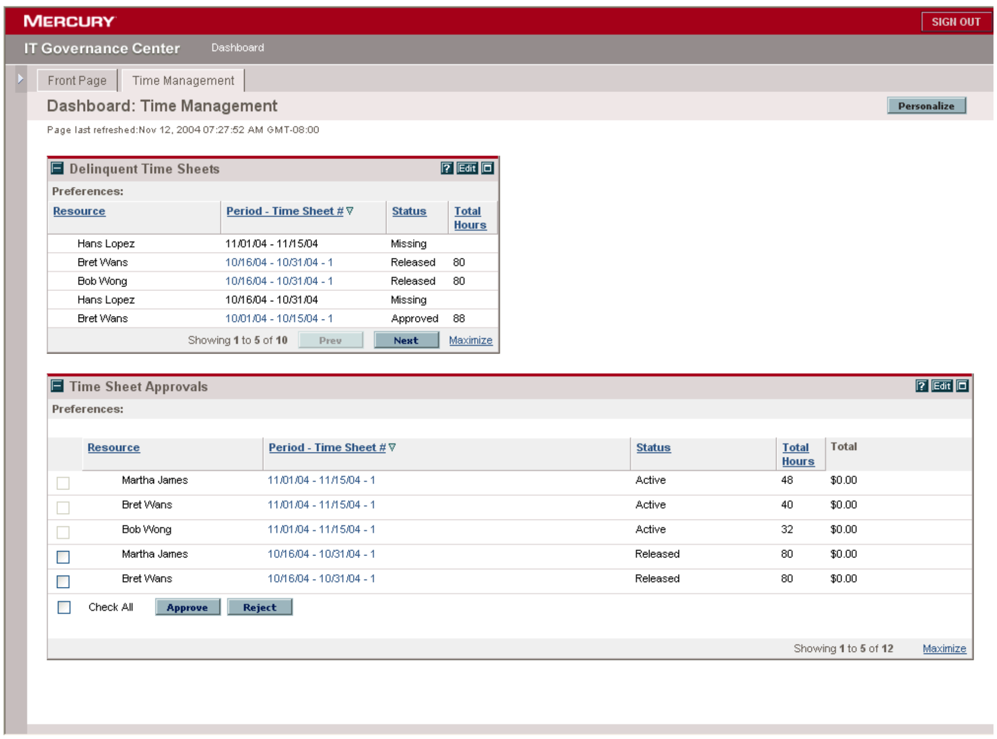


Figure 4-1. Time Management Administrative portlets

The Time Sheets Delinquent portlet can be used to identify your direct reports who have not released a time sheet.

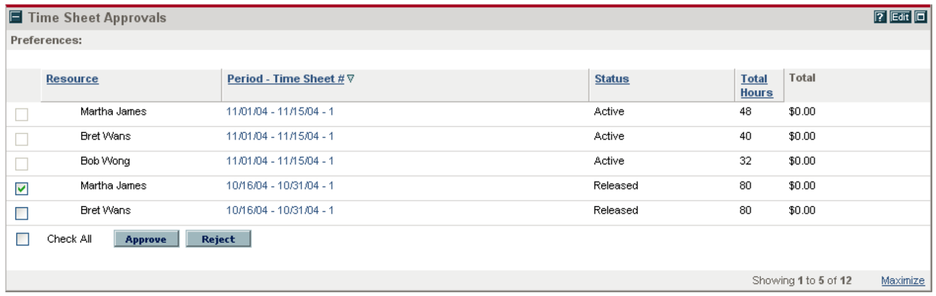
To approve or reject a time sheet from the Dashboard:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. In the Time Sheet Approvals portlet, select the time sheets to approve or reject.

   Only enabled checkboxes can be selected. To select all enabled checkboxes, select the **Check All** checkbox.



3. Approve or reject the time sheet.

   - To approve the time sheet, click **Approve.** The time sheet is approved.
   - To reject the time sheet, click **Reject.** The time sheet is rejected.

Approving Time Sheets Using the Menu Bar

To approve time sheets using the menu bar:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

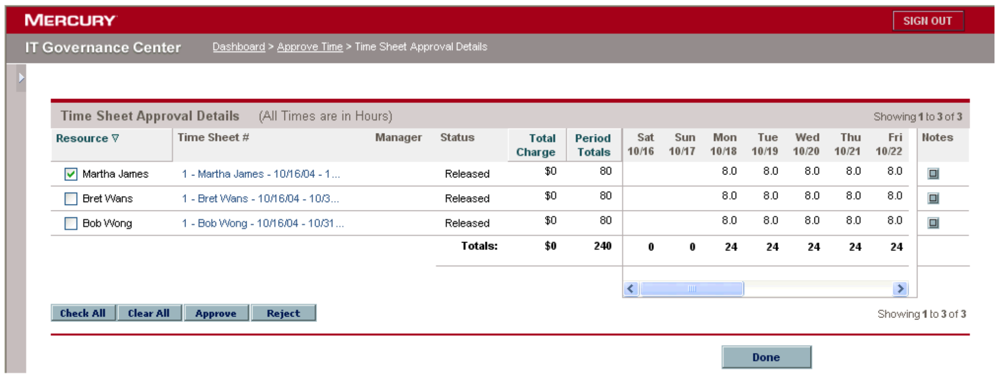
2. From the menu bar, select **Time > Time Sheets > Approve Time Sheets.**

   The Approve Time page appears.

3. On the Approve Time page, complete the search criteria as specified in the following table and click **Search.**

Field	Description
Period Type	Selects the type of time period from the drop-down list. The following lists all of the possible settings: • Weekly • Bi-Weekly • Semi-Monthly • Monthly
Time Period	Selects the time period from the drop-down list. An example of a semi-monthly time period is **09/01/04 – 09/15/04.**
Resource	Selects a resource from the auto-complete list.
Manager	Selects the manager of the resource from the auto-complete list.
Resource Group	Selects the resource group from the auto-complete list.
Time Sheet Status	Selects the status of the time sheet or sheets from the drop-down list. The following lists all of the possible time sheet statuses: • Active • Released • Approved • Frozen • Closed • Cancelled • Rejected The default is Released.
Include Frozen and Closed?	Select **Yes** to include frozen and closed time sheets in the search.
Sort By	Sort the results by the following parameter. The sorting parameters are: • Resource Work Item Set • Time Period • Status • Time Sheet No
Ascending/ Descending	Display the results in ascending or descending order.
Maximum Lines Displayed	Set the maximum number of results to display. The default is 50.

The Time Sheet Approval Details page appears. 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.



4. On the Time Sheet Approval Details page, review the time sheets.

   Time sheets are reviewed using the criteria listed in the following table.

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 one unless: • There are multiple time sheets for the user for the same time period • The user cancelled a time sheet for this 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. When reviewing and approving time sheets, the most common statuses are **Approved, Released,** and **Rejected.**
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.

Field	Description
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, not work allocation notes.

5. On the Time Sheet Approval Details page, approve or reject the time sheet.

- To approve a time sheet:

a. On the Time Sheet Approval Details page, select the time sheet's checkbox (click **Check All** to select all the time sheets).

b. On the Time Sheet Approval Details page, click **Approve.**

The selected time sheets are approved.

- To reject a time sheet:

a. On the Time Sheet Approval Details page, select the time sheet's checkbox (click **Check All** to select all the time sheets).

b. On the Time Sheet Approval Details page, click the Time Sheet Notes button for each rejected time sheet.

The Time Sheet Notes page appears.

c. On the Time Sheet Notes page, enter the reason the time sheet was rejected and click **Add.**

The note is added to the time sheet.

d. On the Time Sheet Notes page, click Close Window.

The Time Sheet Notes page closes.

e. On the Time Sheet Approval Details page, click **Reject.**

The selected time sheets are rejected.

6. On the Time Sheet Approval Details page, click **Done.**

The Time Sheet Approval Details page closes.

Chapter

5

Freezing and Closing Time Sheets

In This Chapter:

Overview of Freezing and Closing 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.

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.

Charge codes are 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.

In some cases, override rules are used to set a charge code. 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 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.

Time Management Process

This chapter details the procedures associated with freezing time sheets. Designated reviewers freeze and close approved time sheets. The following are actions associated with freezing time sheets.

- Freeze an approved time sheet. Freezing a time sheet is designed to give time to third-party billing or charging applications. Mercury Time Management does not have billing or charging functionality. When a time sheet is frozen, its status is **Frozen.**
- Close an approved or frozen time sheet. The final step in the Time Management process is to close a time sheet. When a time sheet is closed, its status is **Closed.**

Freezing and Closing Time Sheets

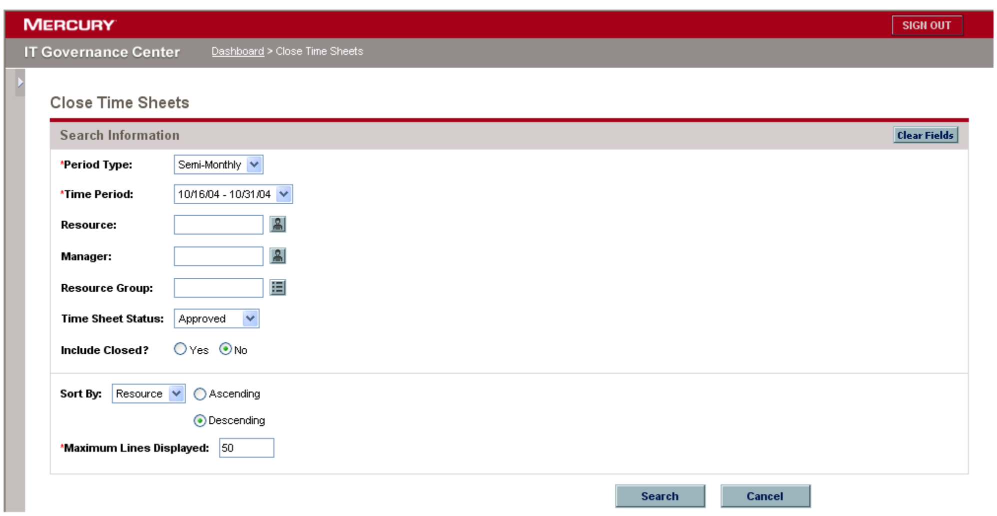
To freeze or close a time sheet:

1. Log on to the standard interface.

   To log on to the standard interface, see the *Getting Started* guide. The standard interface is displayed.

2. From the menu bar, select **Time > Time Sheets > Close Time Sheets.**

   The Close Time Sheets page appears.



3. On the Close Time Sheets page, enter the search criteria as specified in the following table and click **Search.**

Field	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.
Sort By	Sort the results. The sort parameters are: • Resource • Total Hrs • Total Cost
Ascending/ Descending	Display the results in ascending or descending order.
Maximum Lines Displayed	Set the maximum number of results to display. The default is 50.

The Time Sheet Closure Details page is displayed. All time sheets matching the search criteria are listed on the Time Sheet Closure Details page.

4. Freeze or close the time sheet.

- To freeze a time sheet:

  a. On the Time Sheet Closure Details page, select the time sheet's checkbox (click **Check All** to select all the time sheets).

  b. On the Time Sheet Closure Details page, click **Freeze.**

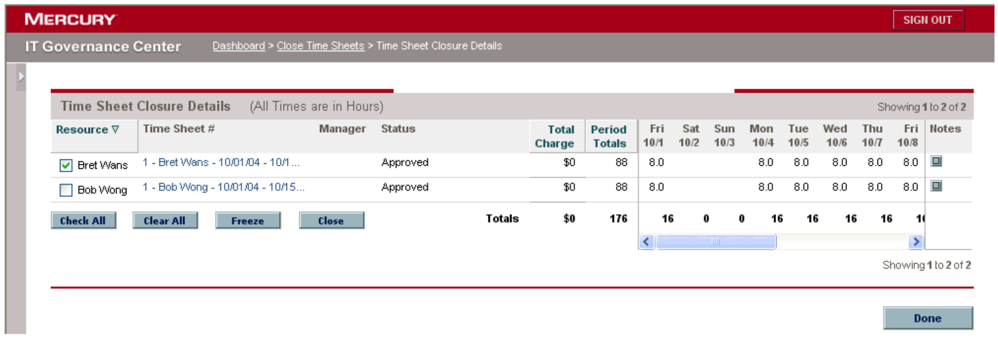
  The selected time sheets are frozen.

- To close a time sheet:

  a. On the Time Sheet Closure Details page, select the time sheet's checkbox (click **Check All** to select all the time sheets).

b. On the Time Sheet Closure Details page, click **Close.**

The selected time sheets are closed.



5. On the Time Sheet Closure Details page, click **Done.**

The Time Sheet Closure Details page closes.

Appendix A

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. Mercury Time Management also includes a Time Management pre-configured Dashboard page. For information concerning how to add Dashboard pages and portlets to Dashboard pages, see the *Getting Started* guide. *Table A-1* lists the Time Management portlets.

Table A-1. Time Management portlets

Portlet	Description
Time Sheet Approvals	Lists time sheets ready for review and approval. This portlet is designed for managers and time sheet reviewers.
Time Sheets Delinquent	Lists users who are missing time sheets. This portlet is designed for managers and time sheet reviewers.
TMG - 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.

Table A-1. Time Management portlets [continued]

Portlet	Description
TMG - 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.
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, enabling you to see 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.

Appendix B
Reports by Category

In This Appendix:

Overview of Report Categories

Reports available through the Mercury IT Governance Center standard interface are listed (by category) and described in the following sections.

Note

Another type of report in Mercury IT Governance Center (not discussed in this document) are server reports, which are submitted and viewed from the Workbench interface, For information about server reports, see the *System Administration Guide and Reference*.

Administrative Reports

The administrative reports (listed in *Table B-1*) are available to users with an administration license.

Table B-1. Administrative reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. This report is also in the Resource category.
Environment Comparison	Helps audit environment definitions when different environments (for example, development and production) are similar to each other.
Environment Detail	Lists the detailed definitions of a given environment or group of environments, the major attributes of the environments, and the attributes of applications tied to the environments.
Environment Group Detail	Contains detailed information about specified environment groups.
Import Requests	Imports requests into Demand Management request tables, moves the requests to the appropriate status, and reports on the results of the execution. For more information about this report, see the *Open Interface Guide and Reference*.

Table B-1. Administrative reports [continued]

Report	Definition
Import Users	Imports data from the user interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Lookup Types	Provides information about one or more lookups.
Notification History	Provides information about notifications that have been sent or are pending.
Object Type Detail	Lists all parameters and commands associated with a given object type.
Portlet Detail	Provides information about a portlet or range of portlets.
RCS Check In	Template of a report used to check files into the RCS repository (if the RCS file management system is being used).
RCS Check Out	Template of a report used to check files out of the RCS repository (if the RCS file management system is being used).
Report Type Detail	Provides information about report type definitions.
Request Header Type Detail	Lists detailed definitional information for request header types.
Request Type Detail	Lists detailed definitional information for request types.
Run Field Security Denormalization	Runs field level security-related denormalization tasks for particular entities.
Run ITG Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server. For more information about this report, see the *Open Interface Guide and Reference*.
Run ITG Package Interface	Validates and loads package data from the package open interface tables into the standard Mercury Change Management data model. For more information about this report, see the *Open Interface Guide and Reference*.
Run Workflow Transaction Interface	Validates and runs workflow transactions based on data in the workflow open interface tables. For more information about this report, see the *Open Interface Guide and Reference*.
Security Group Detail	Lists definitional information for one or more security groups.

Table B-1. Administrative reports [continued]

Report	Definition
Special Command Detail	Provides details for a command (special command) or a range of commands.
Synchronize Meta Layer	Assesses or synchronizes the RML (Reporting Meta Layer).
User Data Detail	Displays the definition of custom user data field (for example, fields on entities like packages, requests, workflows, and security groups).
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is also in the Resource category.
Validations	Provides information about the various custom validations that have been entered into the system as well as those that are standard with Mercury IT Governance Center products.
Workflow Detail	Provides detailed definitional information about specific workflows or sets of workflows.
Workflow Statistics	Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage.

For More Information

Unless otherwise indicated in *Table B-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

The Change Management reports (listed in *Table B-2*) are available to users with a Mercury Change Management application license.

Table B-2. Change Management reports

Report	Definition
Compare Custom Database Setup	Runs custom database comparisons.
Compare Filesystem Environment	Compares the files and file structures of two machines.
Compare MS SQL Server 7 Environments	Compares the data model of two SQL Server Version 7 databases.
Compare Oracle Environments	Compares the data model of two Oracle schemas.
Distribution Detail	Lists the contents and results of a distribution.
Environment Comparison by Objects Migrated	Given two environments, this report looks at the history of all the objects migrated into each environment (using Mercury Change Management) and lists any differences.
Environments/Objects Detail	Lists objects that have been migrated into a given environment or set of environments.
Object History	Provides a workflow step transaction history for packages.
Objects/Environments Detail	Lists objects that have been migrated into a given environment or a set of environments.
Package Details	Returns details about a given package.
Package History	Lists the complete workflow history of a given package.
Package Impact Analysis	Lists three separate sections for analysis: • Other packages that contain common objects with a given package • Objects that have migrated alongside one or more of the objects being migrated on the given package but are not included in the given package • Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed
Packages Pending	Lists: • Open packages with pending activity • Details about each package • Pending work for a group of users

Table B-2. Change Management reports [continued]

Report	Definition
Release Detail	Lists requests, packages and distributions associated with a release.
Release Notes	Shows all of the requests and packages in a release as well as their associations.

For More Information

For more information about Change Management reports, see the *Reports Guide and Reference*.

Demand Management Reports

The Demand Management reports (listed in *Table B-3*) are available to users with a Mercury Demand Management application license.

Table B-3. Demand Management reports

Report	Definition
Contact Detail	Queries the contacts already entered in the Demand Management system that are available for entering and updating requests.
DEM Demand Creation History	Shows the history of demand creation for a specified demand set.
DEM Historical SLA Violation	Shown the history of SLA violations for a specified demand set.
DEM Satisfied Demand History	Shows the history of demand that has been satisfied for a specified demand set.
Request Detail	Provides information about requests using a number of selection criteria.
Request Detail (Filter by Custom Fields)	Similar to the Request Detail report except that requests can be filtered by values in custom fields.
Request History	Lists the complete workflow and field change history for each selected request.
Request Quick View	Lists a quick summary of open and closed requests, breaking down the requests by priority.
Request Summary	Displays the total counts for groups of requests matching the selection criteria.
Request Summary (Filter by Custom Fields)	Similar to the Request Summary report except that requests can be filtered by values in custom fields.
Resource Load by Priority	Lists all open requests assigned to different users. This report is also in the Resource category.

For More Information

For more information about Demand Management reports, see the *Reports Guide and Reference*.

Financial Management Reports

The Financial Management reports (listed in *Table B-4*) are available to users with a Mercury Time Management application license.

Table B-4. Financial Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping. This report is also in the Time Management category.
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. This report is also in the Project Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Project Management category.

For More Information

For more information about Financial Management reports, see the *Reports Guide and Referenc*e.

Portfolio Management Reports

The Portfolio Management reports are available to users with a Mercury Portfolio Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Program Management Reports

The Program Management reports are available to users with a Mercury Program Management™ application license.

There are currently no Mercury-supplied reports in this category, but you can create your own custom reports, if you like.

Project Management Reports

The Project Management reports (listed in *Table B-5*) are available to users with a Mercury Project Management application license.

Table B-5. Project Management reports

Report	Definition
Project Cost Breakdown	Shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs. This report is also in the Financial Management category.
Project Cost Details	Shows the cost details for select projects, grouped by labor/non-labor or operating categorizations. This report is also in the Financial Management category.
Project Critical Path	Displays the tasks that are on a project's critical path.
Project Custom Detail	Generated in HTML table format, showing only the columns that are selected from the header fields and custom fields based on the selected project.
Project Detail	Queries projects by their header fields.
Project Detail (Filter by Custom Fields)	Queries projects by their header fields. You can filter the query using the project's custom fields.
Project Exception Detail	Lists task details for tasks that have violated user-defined exception rules.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. This report is also in the Resource category.
Project Schedule Change	Compares a project plan with a baseline, or a baseline to another baseline.
Project Status Detail	Summarizes project statuses of selected projects and tasks.
Project Summary	Displays all projects that meet the criteria selected in the header fields.
Project Task Assignment	Shows assignment information for a user or a group of users. This report is also in the Resource category.
Project Template Detail	Lists the parameters and parameter details for project templates.

For More Information

For more information about Project Management reports, see the *Reports Guide and Reference*.

Resource Management Reports

The Resource Management reports (listed in *Table B-6*) are available to users with the licenses indicated in the definition column in the table.

Table B-6. Resource Management reports

Report	Definition
Contact Synchronization	Provides an interface for checking whether Mercury Demand Management contacts are properly defined. Available to users with an administration license. This report is also in the Administrative category.
Project Resource	Lists all resources working on a given project and the tasks on which they are working. Available to users with a Mercury Project Management license.
Project Task Assignment	Shows assignment information for a user or a group of users. Available to users with a Mercury Project Management license.
Resource Load by Priority	Lists open requests assigned to different users. Available to users with a Mercury Demand Management license.
User Detail	Lists the users who have been defined in the Mercury IT Governance system, as well as the security groups attached to each user. This report is available to users with any application license. This report is also in the Administration category.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. Available to users with a Mercury Time Management application license. This report is also in the Time Management category.

For More Information

For more information about Resource Management reports, see the *Reports Guide and Reference*.

Time Management Reports

The Time Management reports (listed in *Table B-7*) are available to users with a Mercury Time Management application license.

Table B-7. Time Management reports

Report	Definition
Actual Time/Cost Summary	Summarizes actual time information entered in non-cancelled time sheets and the calculated charge dollar totals for each grouping.
Actual Time Summary	Summarizes actual time information entered in non-cancelled time sheets.
Time Sheet Details	Summarizes multiple time sheets displays their details.
Time Sheet Summary	Summarizes time information entered in non-cancelled time sheets.
Work Allocation Details	Shows much of the same information shown on the Work Allocation definition page—for example, allocation work item information, budget and actuals to date, charge code allocations, and resource restrictions. This report is also in the Resource category.

For More Information

For more information about Time Management reports, see the *Reports Guide and Reference*.

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