Mercury IT Governance Center™
Mercury Portfolio Management™
User's Guide
Version: 6.0

MERCURY™

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Introduction

In This Chapter:

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About This Document

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

- Chapter 1, *Introduction,* on page 11

    Includes an overview of Mercury Portfolio Management and details the document's intended audience and related guides.

- Chapter 2, *Building Your Portfolio,* on page 15

    Explains how to create your portfolio and the entities associated with it.

- Chapter 3, *Viewing Your Portfolio,* on page 27

    Explains how to analyze your current portfolio.

- Chapter 4, *What-If Analysis,* on page 37

    Explains how to use scenario comparisons in Mercury Portfolio Management to perform what-if analysis on your current portfolio.

- Appendix A: *User Licensing and Access* on page 61

    Describes the security settings surrounding Mercury Portfolio Management and its key functionality.

- Appendix B: *Portfolio Management and the Mercury IT Governance Dashboard* on page 69

    Defines the portlets delivered with Mercury Portfolio Management.

- Appendix C: *Reports by Category* on page 89

    Defines the reports delivered as part of Mercury IT Governance Center™.

Who Should Read This Document

The intended audience for this document include:

- Users of Mercury Portfolio Management
- Managers who create and manage proposals, projects, and assets
- Business users responsible for reporting on their portfolio

Related Documents

Related documents for this document are:

- *Guide to Documentation*
- *Key Concepts*
- *Getting Started*
- *Mercury Demand Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury Resource Management User's Guide*
- *Mercury Financial Management User's Guide*
- *Mercury Portfolio Management Configuration Guide*
- *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 Portfolio Management

Mercury Portfolio Management provides a real-time governance setup that supports your strategic, financial, functional, and technical requirements. Ideal for new initiatives that grow and transform your business as well as existing applications that run your business, Mercury Portfolio Management can help you align your IT portfolio with your business strategy and maximize portfolio value.

Mercury Portfolio Management allows business and IT stakeholders to collaboratively govern your portfolio with proper levels of review and approval. Mercury Portfolio Management monitors the entire portfolio lifecycle (proposal justification and review, project initiation, execution, deployment, and benefits realization) and enables stakeholders to make better portfolio decisions and analyze what-if scenarios using easy-to-build scenario comparisons.

Chapter

2

Building Your Portfolio

In This Chapter:

- *Overview of Building Your Portfolio*
- *Creating Proposals*
- *Creating Projects*
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    - *Creating Projects from Scratch*
- *Creating Assets*
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- *Creating a Budget*
- *Creating a Financial Benefit*
- *Creating Business Objectives*
- *Creating Staffing Profiles*

Overview of Building Your Portfolio

This chapter explains how to create proposals, projects, assets, and other entities associated with Mercury Portfolio Management. A portfolio is automatically created when a proposal is submitted. All subsequent projects and assets become part of the current portfolio.

Creating Proposals

The proposal collects all the information needed to make a decision about a proposed project. Once submitted, proposals progress along a predefined business process toward resolution.

To submit a proposal:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Portfolio Management > Submit a Proposal.**

3. Fill in all required fields and any optional fields.

4. Click **Submit.**

   The proposal begins processing along its resolution process.

Creating Projects

A project gathers the information for, records actions taken on, and reflects the current status of an initiative currently being worked on. All active projects count as part of the portfolio.

A project is created automatically when a proposal is approved, carrying over relevant information and entities. Projects can also be created from scratch.

Spawning Projects from Proposals

When a proposal is approved, a corresponding project is automatically created. The budget, staffing profile, and financial benefit attached to the proposal are also copied, and the copies attached to the new project.

Note	The original proposal budget, staffing profile, and financial benefit can be used as a baseline to be compared with the project budget and staffing profile.

Proposal field values automatically copied into the project are described in *Table 2-1*:

Table 2-1. Defaulted project fields

Field	Description
Business Unit	The business unit from which this project originated.
Project Name	The name of the proposed project.
Project Class	The class of project this project belongs to (for example, **Innovation**).
Asset Class	The class of asset this project belongs to (for example, **Strategic**).
Business Objective	The business objective with which the project is aligned.
Project Manager	The manager of the project.
Budget	The proposed budget for the project.
Financial Benefit	Tracks the monetary benefit the project would provide.
Staffing Profile	Tracks the resource demand of the project.
Net Present Value	The NPV for the project, if enabled.
Return on Investment	The ROI for the project, if enabled.
(Custom Field Value)	If defined, the custom metric being used to rank the project.
Value Rating	The total qualitative Value calculated for the project.
Risk Rating	The total qualitative Risk calculated for the project.

Table 2-1. Defaulted project fields [continued]

Field	Description
Total Score	The total qualitative score (Value - Risk) calculated for the project. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this project, if any.

Creating Projects from Scratch

Projects can also be created from scratch, bypassing the proposal process.

To create a project:

1. Select **Portfolio Management > Initiate a Project** from the menu bar.

2. Fill in all required fields and any optional fields.

   Mercury Portfolio Management can be configured in a way that also requires you to create a budget, staffing profile, and financial benefit to attach to the project. See *Creating a Budget* on page 21 and *Creating Staffing Profiles* on page 26 for more detailed information on creating these entities.

3. Click **Submit.**

   The project becomes active.

Creating Assets

An asset gathers the information for, records actions taken on, and reflects the current status of an active asset. All active assets count as part of the portfolio.

An asset is created automatically when a project is completed, carrying over relevant information and entities. Assets can also be created from scratch.

Spawning Assets from Projects

When a project is completed, a corresponding asset is automatically created. The budget, staffing profile, and financial benefit attached to the project are also copied and attached to the new asset.

> **Note** The original project budget, staffing profile, and financial benefit can be used as a baseline to be compared with the asset budget and staffing profile.

Project field values automatically copied into the asset are described in *Table 2-2*:

Table 2-2. Defaulted asset fields

Field	Description
Business Unit	The business unit in charge of the portfolio that includes this asset.
Asset Name	The name of the asset.
Asset Health	The status of the asset.
Project Class	The class of project this asset belongs to (for example, **Innovation**).
Asset Class	The class of asset this asset belongs to (for example, **Strategic**).
Business Objective	The business objective with which the asset is aligned.
Project Manager	The manager of the asset.
Project Plan	The project plan in Mercury Project Management™ that is associated with the asset.
Budget	The budget for the asset.

Table 2-2. Defaulted asset fields [continued]

Field	Description
Financial Benefit	Tracks the monetary benefit the asset provides.
Staffing Profile	Tracks the resource demand of the asset.
Net Present Value	The NPV for the asset.
Return on Investment	The ROI for the asset.
(Custom Field Value)	If defined, the custom metric being used to rank the asset.
Value Rating	The total qualitative Value calculated for the asset.
Risk Rating	The total qualitative Risk calculated for the asset.
Total Score	The total qualitative score (Value - Risk) calculated for the asset. This field can be modified using the Score Adjustment field.
Discount Rate	The discount rate being applied for this asset, if any.

Creating Assets from Scratch

Assets can also be created from scratch, bypassing the proposal or project process.

To create an asset:

1. Select **Portfolio Management > Create an Asset** from the menu bar.

2. Fill in all required fields and any optional fields.

   Mercury Portfolio Management can be configured in a way that also requires you to create a budget, staffing profile, and financial benefit to attach to the asset. See *Creating a Budget* on page 21 and *Creating Staffing Profiles* on page 26 for more detailed information on creating these entities.

3. Click **Submit.**

   The asset is now active in the system.

Creating a Budget

A budget indicates an allocation of money between specific start and finish dates. Between these dates, the budget specifies the money available for each time period (usually a calendar month).

Budgets have many key aspects that can be configured:

* A budget can be associated with a proposal, project, or asset in a 1:1 manner. When a budget is linked with a project that is associated with a project plan, the budget is also linked to that project plan.

* A budget has lines that can be modified individually.

* Budget values can be set to roll up from a project's associated project plan if one exists, either directly from its task lines or from time sheets submitted against it, if Mercury Time Management™ has been installed.

* A budget can have specific users allowed to access it.

* Budgets have statuses associated with them (New, Proposed, Under Review, and so forth) that can be updated.

Note

By default, budget amounts are always entered in thousands. Budgets can also be entered in whole dollars by changing the `server.conf` parameter BUDGET_IN_ WHOLE_DOLLARS to **True.** Usually, only Mercury IT Governance Center administrators have access to the `server.conf` file. Contact your system administrator with any questions about enabling whole dollar tracking in budgets.

Budgets can be created at any time and then linked to a Mercury Porfolio Management entity through the Budget field, or created directly from the Mercury Portfolio Management entity by clicking on the **Budget** icon next to the Budget field.

Figure 2-1. Budget icon

For detailed information on creating and working with budgets, see the *Mercury Financial Management User's Guide*.

Creating a Financial Benefit

A financial benefit is a Mercury Portfolio Management–specific entity used to track the monetary benefit (such as savings and revenue) that a proposal, project, or asset provides. It can also be used in a manner similar to budgets for analyzing the benefit of the current portfolio, as well as making decisions when building scenarios for what-if analyses.

Financial benefits provide a way to enter planned benefit values by period, while capturing actual (or realized) benefits alongside. Financial benefits support categorization by allowing multiple benefit lines to comprise a single benefit. Each line can be specified as either Savings or Revenue.

Financial benefits can be created at any time and then linked to a Mercury Portfolio Management entity through the Financial Benefit field, or created directly from the Mercury Portfolio Management entity by clicking on the icon next to the Financial Benefit field.

To create a financial benefit:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Create > Financial Benefit.**

   The Create New Financial Benefit page opens.

   Create New Financial Benefit

   *Financial Benefit Name:

   Time Range

   *Start Period: December 2004
   *Finish Period: February 2005

   Continue   Cancel

3. Enter the Financial Benefit Name, Start Period, and Finish Period.

4. Click **Continue.**

   The Create New Financial Benefit: Enter Details page opens.

Create New Financial Benefit: Enter Details

| Configure Access | | Create | Cancel |

Financial Benefit Information

Status: New   Active: ○ Yes ⊙ No

*Benefit Name: CRM Realizations Q3

Created On: November 18, 2004   Created By: John Smith

Description:

This Financial Benefit is for:

*Select Region: Enterprise

Start Period: December 2004   Finish Period: February 2005   Change Periods

Financial Benefit Breakdown

Financial Benefit Status: New   Show: ⊙ Plan Only ○ Plan and Actuals

Enter Lines In: ⊙ Months ○ Quarters   Apply

Total Planned Benefit: $0

Breakdown from December 2004 to February 2005 (Numbers in Table in 000)

Add Benefit Lines

		Q4 2004			Q1 2005		
Type	Category	Oct	Nov	Dec	Jan	Feb	Mar
Please use the Add button to add lines to this Financial Benefit.							
Remove Lines							
Month Total				0	0	0	
Quarter Total				0			0

Notes

Notes to be added on save:

| Configure Access | | Create | Cancel |

5. (Optional) Enter any desired information in the Financial Benefit Information section.

6. Add lines to the financial benefit:

    a. Scroll down to the Financial Benefit Breakdown section.

    b. Click **Add Benefit Lines.**

    The Add Lines to Financial Benefit page opens.

c. Specify a Type and Category for the financial benefit line.

d. Click **Add Another** if you want to add additional lines.

When you have finished adding lines, click **Add.**

The Create a New Financial Benefit: Enter Details page opens again, with the new financial benefit lines added.

7. If you want to track actual amounts for your financial benefit alongside the planned amounts, select the Plan and Actuals option in the Show line and click **Apply.**

The Create a New Financial Benefit: Enter Details page reloads with Act fields, enabling you to fill in actual values next to the planned amounts in the financial benefit columns.

8. Click **Create.**

Creating Business Objectives

Business Objectives provide a means to capture your business goals as discrete entities that can be prioritized and tied to Mercury Portfolio Management entities. Business Objectives can be created, modified, and deleted independently of Mercury Portfolio Management entities, though Business Objectives that have already been linked to them cannot be deleted.

To create a Business Objective:

1. From the menu bar, select **Portfolio Management > Business Objectives > Create a Business Objective.**

    The New Business Objective page opens.

2. Fill in all required fields and any optional fields.

3. Click **Done.**

    The Business Objective has been created.

The Business Objective field in a Mercury Portfolio Management entity links the entity to that Business Objective.

Creating Staffing Profiles

Staffing profiles enable a user to track the forecast demand of resources, arranged by skill. Each line in a staffing profile tracks a skill, and optionally a resource who possesses that skill.

Staffing profiles can be linked in a 1:1 manner with proposals, projects, and assets. When a staffing profile is linked with a project that is associated with a project plan, the staffing profile is also linked to that project plan.

Staffing profiles can be created at any time and then linked to a Mercury Portfolio Management entity through the Staffing Profile field, or created directly from the Mercury Portfolio Management entity by clicking on the icon next to the Staffing Profile field.

For detailed information on creating and working with staffing profiles, see the *Mercury Resource Management User's Guide*.

Viewing Your Portfolio

In This Chapter:

- *Overview of Managing Your Portfolio*
- *Analyzing Your Portfolio*
  - *Common Portfolio Analyses*
- *Determining Portfolio Scores*
- *Using Portfolio Management Portlets*
  - *Viewing the Portfolio with the Current Portfolio Portlet*
  - *Viewing Portfolio Financial Data with the Portfolio by Category Portlet*
  - *Viewing Resource Demand with the Resource by Category Portlet*

Overview of Managing Your Portfolio

This chapter explains how to use Mercury Portfolio Management visualizations to view and analyze various aspects of your portfolio.

Analyzing Your Portfolio

View your current portfolio at any time by selecting **Portfolio Management > Analyze Current Portfolio** from the menu bar. The Analyze Current Portfolio page opens, displaying a configurable bubble chart representing the projects and assets currently active. *Table 3-1* describes the filter fields you can use to alter the bubble chart's content and appearance.
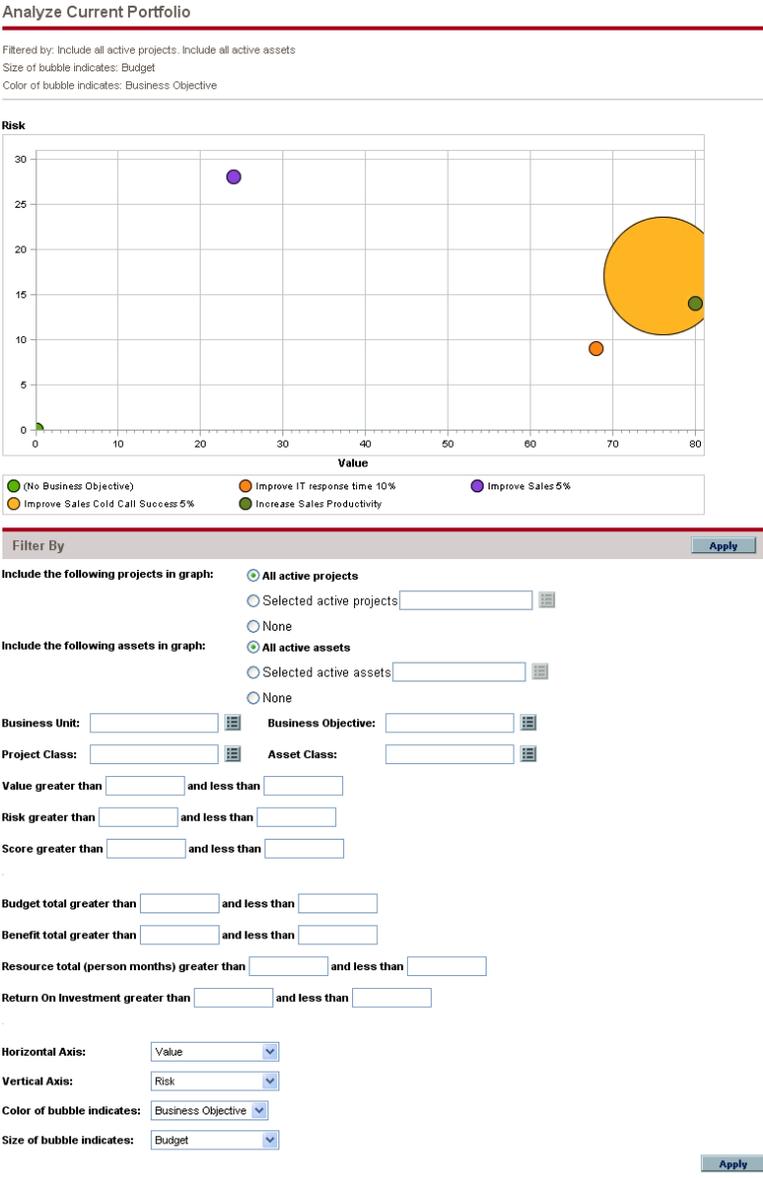
Figure 3-1. Analyze Current Portfolio page

Table 3-1. Analyze Current Portfolio page-filter fields

Field	Description
Include the following projects in graph	Selects the projects to show in the bubble chart. Includes a multi-select auto-complete field.
Include the following assets in graph	Selects the assets to show in the bubble chart. Includes a multi-select auto-complete field.

Table 3-1. Analyze Current Portfolio page-filter fields [continued]

Field	Description
Business Unit	Filters the bubble chart by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the bubble chart by Business Objective. A multi-select auto-complete field.
Project Class	Filters the bubble chart by project Class. A multi-select auto-complete field.
Asset Class	Filters the bubble chart by asset Class. A multi-select auto-complete field.
Value greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Value range.
Risk greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain Risk range.
Score greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain qualitative Score range.
Budget total greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain budget range.
Benefit total greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain financial benefit range.
Resource total (person months) greater than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain resource total by person month range.
Return on Investment greater Than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain ROI range.
Net Present Value greater Than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain NPV range, if NPV is enabled.
Custom Value greater Than (N) and less than (M)	Allows you to filter the bubble chart by selecting entities within a certain custom value range, if the custom value is enabled.
Horizontal Axis	Specifies the scalar for the bubble chart's horizontal axis.
Vertical Axis	Specifies the scalar for the bubble chart's vertical axis.
Color of bubble indicates	Chooses what the color of the bubbles indicates.
Size of bubble indicates	Chooses what the size of the bubbles indicates.

Common Portfolio Analyses

The Analyze Current Portfolio page provides an easy and powerful tool for viewing your portfolio in different ways. Depending on how the filter fields are configured, certain aspects of the portfolio can be highlighted or hidden.

Default Filter Field Settings

The Analyze Current Portfolio page's filter fields are defaulted to display all active projects and assets in the portfolio with no restrictions. *Table 3-2* lists the default values for the display control fields at the bottom.

Table 3-2. Default display settings for Analyze Current Portfolio page

Field	Value
Horizontal Axis	Value
Vertical Axis	Risk
Color of bubble indicates	Business Objective
Size of bubble indicates	Budget

With these default settings in place, you can easily view all currently active projects and assets and quickly gauge their position relative to their Value and Risk ratings. By selecting a Business Unit, you can quickly view the portfolio of a particular business unit using these criteria.

Slicing by Category

By keeping the Analyze Current Portfolio page's *Default Filter Field Settings* and playing with the Color of bubble indicates field, you can view your current portfolio according to risk/reward (Risk/Value ratings), striped by any one of the following categories:

- Business Objective
- Asset Class
- Business Unit
- Health
- Project Class
- Type

Determining Portfolio Scores

Proposals, projects, and assets can be evaluated using qualitative criteria that cannot be calculated purely numerically. These rankings are captured using a set of fields on each Mercury Portfolio Management entity, as illustrated in *Figure 3-2*.

Figure 3-2. Qualitative scoring fields

When filled out, these fields are translated automatically into a numeric qualitative score for that proposal, project, or request.

Figure 3-3. Qualitative scoring fields dictate Total Score

The proposal, project, or asset Total Score can be adjusted manually using the Score Adjustment field.

Figure 3-4. Score Adjustment field

For example, a project sponsor might input **40** into the Score Adjustment field, raising the total score by 40 points.

Someone who thinks the project is riskier than the calculations indicate might input **-30,** lowering the score by 30 points.

Using Portfolio Management Portlets

Mercury Portfolio Management provides several portlets for use in viewing key aspects of your portfolio in real time. These portlets can be personalized to show the most useful information for a particular user.

> **Note** For detailed descriptions of each portlet including filter fields, see *Portfolio Management and the Mercury IT Governance Dashboard* on page 69.

Viewing the Portfolio with the Current Portfolio Portlet

The Current Portfolio portlet provides the same bubble chart as the Analyze Current Portfolio page.
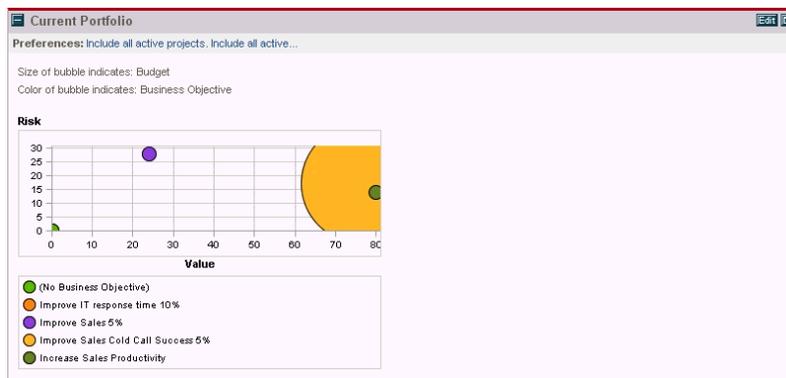
Figure 3-5. Current Portfolio portlet

Multiple instances of this portlet can be placed on a single Dashboard page with different filter field settings. This can provide simultaneous views of different aspects of the current portfolio.

Viewing Portfolio Financial Data with the Portfolio by Category Portlet

The Portfolio by Category portlet can be used to analyze aggregate financially-significant values of your portfolio's contents, including budget, financial benefit, NPV, and ROI.
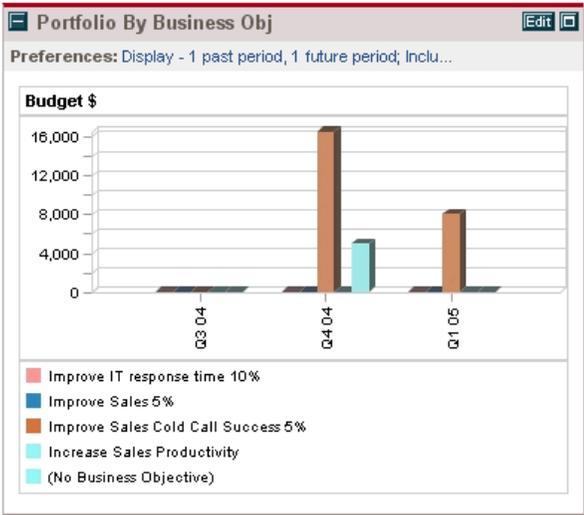
Figure 3-6. Portfolio by Category portlet

You can choose to group these values by Project Class, Asset Class, or Business Objective, which will display a comparison of the selected value within the chosen category per period.

Clicking on a bar in the chart takes you to a drilldown page detailing the budget by period for each entity that makes up the bar.
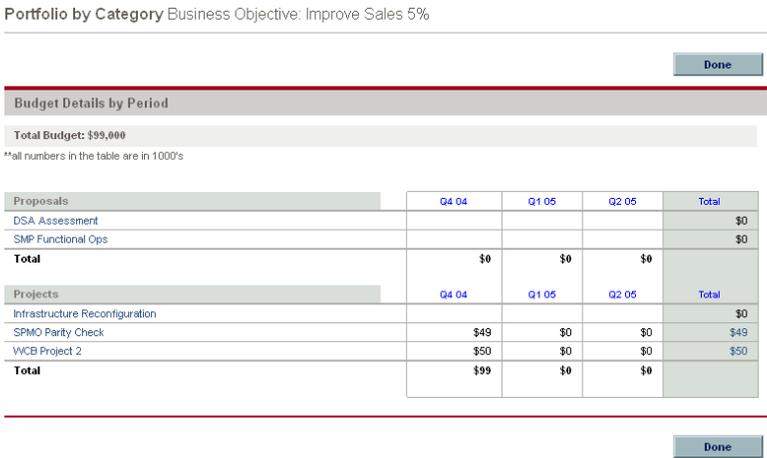
Figure 3-7. Portfolio by Category portlet drilldown page

Viewing Resource Demand with the Resource by Category Portlet

This graphical portlet allows users to perform a by-period comparison of resource requirements and availability in the portfolio.
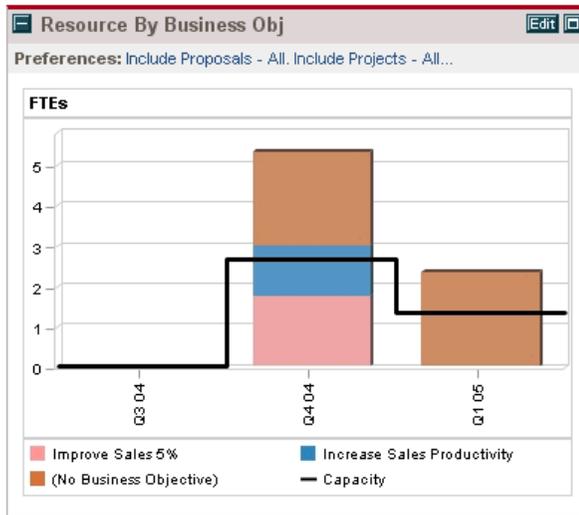
Figure 3-8. Resource by Category portlet

Resource requirements are drawn from the staffing profiles attached to the proposals, projects, and assets being examined in the portlet, while the capacity are calculated based on resource pools specified in the filter page.

Clicking on a section of a bar takes you to a drilldown page showing a breakdown of the assignments in each entity making up that section, as well as the capacity of the selected resource pool(s).

Figure 3-9. Resource by Category portlet drilldown page

Chapter

4

What-If Analysis

In This Chapter:

Overview of What-If Analysis

This chapter explains how to use scenario comparisons to perform what-if analysis. What-if analysis is a way to determine the consequences of portfolio-related decisions without having to actually make purchases and initiate projects. Mercury Portfolio Management allows you to rapidly assemble scenario comparisons that examine and compare potential portfolio scenarios to perform what-if analysis using a number of different visualizations.

Creating a Scenario Comparison

To create a scenario comparison:

1. Log on to Mercury IT Governance Center.

2. From the menu bar, select **Portfolio Management > Scenario Comparisons > Create a Scenario Comparison.**

   The Create Scenario Comparison page opens.

   Create Scenario Comparison

   Comparison Information

   *Comparison Name: DMU Scenarios

   Enter Time Range

   *Start Period: January 2005

   *Finish Period: July 2005

   Enter Scenario Names

   Please enter the names of the three scenarios in this scenario comparison.
   You will be able to change these names later.

   *Scenario 1: Active

   *Scenario 2: Passive

   *Scenario 3: Low-Gain

   Specify Content

   Business Unit:

   Please select whether you would like to have the projects and assets in your current portfolio as well as
   submitted proposals as a starting point for this scenario comparison. Regardless of your choice, you will be
   able to add and remove individual proposals, projects, and assets later.

   ☑ Include all projects and assets from the current portfolio

   ☑ Include submitted proposals

   [Create]   [Cancel]

3. Enter a Comparison Name.

4. Enter a Time Range.

   This will determine the time range for all visualizations in the scenario comparison. The Start and Finish Periods can be changed at any time.

5. Enter names for each scenario.

   Scenario comparisons always contain three scenarios.

6. Specify the content for the scenario comparison.

   This determines the set of proposals, projects, and assets that will be compared in all three scenarios. You can quickly create a set that resembles your current portfolio as a starting point by selecting the checkboxes provided. Scenario comparison contents can be modified later.

7. Click **Create.**

   The scenario comparison is created and the Scenario Comparison page opens.

Scenario Comparison: DMU Scenarios

[Make a Copy] [Configure Access]   [Save]

Scenario Details: 1: Active; 2: Passive; 3: Low-Gain

| *Comparison Name: | DMU Scenarios | Created By: John Smith | Last Updated By: John Smith |

Active: ● Yes ○ No   Last Updated On: November 18, 2004

Description:

Calculate **Total Budget** for comparison from the following Budgets:
CDA Alignment; Work Core Budgetary Project A

Calculate **Total Available Resources** for comparison from the following Resource Pools:
Operational Pool A; Tech Educators A

*Start Period: November 2004
*Finish Period: July 2005

Overview | Budget Summary | Cost Benefit | Budget By Asset Class | Budget By Project Class | Budget By Business Objective

Overview   Graph Period Interval: [Quarter ▾] [Change]

Cost Plan
($)

Resource Plan
(FTEs)

☐ Total Budget ─■─ Active ─◆─ Passive
─●─ Low-Gain

☐ Total Available Resources ─■─ Active
─◆─ Passive

View Skill Availability for: [1. Active ▾] [View]
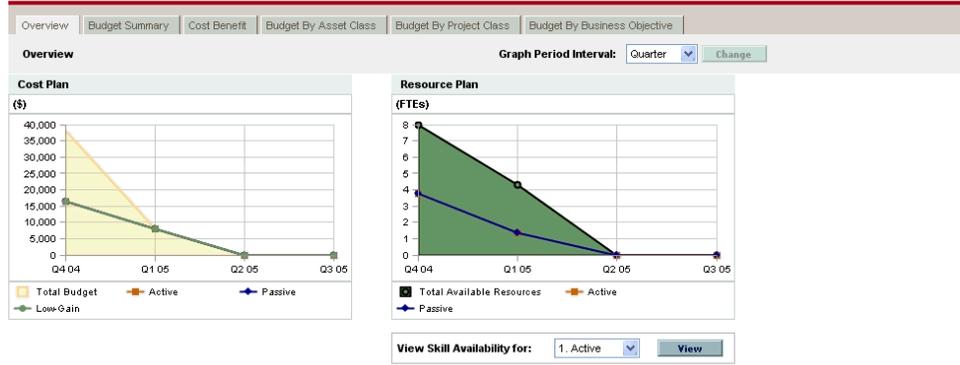
Scenario Content   [Save]

Scenario Names: 1: Active; 2: Passive; 3: Low-Gain

	Name △	Phase	Business Unit	Total Cost	Total Benefit	Total Resources (person months)	ROI	Score	Scenario 1	Scenario 2
✖	CDA System 3	Project	Corporate	$24,441	$0	0	($10,441)	59	☑	☑
✖	CRM System 6.7	Project	Corporate	$0	$24,000	3.71	$24,000	66	☑	☑
✖	DSA Assessment	Proposal	Consumer BU	$0	$0	0	$0	13	☑	☑
✖	Infrastructure Reconfiguration	Project	Corporate	$0	$0	0	($18,864)	59	☑	☑
✖	Sales and Marketing Demo #1	Proposal		$0	$0	0	$0	0	☑	☑
✖	Sales Demo	Project		$0	$85,000	7	$71,000	0	☑	☑
✖	SMP Functional Ops	Proposal	Corporate	$0	$0	0	$0	44	☑	☐
✖	WCB Project 2	Project	Consumer BU	$0	$0	5.22	($51,599)	(4)	☑	☑

Add Content By Phase: [Proposal ▾] [Add] [View Content List]   [Save]

Notes

Notes to be added on save:

[Make a Copy]   [Save] [Cancel]

Using Scenario Comparisons

Scenario comparisons are the means for maintaining and analyzing groups of scenarios. A scenario comparison contains three scenarios that are built from a set of proposals, projects, and assets. These scenarios can then be examined and compared with each other using a number of different visualizations.

Overview

The **Overview** tab in the Scenario Comparison page provides an overview of the three scenarios in the scenario comparison.
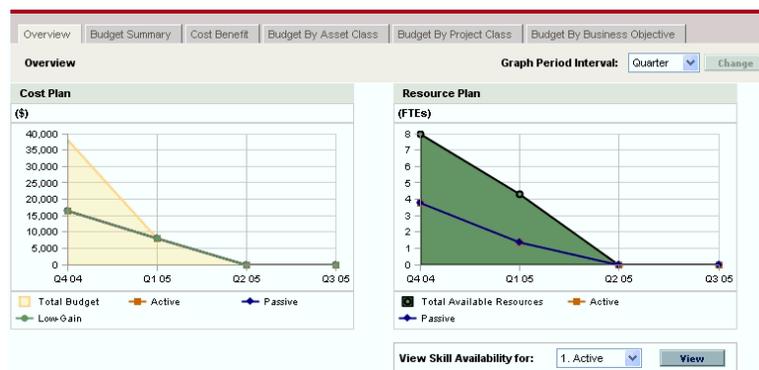
Figure 4-1. Scenario Comparison page—Overview tab

Unlike the other tabs, the **Overview** tab integrates all three scenarios into each of the following visualizations:

- **Cost Plan**
  The Cost Plan graph shows the total budget each scenario will consume per period, as well as the total budget available, if specified. For details on how to specify a total available budget for a scenario comparison, see *Changing Scenario Comparison Details* on page 45.

- **Resource Plan**
  The Resource Plan graph displays the total resource demand of each scenario per period, along with the total available resources, if specified. For details on how to specify total available resources for a scenario comparison, see *Changing Scenario Comparison Details* on page 45.

  You can also view the skill load for a particular scenario and determine at a glance where and when particular skills are needed. For more detailed information, see *Viewing Skill Availabilities and Requirements* on page 52.

To change the time scale used in the graphs, select a new value from the Graph Period Interval drop-down list and click **Change.**

Figure 4-2. Graph Period Interval field

Budget Summary

The **Budget Summary** tab in the Scenario Comparison page provides a graph of the budget information for each scenario.
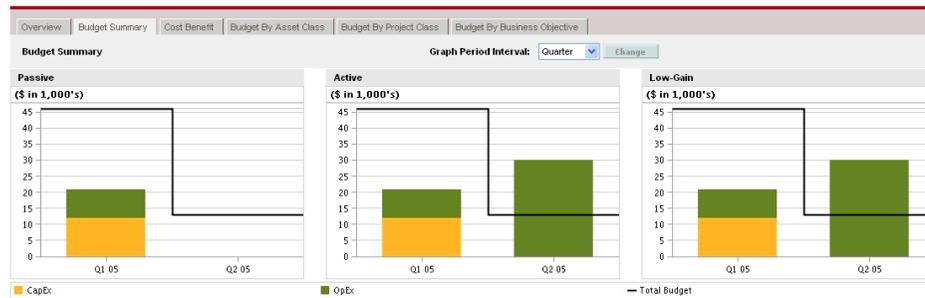
Figure 4-3. Scenario Comparison page—Budget Summary tab

Each graph displays Capital and Operating expense in a stacked bar chart. If there is a total available budget specified for the scenario comparison, it is displayed as the capacity line. For details on how to specify a total available budget for a scenario comparison, see *Changing Scenario Comparison Details on page 45*.

Cost Benefit

The **Cost Benefit** tab in the Scenario Comparison page provides a graph illustrating the cost/benefit analysis for each scenario.
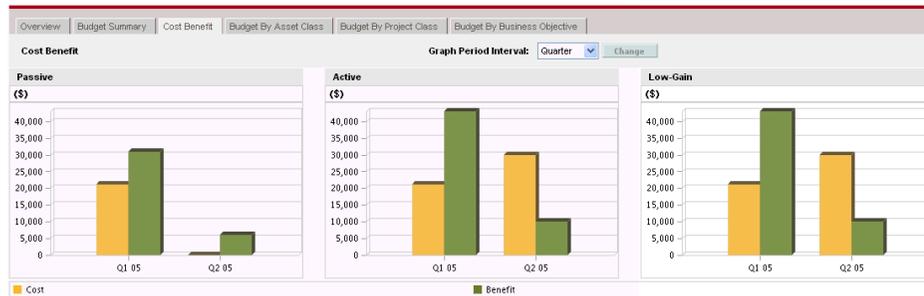
Figure 4-4. Scenario Comparison page—Cost Benefit tab

The graph for each scenario is a bar chart depicting the expected cost per period, as well as the expected benefit. This graph serves the following functions:

● The cost and benefit bars in each graph give information regarding the net benefit by period for each scenario.

● Since the graph is laid out by period, it also portrays the cost and benefit trends for each scenario.

Budget by Asset Class

The **Budget by Asset Class** tab in the Scenario Comparison page provides a graph comparing the budget per period for each scenario by Asset Class.
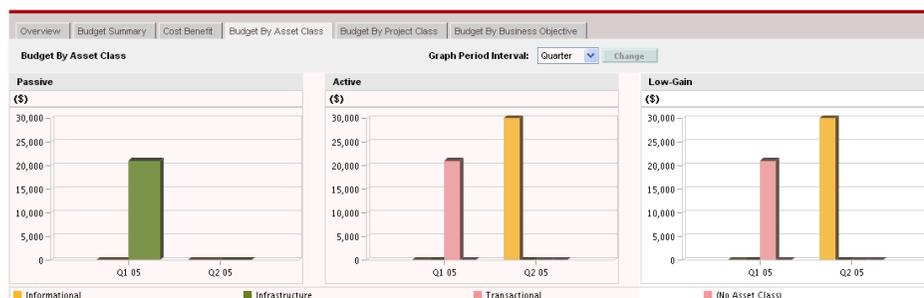
Figure 4-5. Scenario Comparison page—Budget by Asset Class tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Asset Class) in each period. These allow you to compare the budget distribution within a category for each scenario. For example, in the **Budget by Asset Class** graphs, it is possible to visualize how much budget is being spent on Infrastructure initiatives compared to how much budget is being spent on Transactional initiatives.

Budget by Project Class

The **Budget by Project Class** tab in the Scenario Comparison page provides a graph comparing the budget per period for each scenario by Project Class.
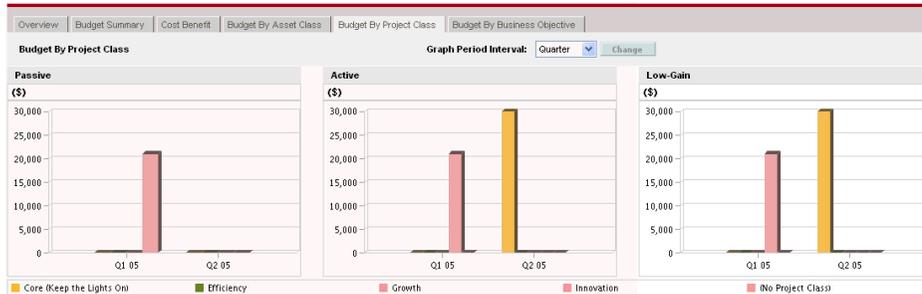
Figure 4-6. Scenario Comparison page–Budget by Project Class tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Project Class) in each period. These allow you to compare the budget distribution within a category for each scenario. For example, in the **Budget by Project Class** graphs, it is possible to visualize how much budget is being spent on Efficiency initiatives compared to how much budget is being spent on Growth initiatives.

Budget by Business Objectives

The **Budget by Business Objectives** tab in the Scenario Comparison page provides a graph comparing the budget per period for each scenario by Business Objective.
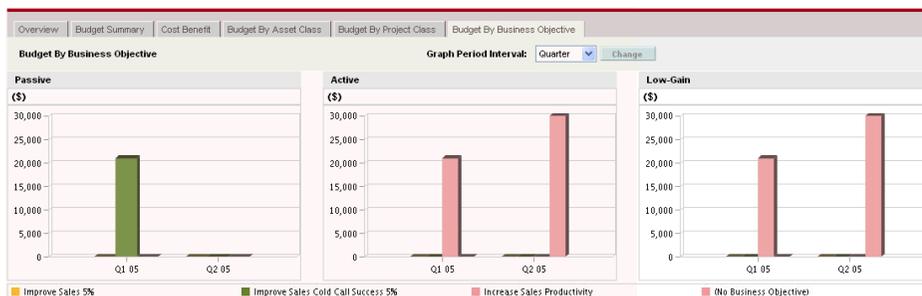
Figure 4-7. Scenario Comparison page–Budget by Business Objective tab

The graph for each scenario consists of a bar chart with adjacent bars (one for each Business Objective) in each period. These allow you to compare the budget distribution under a particular Business Objective for each scenario.

Managing Scenario Comparisons

Scenario comparisons can be changed in a number of different ways:

- Scenario comparison information can be updated.

- Scenario content can be altered.

- Scenario comparisons can be deleted or copied.

- Certain users can be prevented from editing or even viewing scenario comparisons.

Changing Scenario Comparison Details

The top section of the Scenario Comparison page contains information relating to the scenario comparison as a whole. The Comparison Information fields are described in *Table 4-1*.

To change scenario comparison details or add notes, make the desired changes in the appropriate field(s) and click **Save.**

Figure 4-8. Scenario Comparison page—top section

Table 4-1. Scenario Comparison page—top section fields

Field	Description
Make a Copy	Makes a copy of the scenario comparison.
Configure Access	Opens the Configure Access for Scenario Comparison page. See *Setting Scenario Comparison Security* on page 55 for more details.
Scenario Details	A set of links that open the detail pages for each scenario in the scenario comparison.
Comparison Name	The name of the scenario comparison.

Table 4-1. Scenario Comparison page—top section fields

Field	Description
Created By	The user who created the scenario comparison.
Last Updated By	The user who last updated the scenario comparison.
Active	Indicates whether the scenario comparison is active.
Last Updated On	The date the scenario comparison was last updated.
Description	The description for the scenario comparison.
Calculate Total Budget ...	Calculates a total budget for the entire scenario comparison based on the budgets selected.
Calculate Total Available Resources ...	Calculates total resource availability for the entire scenario comparison based on the resource pools selected.
Start Period	The start period for the scenario comparison.
Finish Period	The end period for the scenario comparison.

Notes for the scenario comparison can be added in the **Notes** section at the bottom of the Scenario Comparison page.

Figure 4-9. Scenario Comparison page—Notes section

Adjusting Scenario Comparison Contents

The **Scenario Content** section of the Scenario Comparison page contains and controls the contents of the scenario comparison.

Click to change names of each scenario

Save changes to content list and refresh page

Select the entities that count in each scenario

Click to view entire list of Comparison contents

Click to add content

Choose new type of content to add

Figure 4-10. Scenario Content section controls

Adding a Project, Proposal, or Asset to a Scenario

The **Scenario Content** section lists all of the proposals, projects, and assets being considered in the scenario comparison. The contents of each individual scenario in the scenario comparison are controlled using the checkboxes under the scenario numbers (1, 2, or 3).

Figure 4-11. Scenario Content checkboxes

To change the contents of a scenario:

1. Open the scenario comparison you wish to make changes to.

   For details on finding scenario comparisons, see *Maintaining Scenario Comparisons* on page 53.

2. Scroll down to the **Scenario Content** section.

3. Select the checkbox or boxes under a scenario that corresponds to a proposal, project, or asset that should be added.

   You can also de-select checkboxes corresponding to proposals, projects, or assets that should no longer be included in a scenario.

4. Click **Save.**

   The scenario comparison contents are updated.

Adding Projects, Proposals, or Assets to the Scenario Contents List

The **Scenario Content** section lists all of the proposals, projects, and assets currently being used in the scenario comparison. You can add other proposals, projects, or assets as you see fit.

To add a proposal, project, or asset to the **Scenario Content** section:

1. Open the scenario comparison you wish to make changes to.

   For details on finding scenario comparisons, see *Maintaining Scenario Comparisons* on page 53.

2. Scroll down to the **Scenario Content** section.

3. Select the type of Mercury Portfolio Management entity (project, proposal, or asset) you wish to add from the Add Content By Phase drop-down list.

4. Click **Add.**

   A window opens, displaying a list of Mercury Portfolio Management entities you can add.

5. Select the Mercury Portfolio Management entities you want to add and click **OK.**

   The entities are added to the **Scenario Content** section.

You can also remove Mercury Portfolio Management entities from the **Scenario Content** section by clicking the **Delete** icon next to their names.

Figure 4-12. Delete icon

Changing Scenario Names

The names of individual scenarios in a scenario comparison can be changed.

To change the name of a scenario in a scenario comparison:

1. Open the scenario comparison you wish to make changes to.

   For details on finding scenario comparisons, see *Maintaining Scenario Comparisons* on page 53.

2. Open the desired scenario's Scenario Details page by clicking on the scenario name's link in the Scenario Comparison page.

   The scenario's Scenario Details page opens, with the **Timeline** tab open.

3. In the Scenario Name field, enter the new name.

4. Click **Save.**

   The scenario's data is saved and the Scenario Comparison page reloads.

5. Click **Done.**

Adjusting Scenario Content Dates

The **Timeline** tab of the Scenario Details page allows you to view a Gantt chart of the proposals, projects, and assets within a particular scenario. Additionally, the **Timeline** tab allows you to perform the following actions:

- Change the planned start/end dates of a proposal, project, or asset, assuming no actual dates have been entered

- Remove a proposal, project, or asset from the scenario

- View the details for a particular proposal, project, or asset
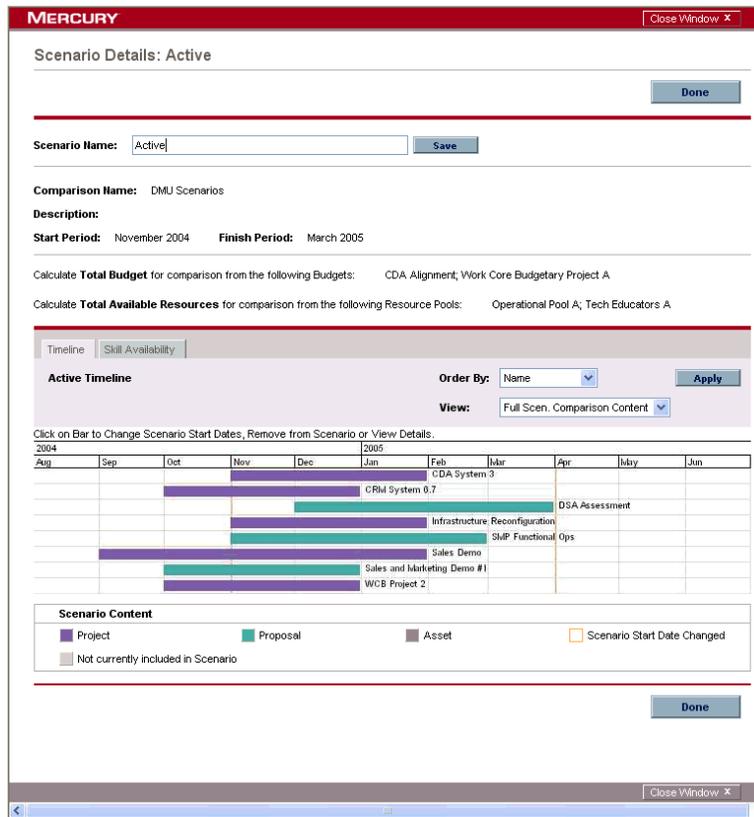
Figure 4-13. Scenario Details page—Timeline tab

Note	If you change the planned start/end dates for an entity, the changes you make will be reflected in the scenario, but you have to open the entity itself and change its date to make it permanent.

For example, portfolio manager Bob changes the start date on the **Timeline** tab of the Scenario Details page for his "Sales Force Upgrade" proposal to accommodate some scheduling conflicts. He likes the way it fits, so he opens the "Sales Force Upgrade" proposal and changes its Expected Start Date to match the scenario.

Once the dates for a Mercury Portfolio Management entity have been changed in the entity itself, the dates for the entity's associated budget, staffing profile, and or financial benefit are also updated automatically.

- The start dates for budgets and staffing profiles are changed to match the start dates for their associated entity.

- The change in start date for a financial benefit matches the change in start date for the associated entity.

  For example, if a proposal's start date is pushed out by three months, the financial benefit's start date is also pushed out by three months.

- Changing the dates for a budget, staffing profile, or financial benefit does not have a "backstream" effect on their associated proposal, project, or asset.

The Scenario Details page for a particular scenario can be reached in the following ways:

- By clicking the scenario name's link at the top of the Scenario Comparison page

- By clicking the scenario name's link in the **Scenario Content** section of the Scenario Comparison page

To change the dates for a proposal, project, or asset in a particular scenario:

1. Open the scenario comparison you wish to make changes to.

   For details on finding scenario comparisons, see *Maintaining Scenario Comparisons* on page 53.

2. Open the scenario's Scenario Details page by clicking on the scenario name's link in the Scenario Comparison page.

   The scenario's Scenario Details page opens, with the **Timeline** tab open.

3. In the Gantt chart, click on the proposal, project, or asset you wish to make changes to.

4. Enter the new date for the entity.

   You can also choose to remove the entity entirely or simply view its details by clicking the appropriate button.

5. Click **Change.**

The entity's start/end date is updated for the scenario. If you wish to make the change permanent, you must open the entity and change the date on the entity itself.

6. Click **Done.**

The scenario's data is saved and the Scenario Comparison page opens.

Viewing Skill Availabilities and Requirements

The **Skill Availability** tab of the Scenario Details page displays a list of all skills required for a particular scenario, along with how many resources are available across its periods. Allocation shortfalls are indicated in parentheses.

For example, if the scenario's first period needs five Java developers and only two are available, a **(3)** is displayed in the first period's column for the Java developer row.

Figure 4-14. Scenario Details page—Skill Availability tab

Clicking the arrow next to any of the skill names causes the Skill Requirement drilldown page to appear. The Skill Requirement drilldown page shows where the need for a particular skill comes from, broken down by proposals, projects, and assets.

Figure 4-15. Skill Requirement drilldown

The **Skill Availability** tab of the Scenario Details page can be reached directly from the Scenario Comparison page by selecting a scenario from the View Skill Load for drop-down list and clicking **View.** See *Adjusting Scenario Content Dates* on page 49 for other ways to reach the Scenario Details page.

Maintaining Scenario Comparisons

All scenario comparisons can be located from the Scenario Comparison List page, accessed by selecting **Portfolio Management > Scenario Comparisons > List Scenario Comparisons** from the menu bar.

Figure 4-16. Scenario Comparison List page

The list of scenario comparisons can be filtered using the parameters described in *Table 4-2*.

Table 4-2. Scenario Comparison List page—filter fields

Field	Description
Created By	Displays only scenario comparisons created by a particular user.
Show Only Comparisons Updated in The Last	Displays only scenario comparisons updated within the period selected from the drop-down list.
Show Only Active Comparisons	Displays only active scenario comparisons.
Apply	Reloads the Scenario Comparison List page with the filters applied.

Scenario comparisons can be deleted or copied.

Deleting a Scenario Comparison

Scenario comparisons can be deleted from the Scenario Comparison List page.

To delete a scenario comparison:

1. Select **Portfolio Management > Scenario Comparisons > List Scenario Comparisons** from the menu bar.

   The Scenario Comparison List page opens.

2. If necessary, filter the Scenario Comparison List page to display the scenario comparison you are looking for.

3. Click the **Delete** icon next to the scenario comparison you wish to delete.

   A question dialog opens.

4. Click **OK.**

   The scenario comparison is deleted.

Copying a Scenario Comparison

Scenario comparisons can be copied from the Scenario Comparison page.

To copy a scenario comparison:

1. Open the scenario comparison you wish to copy.

2. Click **Make a Copy** at the top of the Scenario Comparison page.

   A copy of the scenario comparison is created named "Copy(1) of *<Scenario Comparison Name>*." The Scenario Comparison page for "Copy(1) of *<Scenario Comparison Name>*" opens.

Setting Scenario Comparison Security

Access to a scenario comparison is controlled primarily through access grants set in the security group definitions. Additionally, the user who creates a scenario comparison can specify a list of users who can view it, edit its basic information, edit its contents, or edit its security.

Scenario Comparison Access Grants

Users are linked to access grants through the security group they are a part of. The access grants surrounding scenario comparisons are discussed in more detail in *Table 4-3*. Without these access grants, a user cannot view or edit a scenario comparison regardless of whether they are specified in the list on the scenario comparison's Configure Access page. For more information on access grants and security groups, see *Portfolio Management Security Groups on page 67* or the *Security Model Guide and Reference*.

Table 4-3. Scenario comparison access grants

Access Grant	Description
View Scenario Comparisons	The user can view any scenario comparison for which they are on the specified View or Edit list.
Edit Scenario Comparisons	The user can view, edit, and delete any scenario comparison for which they are on the specified Edit list, as well as create new scenario comparisons.
Manage Scenario Comparisons	The user can view, edit, and delete any scenario comparisons in the system, as well as create new scenario comparisons.

Scenario Comparison Configure Access Page

The Configure Access page for a scenario comparison is used to grant additional editing access to the scenario comparison to each user on the list individually. All users listed on the Configure Access page automatically have at least viewing access.

Note

Without the proper access grants, a user cannot view or edit a scenario comparison regardless of whether they are specified in the list on the scenario comparison's Configure Access page. See *Scenario Comparison Access Grants on page 56* for more detailed information.

Table 4-4 lists the options in the Configure Access page.

Table 4-4. Security options for scenario comparison Configure Access page

Option	Description
View Access	The user can view the scenario comparison but not edit its information. Any user listed has View access.
Edit Basic Information	The user can edit the fields in the Scenario Comparison Information section, but not the scenario comparison contents.
Edit Contents	The user can edit the scenario comparison contents, but not the fields in the Scenario Comparison Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the scenario comparison.
Delete this Comparison	The user can delete the scenario comparison.

Enabling User Access

To set up a list of users with View or Edit access to a scenario comparison:

1. Open the Scenario Comparison page.

   If you have permission to modify the scenario comparison, the **Configure Access** button will be enabled.

2. Click **Configure Access.**

The Configure Access for Scenario Comparison page opens.

3. Add a user or group of users to the list:

   a. Select a user or group of users from the Give Access to Username multi-select auto-complete list

   b. Click **Add.**

4. You can configure each user's access individually by selecting the checkboxes.

   See *Table 4-4* on page 57 for more detailed information on each option.

5. Click **Save.**

Using Scenario Comparison Portlets

Mercury Portfolio Management includes portlets that can be added to your Mercury IT Governance Dashboard. As each portlet is filtered by scenario comparison, and in some cases by scenario, it is possible to have portlets next to each other featuring different scenarios or views into different scenario comparisons entirely. *Figure 4-17* depicts two Budget by Asset Class portlets comparing two scenarios from the same scenario comparison.

Figure 4-17. Budget by Asset Class portlets comparing different scenarios

Table 4-5 describes the scenario comparison portlets available.

Table 4-5. Scenario comparison portlets

Portlet	Description
Total Budget Summary	Similar to the Cost Plan graph in the Scenario Comparison page's **Overview** tab. Shows the total budget each scenario will consume per period, as well as the total budget available (if specified).
Total Resource Summary	Similar to the Resource Plan graph in the Scenario Comparison page's **Overview** tab. Shows the total resource demand for each scenario per period, as well as the total resources available (if specified).
Budget Summary	Similar to the graph in the Scenario Comparison page's **Budget Summary** tab. Displays Capital and Operational expense in a stacked bar chart.
Cost Benefit	Similar to the graph in the Scenario Comparison page's **Cost Benefit** tab. Displays a bar chart depicting the expected cost per period, as well as the expected benefit.

Table 4-5. Scenario comparison portlets

Portlet	Description
Budget by Asset Class	Similar to the graph in the Scenario Comparison page's **Budget by Asset Class** tab. Displays a bar chart with adjacent bars (one for each Asset Class) representing the budget for each period.
Budget by Project Class	Similar to the graph in the Scenario Comparison page's **Budget by Project Class** tab. Displays a bar chart with adjacent bars (one for each Project Class) representing the budget for each period.
Budget by Business Objective	Similar to the graph in the Scenario Comparison page's **Budget by Business Objective** tab. Displays a bar chart with adjacent bars (one for each Business Objective) representing the budget for each period.

For detailed descriptions of each portlet's Edit page, see *Portfolio Management and the Mercury IT Governance Dashboard* on page 69.

In This Appendix:

Overview of Licensing

This appendix discusses the licenses, access grants, and security groups delivered with Mercury Portfolio Management.

Note	Licenses, user accounts and security groups are assigned by the Mercury IT Governance Center Administrator. Contact your application administrator for matters relating to Mercury Portfolio Management licenses.

Portfolio Management License

The Mercury Portfolio Management license grants access to general Mercury Portfolio Management functionality and to configure general Mercury Portfolio Management settings. All users who will be using Mercury Portfolio Management must have a Mercury Portfolio Management license.

Note	Mercury Portfolio Management also requires Mercury Demand Management™. A user with a Mercury Portfolio Management license must also have a Mercury Demand Management license.

Some Mercury Portfolio Management functionality is controlled on a more granular level, either by groups of users or individuals. This level of access is controlled by *Portfolio Management Access Grants*.

Portfolio Management Access Grants

Certain parts of Mercury Portfolio Management are controlled on a more granular level than the Mercury Portfolio Management license, which allows only general access to Mercury Portfolio Management. Access grants allow a Mercury IT Governance Center Administrator to grant partial or total access to these features to groups of users or individuals.

Users are linked to access grants through the security group they are a part of. For more information on access grants and security groups, see *Portfolio Management Security Groups* on page 67 or the *Security Model Guide and Reference*.

Budget Access Grants

The access grants surrounding budgets listed in *Table A-1*. Without these access grants, a user cannot view or edit a budget regardless of whether they are specified in the list on the budget's Configure Access page.

Table A-1. Budget access grants

Access Grant	Description
View Budgets	The user can view any budget for which they are on the specified View or Edit list.
View All Budgets	The user can view any budget in the system.
Edit Budgets	The user can edit any budget for which they are on the specified Edit list.
Create Budgets	The user can create new budgets. Supplemental to the Edit Budgets or Edit All Budgets access grant.
Edit All Budgets	The user can edit any budget in the system.
Update Budgets Status	The user can update the budget Status, but nothing else. Supplemental to the Edit Budgets or Edit All Budgets access grant.
Approve Budgets	The user can set the Budget Status to **Approved,** but nothing else. Supplemental to the Edit Budgets or Edit All Budgets access grant.

Staffing Profile Access Grants

The access grants surrounding staffing profiles are listed in *Table A-2*. Without these access grants, a user cannot view or edit a staffing profile regardless of whether they are specified in the list on the staffing profile's Configure Access page.

Table A-2. Staffing profile access grants

Access Grant	Description
View Staffing Profiles	The user can view any staffing profile for which they are on the specified View or Edit list.
View All Staffing Profiles	The user can view any staffing profile in the system.
Edit Staffing Profiles	The user can edit any staffing profile for which they are on the specified Edit list.
Create Staffing Profiles	The user can create new staffing profiles. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.
Edit All Staffing Profiles	The user can edit any staffing profile in the system.
Update Staffing Profiles Status	The user can update the Profile Status, but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.
Approve Staffing Profiles	The user can set the Profile Status to **Approved,** but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.

Financial Benefit Access Grants

The access grants surrounding financial benefits are discussed in more detail in *Table A-3*. Without these access grants, a user cannot view or edit a financial benefit regardless of whether they are specified in the list on the financial benefit's Configure Access page.

Table A-3. Financial benefit access grants

Access Grant	Description
View Financial Benefits	The user can view any financial benefit for which they are on the specified View or Edit list.
View All Financial Benefits	The user can view any financial benefit in the system.
Edit Financial Benefits	The user can edit any financial benefit for which they are on the specified Edit list.
Create Financial Benefits	The user can create new financial benefits. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.
Edit All Financial Benefits	The user can edit any financial benefit in the system.
Update Financial Benefit Status	The user can update the financial benefit Status, but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.
Approve Financial Benefits	The user can set the financial benefit Status to **Approved,** but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.

Scenario Comparison Access Grants

The access grants surrounding scenario comparisons are listed in *Table A-4*. Without these access grants, a user cannot view or edit a scenario comparison regardless of whether they are specified in the list on the scenario comparison's Configure Access page.

Table A-4. Scenario comparison access grants

Access Grant	Description
View Scenario Comparisons	The user can view any scenario comparison for which they are on the specified View or Edit list.
Edit Scenario Comparisons	The user can view, edit, and delete any scenario comparison for which they are on the specified Edit list, as well as create new scenario comparisons.
Manage Scenario Comparisons	The user can view, edit, and delete any scenario comparisons in the system, as well as create new scenario comparisons.

Portfolio Management Security Groups

Security groups are constructed to provide a set of users with specific access to screens and functions within Mercury Portfolio Management. Each security group is configured with a set of access grants that enable specific access. Users are then associated with one or more security groups.

A user's security group memberships determine which entities a user can view or edit, which processes a user can use, and which process steps a user has authority to act on. Each Mercury Portfolio Management user can be a member of multiple security groups. The collection of security groups to which a user belongs defines that user's role and access within Mercury Portfolio Management.

Table A-5 lists the security groups provided with Mercury Portfolio Management.

Table A-5. Mercury Portfolio Management security groups

Security Group
PFM - Biz Ops Council
PFM - Finance Review Board
PFM - IT Steering Committee
PFM - Manager
PFM - Resource Review Board
PFM - Standards Committee

Portfolio Management and the Mercury IT Governance Dashboard

In This Appendix:

- *Overview of Portfolio Management and the Mercury IT Governance Dashboard*
- *Current Portfolio Portlet*
- *Portfolio by Category Portlet*
- *Resource by Category Portlet*
- *Total Budget Portlet*
- *Total Resource Portlet*
- *Budget Summary Portlet*
- *Cost Benefit Analysis Portlet*
- *Budget by Asset Class Portlet*
- *Budget by Project Class Portlet*
- *Budget by Business Objective Portlet*

Overview of Portfolio Management and the Mercury IT Governance Dashboard

This appendix describes the portlets delivered with Mercury Portfolio Management and provides definitions for their filter fields.

Current Portfolio Portlet

The Current Portfolio portlet displays a configurable bubble chart representing the projects and assets currently active. *Table B-1* describes the portlet's filter fields.

Figure B-1. Current Portfolio portlet

Table B-1. Current Portfolio Map portlet–filter fields

Field	Description
Title	The title of the portlet.
Include the following projects in graph	Selects the projects to show in the portlet. Includes a multi-select auto-complete field.
Include the following assets in graph	Selects the assets to show in the portlet. Includes a multi-select auto-complete field.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the portlet by Business Objective. A multi-select auto-complete field.

Table B-1. Current Portfolio Map portlet–filter fields [continued]

Field	Description
Project Class	Filters the portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the portlet by Asset Class. A multi-select auto-complete field.
Value greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain Value range.
Risk greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain Risk range.
Score greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain qualitative Score range.
Financial Information	
Budget total greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain budget range.
Benefit total greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain financial benefit range.
Resource total (person months) greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain resource total by person month range.
Return on Investment greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain ROI range.
Net Present Value greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain NPV range.
Custom Value greater than (N) and less than (M)	Allows you to filter the portlet by selecting entities within a certain custom value range.
Display Options	
Horizontal Axis	Specifies the scalar for the bubble chart's horizontal axis.
Vertical Axis	Specifies the scalar for the bubble chart's vertical axis.
Color of bubble indicates	Chooses what the color of the bubbles indicates.
Size of bubble indicates	Chooses what the size of the bubbles indicates.

Portfolio by Category Portlet

The Portfolio by Category portlet can be used to analyze aggregate financially-significant values of your portfolio's contents, including budget, financial benefit, NPV, and ROI. *Table B-2* describes the portlet's filter fields.
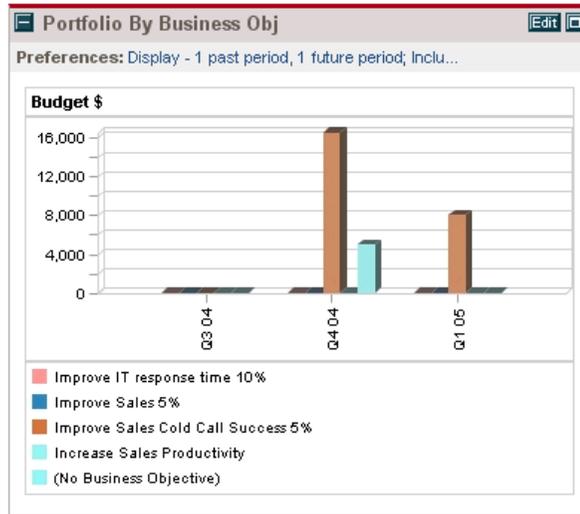
Figure B-2. Portfolio by Category portlet

Table B-2. Portfolio by Category portlet–filter fields

Field	Description
Title	The title of the portlet.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Include Proposals	Selects the proposals to show in the portlet. Includes a multi-select auto-complete field.
Include Projects	Selects the projects to show in the portlet. Includes a multi-select auto-complete field.
Include Assets	Selects the assets to show in the portlet. Includes a multi-select auto-complete field.
Time Period	
Period	Selects the type of time period to display.
Display X Past Periods	Specifies the number of past time periods to display.
Display X Future Periods	Specifies the number of future time periods to display.

Table B-2. Portfolio by Category portlet–filter fields [continued]

Field	Description
Display Options	
Show	Selects the financial value to display.
Group By	Selects a category to group the values by.

Resource by Category Portlet

The Resource by Category portlet allows users to perform a by-period comparison of resource requirements and availability in the portfolio. *Table B-3* describes the portlet's filter fields.
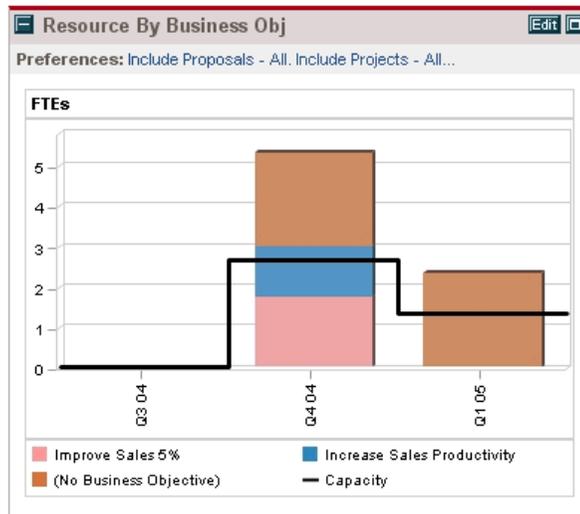
Figure B-3. Resource by Category portlet

Table B-3. Resource by Category portlet—filter fields

Field	Description
Title	The title of the portlet.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Include Proposals	Selects the proposals to show in the portlet. Includes a multi-select auto-complete field.
Include Projects	Selects the projects to show in the portlet. Includes a multi-select auto-complete field.
Include Assets	Selects the assets to show in the portlet. Includes a multi-select auto-complete field.
Calculate Total Available Resources from the Following Resource Pools	Selects the resource pools that will be used to calculate total resource capacity for the portlet.
Time Period	
Period	Selects the type of time period to display.
Display X Past Periods	Specifies the number of past time periods to display.
Display X Future Periods	Specifies the number of future time periods to display.
Display Options	
Group By	Selects a category to group the values by.

Total Budget Portlet

The Total Budget portlet shows the total budget each scenario in a specified scenario comparison will consume per period. The portlet also displays the total budget available, if one is specified in the scenario comparison being referenced. *Table B-3* describes the portlet's filter fields.
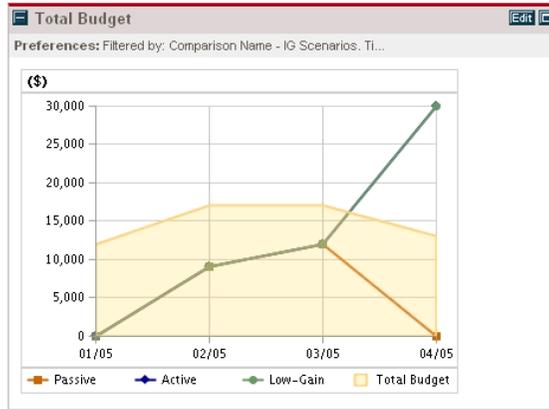
Figure B-4. Total Budget portlet

Table B-4. Total Budget portlet–filter fields

Field	Description
Title	The title of the portlet.
Comparison Name	Selects a scenario comparison to display.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the portlet by project Class. A multi-select auto-complete field.
Asset Class	Filters the portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display proposals, projects, or assets.
Time Range	
Show entire time range	Displays the entire time range considered in the selected scenario comparison.

Table B-4. Total Budget portlet–filter fields [continued]

Field	Description
Show from X to X	Displays a specific time range.
Restore Defaults	Restores the portlet's default settings.
Display Options	
Period	Selects the type of time period to display.

Total Resource Portlet

The Total Resource portlet displays the total resource demand per period of each scenario in a specified scenario comparison. The portlet also displays the total available resources, if specified in the selected scenario comparison. The filter fields for the Total Resource portlet are identical to the *Total Budget Portlet* and are described in *Table B-4*.

Figure B-5. Total Resource portlet

Budget Summary Portlet

The Budget Summary portlet provides a graph of the budget information for each scenario in a specified scenario comparison. Each graph displays Capital and Operating expense in a stacked bar chart. If there is a total available budget specified for the scenario comparison, it is displayed as the capacity line. *Table B-5* describes the portlet's filter fields.
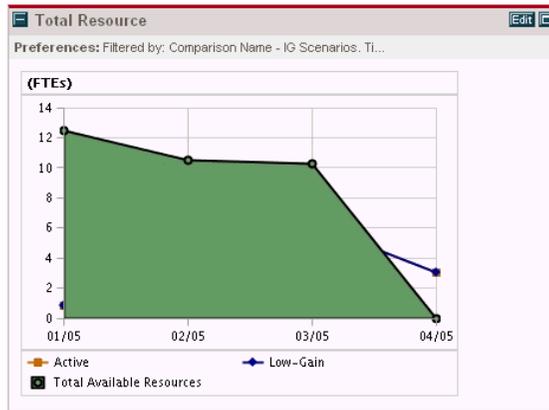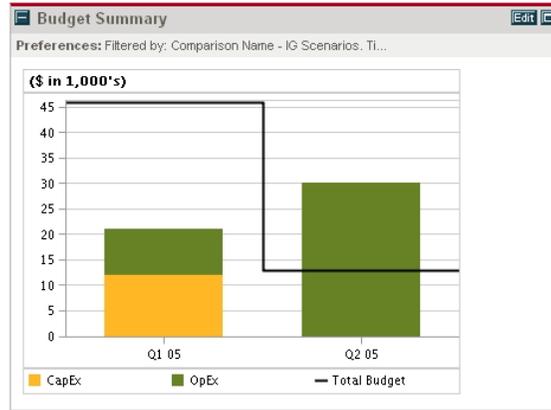

Figure B-6. Budget Summary portlet

Table B-5. Budget Summary portlet—filter fields

Field	Description
Title	The title of the portlet.
Comparison Name	Selects a scenario comparison to display.
Scenario Name	Selects a scenario to display from the specified scenario comparison.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display proposals, projects, or assets.
Time Range	

Table B-5. Budget Summary portlet–filter fields [continued]

Field	Description
Show entire time range	Displays the entire time range considered in the selected scenario comparison.
Show from X to X	Displays a specific time range.
Restore Defaults	Restores the portlet's default settings.
Display Options	
Period	Selects the type of time period to display.

Cost Benefit Analysis Portlet

The Cost Benefit Analysis portlet provides a graph illustrating the cost/benefit analysis for each scenario. The graph consists of a bar chart depicting the expected cost per period, as well as the expected benefit. The filter fields for the Cost Benefit Analysis portlet are identical to the *Budget Summary Portlet* and are described in *Table B-5*.
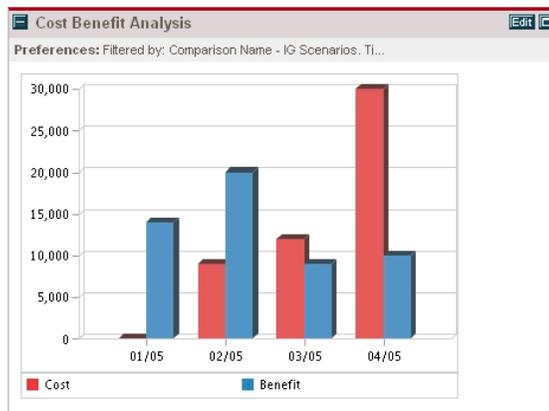

Figure B-7. Cost Benefit Analysis portlet

Budget by Asset Class Portlet

The Budget by Asset Class portlet provides a graph illustrating the budget by Asset Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Asset Class) in each period. *Table B-6* describes the portlet's filter fields.
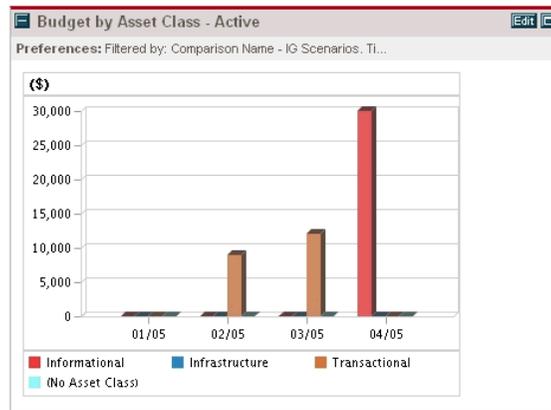

Figure B-8. Budget by Asset Class portlet

Table B-6. Budget by Asset Class portlet—filter fields

Field	Description
Title	The title of the portlet.
Comparison Name	Selects a scenario comparison to display.
Scenario Name	Selects a scenario to display from the specified scenario comparison.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the portlet by Business Objective. A multi-select auto-complete field.
Project Class	Filters the portlet by Project Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display proposals, projects, or assets.
Time Range	
Show entire time range	Displays the entire time range considered in the selected scenario comparison.

Table B-6. Budget by Asset Class portlet–filter fields [continued]

Field	Description
Show from X to X	Displays a specific time range.
Restore Defaults	Restores the portlet's default settings.
Display Options	
Period	Selects the type of time period to display.

Budget by Project Class Portlet

The Budget by Project Class portlet provides a graph illustrating the budget by Project Class per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Project Class) in each period. *Table B-7* describes the portlet's filter fields.
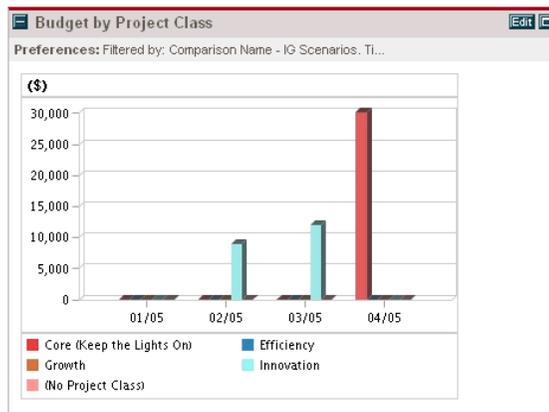

Figure B-9. Budget by Project Class portlet

Table B-7. Budget by Project Class portlet–filter fields

Field	Description
Title	The title of the portlet.
Comparison Name	Selects a scenario comparison to display.
Scenario Name	Selects a scenario to display from the specified scenario comparison.

Table B-7. Budget by Project Class portlet–filter fields [continued]

Field	Description
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Business Objective	Filters the portlet by Business Objective. A multi-select auto-complete field.
Asset Class	Filters the portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display proposals, projects, or assets.
Time Range	
Show entire time range	Displays the entire time range considered in the selected scenario comparison.
Show from X to X	Displays a specific time range.
Restore Defaults	Restores the portlet's default settings.
Display Options	
Period	Selects the type of time period to display.

Budget by Business Objective Portlet

The Budget by Business Objective portlet provides a graph illustrating the budget by Business Objective per period for each scenario. The graph consists of a bar chart with adjacent bars (one for each Business Objective) in each period. *Table B-8* describes the portlet's filter fields.

Figure B-10. Budget by Business Objective portlet

Table B-8. Budget by Business Objective portlet—filter fields

Field	Description
Title	The title of the portlet.
Comparison Name	Selects a scenario comparison to display.
Scenario Name	Selects a scenario to display from the specified scenario comparison.
Business Unit	Filters the portlet by Business Unit. A multi-select auto-complete field.
Project Class	Filters the portlet by Project Class. A multi-select auto-complete field.
Asset Class	Filters the portlet by Asset Class. A multi-select auto-complete field.
Include in Graph	Determines whether to display proposals, projects, or assets.
Time Range	
Show entire time range	Displays the entire time range considered in the selected scenario comparison.
Show from X to X	Displays a specific time range.
Restore Defaults	Restores the portlet's default settings.
Display Options	
Period	Selects the type of time period to display.

Capital Exposure Dashboard Page

Users of Mercury Portfolio Management can use SOP 98-1 functionality to view their capital exposure (the total amount of capital expense to date for all currently open projects) using the Capital Exposure Dashboard page. The Capital Exposure Dashboard page is pre-configured Dashboard content delivered with Portfolio Management that becomes available for use once SOP 98-1 tracking has been activated. It features four portlets designed to display and highlight capital exposure information for your portfolio.
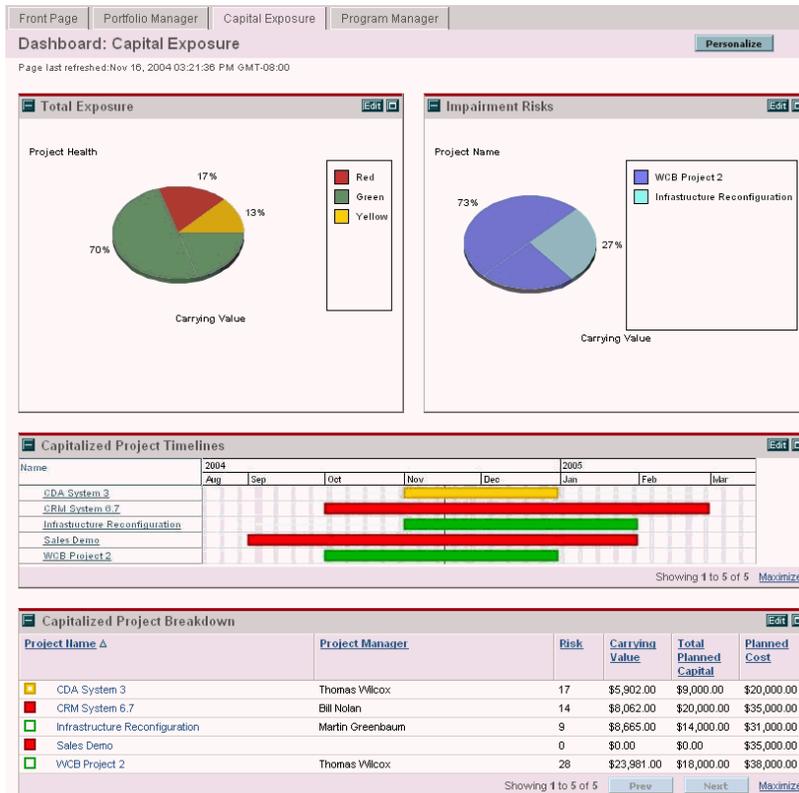

Figure B-11. Capital Exposure Dashboard page

- For more information on SOP 98-1 functionality, see the *Mercury Financial Management User's Guide*.

- For more information on pre-configured Dashboard content and how to add it to your Dashboard, see the *Getting Started* guide.

Total Exposure (SOP 98-1) Portlet

The Total Exposure (SOP 98-1) portlet displays a pie chart of all the projects in your portfolio with capital expenses, sliced by Project Health.
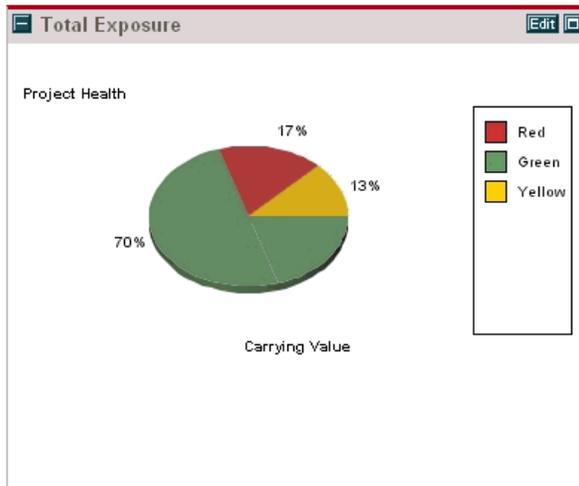

Figure B-12. Total Exposure portlet

This portlet can be filtered according to the criteria described in *Table B-9*.

Table B-9. Total Exposure portlet filter fields

Field	Description
Project Name	Filters for the specified project(s).
Project Manager	Filters for projects with the specified manager(s).
Business Objective	Filters for projects with the specified business objective(s).
Project Status	Filters for projects with the specified status(es).
Project Health	Filters for projects with the specified health(s).
Start Date From	Filters for projects starting after the specified date.
Start Date To	Filters for projects starting before the specified date.
Complete Date From	Filters for projects finishing after the specified date.
Complete Date To	Filters for projects finishing before the specified date.
Min Planned Capital	Filters for projects with at least the specified minimum planned capital expenses.
Min Carrying Value	Filters for projects with at least the specified minimum actual capital expenses.

Table B-9. Total Exposure portlet filter fields

Field	Description
Min Planned Cost	Filters for projects with at least the specified minimum planned cost.
Min Actual Cost	Filters for projects with at least the specified minimum actual cost.

Impairment Risks Portlet

The Impairment Risks portlet is a pie chart that drills down from any one of the pie slices in the Total Exposure (SOP 98-1) portlet. The Impairment Risks portlet's pie slices correspond to the capital expenses of each project that makes up the slice selected from the Total Exposure (SOP 98-1) portlet.
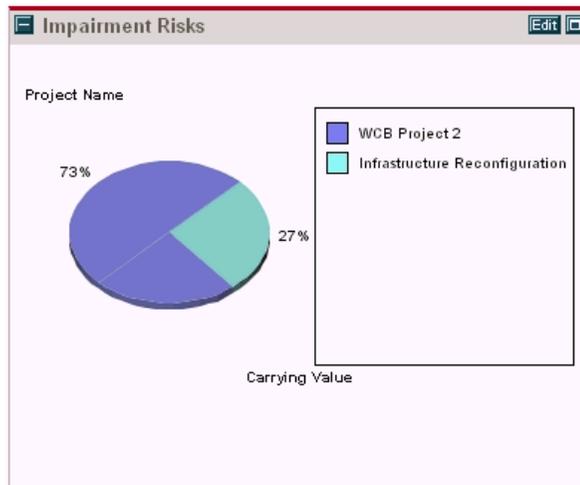
Figure B-13. Impairment Risks portlet

This portlet can be filtered according to the criteria described in *Table B-10*.

Table B-10. Impairment Risks portlet filter fields

Field	Description
Project Name	Filters for the specified project(s).
Project Manager	Filters for projects with the specified manager(s).
Business Objective	Filters for projects with the specified business objective(s).
Project Status	Filters for projects with the specified status(es).
Project Health	Filters for projects with the specified health(s).

Table B-10. Impairment Risks portlet filter fields

Field	Description
Start Date From	Filters for projects starting after the specified date.
Start Date To	Filters for projects starting before the specified date.
Complete Date From	Filters for projects finishing after the specified date.
Complete Date To	Filters for projects finishing before the specified date.
Min Planned Capital	Filters for projects with at least the specified minimum planned capital expenses.
Min Carrying Value	Filters for projects with at least the specified minimum actual capital expenses.
Min Planned Cost	Filters for projects with at least the specified minimum planned cost.
Min Actual Cost	Filters for projects with at least the specified minimum actual cost.

Capitalized Project Timelines Portlet

The Capitalized Project Timelines portlet displays a Gantt chart showing the timelines of all capitalized projects in the portfolio by default.
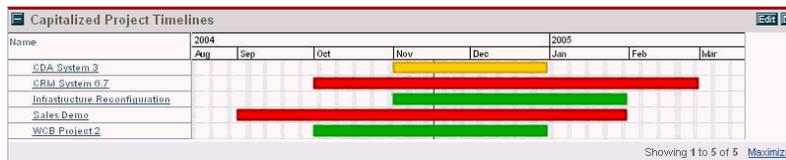
Figure B-14. Capitalized Project Timelines portlet

This portlet can be filtered according to the criteria described in *Table B-11*.

Table B-11. Capitalized Project Timelines portlet filter fields

Field	Description
Project Name	Filters for the specified project(s).
Project Manager	Filters for projects with the specified manager(s).
Business Objective	Filters for projects with the specified business objective(s).
Project Status	Filters for projects with the specified status(es).
Project Health	Filters for projects with the specified health(s).

Table B-11. Capitalized Project Timelines portlet filter fields

Field	Description
Start Date From	Filters for projects starting after the specified date.
Start Date To	Filters for projects starting before the specified date.
Complete Date From	Filters for projects finishing after the specified date.
Complete Date To	Filters for projects finishing before the specified date.
Min Planned Capital	Filters for projects with at least the specified minimum planned capital expenses.
Min Carrying Value	Filters for projects with at least the specified minimum actual capital expenses.
Min Planned Cost	Filters for projects with at least the specified minimum planned cost.
Min Actual Cost	Filters for projects with at least the specified minimum actual cost.

Capitalized Project Breakdown

The Capitalized Project Breakdown portlet shows the capitalization information for all capitalized projects in the portfolio by default. The Remaining Capital Expenses column is calculated as follows:

Planned Capital Expenses - Carrying Value = Remaining Capital Expenses

Figure B-15. Capitalized Project Breakdown portlet

This portlet can be filtered according to the criteria described in *Table B-12*.

Table B-12. Capitalized Project Breakdown portlet filter fields

Field	Description
Project Name	Filters for the specified project(s).
Project Manager	Filters for projects with the specified manager(s).
Business Objective	Filters for projects with the specified business objective(s).

Table B-12. Capitalized Project Breakdown portlet filter fields

Field	Description
Project Status	Filters for projects with the specified status(es).
Project Health	Filters for projects with the specified health(s).
Start Date From	Filters for projects starting after the specified date.
Start Date To	Filters for projects starting before the specified date.
Complete Date From	Filters for projects finishing after the specified date.
Complete Date To	Filters for projects finishing before the specified date.
Min Planned Capital	Filters for projects with at least the specified minimum planned capital expenses.
Min Carrying Value	Filters for projects with at least the specified minimum actual capital expenses.
Min Planned Cost	Filters for projects with at least the specified minimum planned cost.
Min Actual Cost	Filters for projects with at least the specified minimum actual cost.

Appendix
C
Reports by Category

In This Appendix:

- *Overview of Report Categories*
- *Administrative Reports*
- *Change Management Reports*
- *Demand Management Reports*
- *Financial Management Reports*
- *Portfolio Management Reports*
- *Program Management Reports*
- *Project Management Reports*
- *Resource Management Reports*
- *Time Management Reports*

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 C-1*) are available to users with an administration license.

Table C-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 C-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 C-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 C-1*, see the *Reports Guide and Reference* for more information about Administrative reports.

Change Management Reports

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

Table C-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

Appendix C: *Reports by Category*

Table C-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*.

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Demand Management Reports

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

Table C-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 C-4*) are available to users with a Mercury Time Management application license.

Table C-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 Mercury Financial Management™ reports, see the *Reports Guide and Reference*.

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 C-5*) are available to users with a Mercury Project Management application license.

Table C-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 C-6*) are available to users with the licenses indicated in the definition column in the table.

Table C-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 Mercury Resource Management™ reports, see the *Reports Guide and Reference*.

Time Management Reports

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

Table C-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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