

Mercury IT Governance Center™

Mercury Time Management™

User's Guide

Version: 7.0



This manual, and the accompanying software and other documentation, is protected by U.S. and international copyright laws, and may be used only in accordance with the accompanying license agreement. Features of the software, and of other products and services of Mercury Interactive Corporation, may be covered by one or more of the following patents: United States: 5,511,185; 5,657,438; 5,701,139; 5,870,559; 5,958,008; 5,974,572; 6,137,782; 6,138,157; 6,144,962; 6,205,122; 6,237,006; 6,341,310; 6,360,332; 6,449,739; 6,470,383; 6,477,483; 6,549,944; 6,560,564; 6,564,342; 6,587,969; 6,631,408; 6,631,411; 6,633,912; 6,694,288; 6,738,813; 6,738,933; 6,754,701; 6,792,460 and 6,810,494. Australia: 763468 and 762554. Other patents pending. All rights reserved.

U.S. GOVERNMENT RESTRICTED RIGHTS. This Software Documentation is a “commercial item” as defined at 48 C.F.R. 2.101 (October 1995). In accordance with 48 C.F.R. 12.212 (October 1995), 48 C.F.R. 27.401 through 27.404 and 52.227-14 (June 1987, as amended) and 48 C.F.R. 227.7201 through 227.7204 (June 1995), and any similar provisions in the supplements to Title 48 of the C.F.R. (the “Federal Acquisition Regulation”) of other entities of the U.S. Government, as applicable, all U.S. Government users acquire and may use this Documentation only in accordance with the restricted rights set forth in the license agreement applicable to the Computer Software to which this Documentation relates.

Mercury, Mercury Interactive, the Mercury logo, the Mercury Interactive logo, LoadRunner, WinRunner, SiteScope and TestDirector are trademarks of Mercury Interactive Corporation and may be registered in certain jurisdictions. The absence of a trademark from this list does not constitute a waiver of Mercury's intellectual property rights concerning that trademark.

All other company, brand and product names may be trademarks or registered trademarks of their respective holders. Mercury disclaims any responsibility for specifying which marks are owned by which companies or which organizations.

Mercury provides links to external third-party Web sites to help you find supplemental information. The content and availability may change without notice. Mercury makes no representations or warranties whatsoever as to the content or availability.

Mercury
379 North Whisman Road
Mountain View, CA 94043
<http://www.mercury.com>

© 1997–2006 Mercury Interactive Corporation. All rights reserved.

If you have any comments or suggestions regarding this document, please send email to documentation@mercury.com.

Table of Contents

List of Figures	vii
List of Tables	ix
Chapter 1: Getting Started with Mercury Time Management	11
Introduction to Mercury Time Management.....	12
Overview of the Time Management Process.....	13
Create Work Allocations	14
Create, Complete, and Submit Time Sheets	14
Approve Time	15
Freeze Time Sheets.....	15
Bill or Charge with Third-Party Applications	15
Close Time Sheets.....	15
Using Activities to Categorize Time To Be Tracked	16
Using Work Items in Time Sheets and Work Allocations	16
Using the My Tasks Portlet and Project Integration	17
Related Information.....	18
Chapter 2: Reporting Your Time	19
Overview of Reporting Your Time.....	20
Creating a Time Sheet	22
Understanding Time Sheets and Time Sheet Lines	25
Adding Work Items to a Time Sheet	29
Using the My Items List	30
Adding Items to the My Items List	31
Deleting Items from the My Items List.....	38
Adding Items from the My Items List to a Time Sheet.....	38

Using the Suggested Items List.....	39
Adding Items from the Suggested Items List to a Time Sheet.....	40
Adding Items from the Suggested Items List to the My Items List.....	40
Adding Requests Directly to a Time Sheet.....	41
Adding Packages Directly to a Time Sheet.....	43
Adding Tasks Directly to a Time Sheet.....	44
Tasks for Which You Can Log Time.....	45
Adding Tasks to the Time Sheet.....	47
Adding Miscellaneous Items Directly to a Time Sheet.....	49
Deleting Items (Lines) from a Time Sheet.....	49
Reporting Time on the Time Breakdown Tab.....	50
Completing the Project Fields Tab.....	53
Displaying the Additional Information Tab.....	55
Viewing and Specifying Time Sheet Line Details (Work Item Details).....	56
Charge Codes/Activities Tab.....	56
Approvals/Transaction Details Tab.....	57
Notes Tab.....	58
User Data Tab.....	59
Submitting a Time Sheet.....	60
Time Sheet Approvals and Transaction Details.....	61
Summary of Time Sheet and Time Sheet Line Statuses.....	63
Searching Time Sheets.....	64
Editing a Time Sheet.....	67
Reworking Time Sheet Lines.....	67
Copying a Time Sheet.....	68
Cancelling a Time Sheet.....	69
Printing a Time Sheet.....	70
Viewing the Audit Trail.....	71
Time Sheet Policies.....	72
Using the My Tasks Portlet.....	74
Integration of Mercury Time Management and Mercury Project Management.....	75
Chapter 3: Reviewing and Approving Time.....	77
Overview of Reviewing and Approving or Rejecting Time.....	78
Determining Time Approvers.....	78
Delegation.....	79

Approving or Rejecting Time	80
Approving or Rejecting Time Using the Approve Time Page.....	80
Approving or Rejecting Time Using the TMG - Time Sheet Approvals Portlet	84
Approving or Rejecting Time from the Project Overview Page.....	86
Finding Delinquent (Overdue) Time Sheets	87
Chapter 4: Freezing and Closing Time Sheets	91
Overview of Freezing and Closing Time Sheets.....	92
Freezing and Closing Time Sheets.....	93
Chapter 5: Creating Work Allocations for Users.....	97
Overview of Creating Work Allocations for Users.....	98
Creating Work Allocations.....	98
Editing, Closing, and Deleting Existing Work Allocations.....	106
Chapter 6: Integrating Time Management and Project Management.....	109
Overview of Integrating Time Management and Project Management	110
Integrating Time Management and Project Management	111
Index	117

List of Figures

Figure 1-1	Mercury Time Management process overview	13
Figure 2-1	Example time sheet.....	25
Figure 2-2	Example Suggested Items list.....	39
Figure 2-3	Example time sheet, Time Breakdown tab.....	50
Figure 2-4	Example time sheet, Project Fields tab	53
Figure 2-5	Example time sheet, Additional Information tab.....	55
Figure 2-6	Work Item Details, Charge Codes/Activities tab.....	56
Figure 2-7	Work Item Details, Approvals/Transaction Details tab	57
Figure 2-8	Work Item Details, Notes tab	58
Figure 2-9	Work Item Details, User Data tab	59
Figure 2-10	Time Sheet Details - Approval Details/Transaction History	61
Figure 2-11	Time Sheet Audit Trail (first) window	71
Figure 2-12	Time Sheet Audit Trail (second) window	71
Figure 2-13	Create Time Sheet page that has a warning	73
Figure 2-14	Time Sheet Policy Warnings.....	73
Figure 2-15	My Tasks portlet.....	74
Figure 2-16	Effort Breakdown window	76
Figure 3-1	TMG - Time Sheet Approvals portlet.....	84

List of Tables

Table 2-1	Basic time sheet fields, buttons, and links	26
Table 2-2	Columns, buttons, and link on all Time Sheet Details tabs	28
Table 2-3	Example: project, summary tasks, and tasks for which resources can log time ..	46
Table 2-4	Time Sheet Details, Time Breakdown tab fields.....	51
Table 2-5	Time Sheet Details - Approval Details/Transaction History fields	62
Table 2-6	Time sheet line statuses and time sheet statuses.....	63
Table 2-7	Time Sheet Audit Trail fields.....	72



Chapter
1

Getting Started with Mercury Time Management

In This Chapter:

- *Introduction to Mercury Time Management*
 - *Overview of the Time Management Process*
 - *Using Activities to Categorize Time To Be Tracked*
 - *Using Work Items in Time Sheets and Work Allocations*
 - *Using the My Tasks Portlet and Project Integration*
 - *Related Information*
-

Introduction to Mercury Time Management

Mercury Time Management™ is a Mercury IT Governance Center™ application within Mercury IT Governance Center that uses time sheets to track actual time spent on work items. A work item is a unit of work that can be planned, estimated, and tracked to collect actual effort as it is completed. Project managers assign particular work items to particular resources (users). Work items are categorized by type as requests, packages, project tasks, and miscellaneous. For more information about work items, see *Using Work Items in Time Sheets and Work Allocations* on page 16.

You complete time sheets (or the My Tasks portlet) to report the actual time you spent on work items—project tasks that are assigned to you, and work items of all types that you specify with the help of Mercury Time Management. Designated approvers then review and approve the reported time. Project managers can compare reported “actuals” to previously estimated time and associated costs.

As described in detail in this guide, depending on your responsibilities, you can use Mercury Time Management to:

- Create and manage time sheets (many users will use Mercury Time Management for only this purpose)
- Review and approve time from time sheets
- Freeze and close time sheets
- Create work allocations for users
- Compare actual time reported by users against estimated time and associated costs

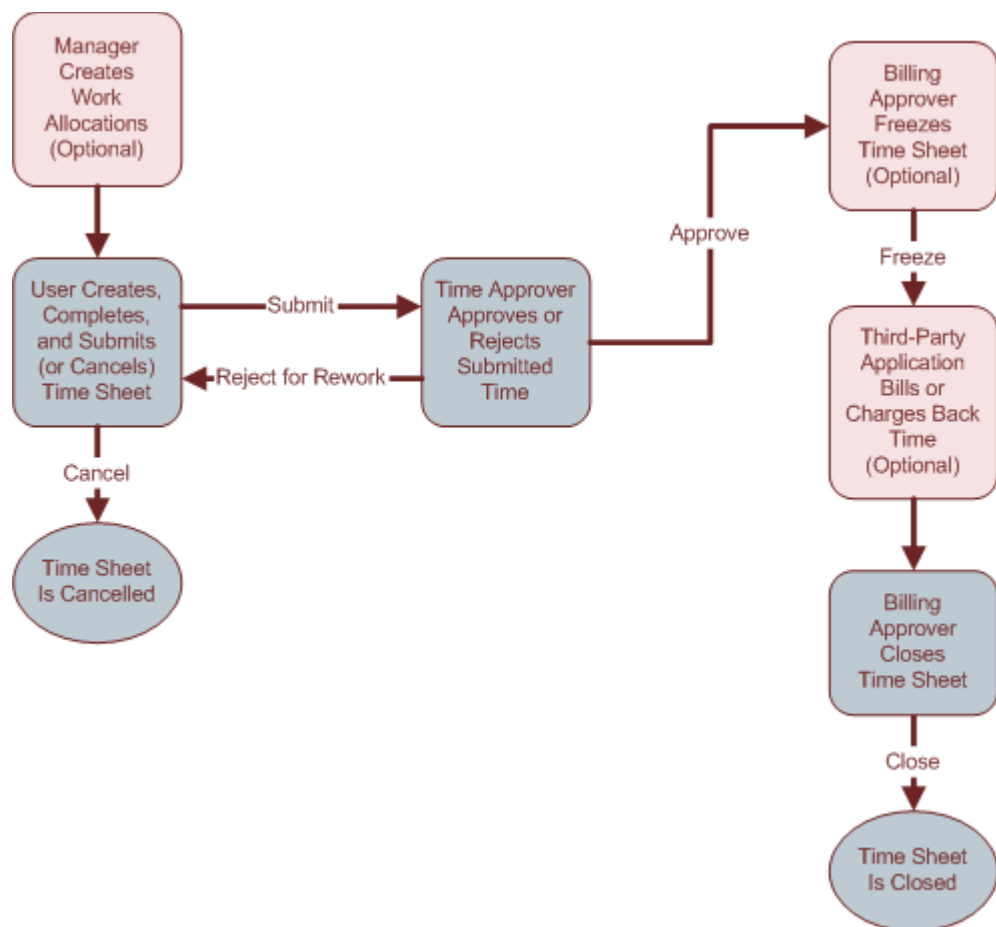
Chapter 1, *Getting Started with Mercury Time Management*, on page 11 (this chapter), provides an overview of the processing of time sheets, as well as introductions to using activities, work items, the My Tasks portlet, and integration with Mercury Project Management™. It also includes a list of other documents related to Mercury Time Management.

Overview of the Time Management Process

Mercury Time Management uses time sheets to streamline the time reporting and approval process. *Figure 1-1* illustrates the Mercury Time Management process, and subsequent sections outline the steps and the people involved in the process, and related information in this guide.

Many Mercury Time Management users only enter time sheet information, submit their time sheets for approval, and occasionally rework or cancel their time sheets.

Figure 1-1. Mercury Time Management process overview



Create Work Allocations

Depending on functional requirements, managers or planners can optionally create work allocations, one per work item, to specify:

- The amount of time to be spent on a particular work item.
- Which resources (users) are allowed to spend time on the work item.
- The charge code or codes (with percentages) against which the time can be billed. For information about configuring charge codes, see the *Mercury Time Management Configuration Guide*.

The work item must exist before its work allocation is created and specified.

[Chapter 5, *Creating Work Allocations for Users*, on page 97](#), provides details about how managers or planners can create, edit, cancel, and delete work allocations.

Create, Complete, and Submit Time Sheets

As a Mercury Time Management user (also known as a resource), you create time sheets to specify which work items you worked on, how much time you spent on each one, and, if configured, what types of activities you performed on those work items. Each time sheet spans a predefined time period such as a particular week or month. Each work item on the time sheet is represented by one time sheet line. You submit completed time sheets for approval by designated approvers. Your manager or a specified delegate can also submit time sheets on your behalf.

An administrator assigns each user a time sheet policy, which controls many aspects of the creation and operation of time sheets, including such parameters as the time interval of each time sheet and whether users are sent reminders that their time sheets are due. See [Time Sheet Policies on page 72](#).

[Chapter 2, *Reporting Your Time*, on page 19](#), provides details about how to create, search, edit, submit, copy, print, and cancel time sheets, and revise their work items. It also describes how to use the My Tasks portlet, especially for projects that use integration between Mercury Time Management and Mercury Project Management.

Cancel Time Sheets

You (or your manager or delegate) can cancel your own time sheets. Only unsubmitted time sheets can be cancelled. Once a time sheet has been cancelled, it cannot be reopened or updated.

See [Cancelling a Time Sheet on page 69](#) for more information.

Approve Time

When you complete and submit a time sheet, its time sheet lines are sent to their designated time approver (or approvers) for review and approval. Once all the lines on a time sheet are approved, the time sheet moves forward in the process. If an approver rejects particular time sheet lines, you must rework them by, for example, correcting them and resubmitting the time sheet, or providing additional information or justification. [Chapter 3, *Reviewing and Approving Time*, on page 77](#), provides details about the approval process.

Depending on the time sheet policy, time you report can be approved automatically. Also, depending on the time sheet policy, you can be automatically notified when any of your submitted time is rejected. See [Time Sheet Policies on page 72](#).

Freeze Time Sheets

Even after a time sheet is approved, a period of time can be allowed for you to make and submit updates and for approvers to approve the time sheet again. However, at some point, a designated billing approver can optionally “freeze” the time sheet to prohibit further changes and allow reporting of the time sheet’s information or extraction of the information for a billing or financial system. When a time sheet has been frozen for sufficient time (or if it does not need to be frozen), the billing approver can “close” it.

[Chapter 4, *Freezing and Closing Time Sheets*, on page 91](#), provides details about freezing time sheets.

Bill or Charge with Third-Party Applications

After a billing approver freezes a time sheet, costs can be generated to bill an internal or external customer. While Mercury Time Management does not explicitly perform this billing function, it does create links between work items and charge codes. For information about configuring charge codes, see the *Mercury Time Management Configuration Guide*. Freezing a time sheet allows its time information to be extracted and sent to third-party financial applications.

Close Time Sheets

Once a time sheet has been approved or, if necessary, frozen for data extraction or other external use by a billing or financial system, the billing approver closes the time sheet, its status is updated, and final reports can be generated.

[Chapter 4, *Freezing and Closing Time Sheets*, on page 91](#), provides details about closing time sheets.

Using Activities to Categorize Time To Be Tracked

The Mercury Time Management administrator can configure a list of activities the organization uses to categorize work performed against a work item, such as design work or coding. (See *Using Work Items in Time Sheets and Work Allocations* on page 16.) Then, in addition to tracking the total time spent on a given work item, Mercury Time Management also tracks how much of the time was spent performing different activities. Activities can also be used to classify work as depreciable for financial accounting. (Administrators can require that activities be specified on time sheets for particular work item types, such as requests or packages.)

For detailed information about activities, see the *Mercury Time Management Configuration Guide*.

Using Work Items in Time Sheets and Work Allocations

Each work item has one of the following work item types:

- **Request.** A request in Mercury Demand Management™. For detailed information about requests, see the *Mercury Demand Management User's Guide*.
- **Package.** A package in Mercury Deployment Management™. For detailed information about packages, see the *Mercury Deployment Management User's Guide*.
- **Task.** A project task in Mercury Project Management. For detailed information about projects, see the *Mercury Project Management User's Guide*.
- **Miscellaneous.** A miscellaneous item in Mercury Time Management, such as meetings and vacations.

You select work items when you create and edit:

- Time sheets (see *Chapter 2, Reporting Your Time*, on page 19). On time sheets, you specify the amount of time you worked on particular work items. Each time sheet line (row) represents one work item.
- Work allocations (see *Chapter 5, Creating Work Allocations for Users*, on page 97).

Work items typically require significant time and effort from one or more resources, and span multiple steps of the process shown in [Figure 1-1 on page 13](#). For example, a work item might be adding functionality to software. For a project, this might include such tasks as the following:

- Initial design
- Design review and signoff
- Coding
- Testing
- Release

If you have the required access grants and if the project is configured to track time at the task level, you can track time at both the project level and the more granular task level.

Using the My Tasks Portlet and Project Integration

The My Tasks portlet, which is available on your Mercury IT Governance Center home page by default, can display estimated and actual work effort for your project tasks for a time sheet you select. From this portlet, you can open that time sheet or provide a breakdown (in hours per day, for example) of the time worked on each task over the same time period as the time sheet. Note that you can use this portlet to report time only for tasks, not for any other types of work items such as requests or packages.

If you use Mercury Project Management, you are probably already familiar with the My Tasks portlet. A project manager can integrate Mercury Time Management and Mercury Project Management on a project-by-project basis. If a project uses this integration capability, you report details of the time you worked on that project's tasks in Mercury Time Management time sheets or in the My Tasks portlet.

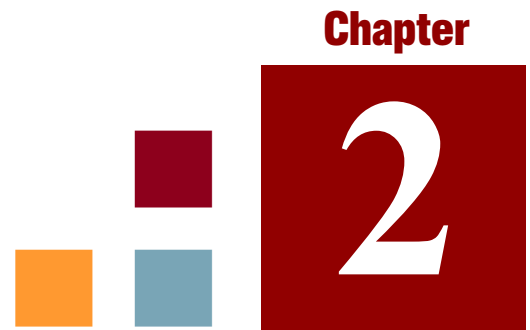
For more information about the My Tasks portlet and integration, see [Using the My Tasks Portlet on page 74](#) and [Integration of Mercury Time Management and Mercury Project Management on page 75](#).

If you are a project manager and you want to integrate Mercury Time Management and Mercury Project Management for a project, see [Chapter 6, Integrating Time Management and Project Management, on page 109](#).

Related Information

The following documents also include information related to Mercury Time Management:

- *Mercury Time Management Configuration Guide*
- *Mercury Demand Management User's Guide*
- *Mercury Deployment Management User's Guide*
- *Mercury Project Management User's Guide*
- *Mercury-Supplied Entities Guide* (includes descriptions of all Mercury Time Management portlets, reports, and request types)



Chapter
2

Reporting Your Time

In This Chapter:

- *Overview of Reporting Your Time*
- *Creating a Time Sheet*
- *Understanding Time Sheets and Time Sheet Lines*
- *Adding Work Items to a Time Sheet*
 - *Using the My Items List*
 - *Using the Suggested Items List*
 - *Adding Requests Directly to a Time Sheet*
 - *Adding Packages Directly to a Time Sheet*
 - *Adding Tasks Directly to a Time Sheet*
 - *Adding Miscellaneous Items Directly to a Time Sheet*
 - *Deleting Items (Lines) from a Time Sheet*
- *Reporting Time on the Time Breakdown Tab*
- *Completing the Project Fields Tab*
- *Displaying the Additional Information Tab*
- *Viewing and Specifying Time Sheet Line Details (Work Item Details)*
 - *Charge Codes/Activities Tab*
 - *Approvals/Transaction Details Tab*
 - *Notes Tab*
 - *User Data Tab*
- *Submitting a Time Sheet*
- *Time Sheet Approvals and Transaction Details*
- *Summary of Time Sheet and Time Sheet Line Statuses*
- *Searching Time Sheets*
- *Editing a Time Sheet*

- *Reworking Time Sheet Lines*
 - *Copying a Time Sheet*
 - *Cancelling a Time Sheet*
 - *Printing a Time Sheet*
 - *Viewing the Audit Trail*
 - *Time Sheet Policies*
 - *Using the My Tasks Portlet*
 - *Integration of Mercury Time Management and Mercury Project Management*
-

Overview of Reporting Your Time

As a Mercury Time Management user (resource), you use time sheets to report the work items of all types you worked on for a specific time period. You can also use the My Tasks portlet to report time you spent on project tasks.

This chapter focuses on how to create, complete, submit, and maintain time sheets. You can specify which work items you worked on during a given time period, how much time you spent on each one, and (potentially) what types of predefined activities you performed. Also, as described at the end of this chapter, data your report in the time sheets or the My Tasks portlet can be automatically synchronized.

Each work item is represented on the time sheet by a time sheet line, where you specify the how long you worked on that item. Depending on the configuration of Mercury Time Management, you can (or might be required to) specify the type of activity performed for the work item, such as coding or writing test scripts.

When you complete the time sheet, you submit it for approval in its entirety (that is, you do not submit individual lines). For details about the approval process from the approver's perspective, see [Chapter 3, *Reviewing and Approving Time*](#), on page 77.

To understand time sheets and time sheet lines, also consider the following:

- The lines in a time sheet can have different approvers.
- An approver sees only the time, that is, the time sheet lines, that approver is authorized to approve.
- Each time sheet line has a status, and each time sheet has a status. The time sheet line statuses and time sheet status are interrelated. They are described where appropriate throughout this guide, and they are particularly useful during the time sheet submission and approval processes. For a summary, see *Summary of Time Sheet and Time Sheet Line Statuses on page 63*.

As described in subsequent sections of this chapter, you can take the following actions in working with time sheets:

- Create a time sheet.
Newly created time sheets have a status of Unsubmitted.
- Add time sheet lines that reflect the work items you worked on.
New time sheet lines have a status of Unsubmitted.
- Use the **Time Breakdown** tab to specify how long you worked on each item.
- Complete the **Project Fields** and **Additional Information** tabs as needed.
- Complete time sheet line details as needed.
- Remove time sheet lines from the time sheet.
- Submit the time sheet so that approvers can approve or reject its lines.
All of a submitted time sheet's lines have a status of Submitted and the time sheet has a status of Pending Approval.
- For a submitted time sheet, initiate rework of particular time sheet lines before the approver approves or rejects them.
The status of such time sheet lines becomes Unsubmitted.
- Review a time sheet if an approver rejected at least one of its lines.
Rejected lines have a status of Rejected and the time sheet has a status of In Rework.

- Rework items that approvers rejected and update the corresponding time sheet lines accordingly.

The time sheet lines that you indicate on the time sheet you are reworking become Unsubmitted. If all lines on the time sheet become Unsubmitted in this manner, the time sheet status changes from In Rework to Unsubmitted.

- Resubmit the time sheet whose items you have reworked.

The status of all of the time sheet's lines becomes Submitted again and the time sheet status becomes Pending Approval again.

- Cancel a time sheet. Cancelling a time sheet cannot be reversed.

The cancelled time sheet has a status of Cancelled, and all of its lines are deleted.

- Print a time sheet.

- View a time sheet's audit trail of events.

Creating a Time Sheet



An administrator assigns each user a time sheet policy, which controls a number of aspects of time sheet creation and operation. For more information, see [Time Sheet Policies on page 72](#).

To create a time sheet:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Time Management > Time Sheets > Create a Time Sheet**.


The Create Time Sheet page appears. The **Include Items from My Last Time Sheet** checkbox and its subordinate options appear only if you created a time sheet for the most recent previous time period.



Suppose you did not create a time sheet for the most recent previous time period but you did create a time sheet for some earlier time period (in other words, there is a gap in your time sheets). To carry forward work items from that time sheet to your new time sheets, create the time sheets for the gap, from the oldest time period through the current time period in sequence, and include items from the previous time period in each new time sheet.

Create Time Sheet

*Time Period: 9/16/06 - 9/30/06

*Resource: David Jones 

*Description: David Jones - 9/16/06 - 9/30/06

Include Items from My Last Time Sheet

Time Period: 9/01/06 - 9/15/06

Time Sheet #1 (David Jones - 9/01/06 - 9/15/06)

Include Closed Items



Note

If the applicable time sheet policy allows only one time sheet for the combination of **Time Period** and **Resource** you specify, and one already exists, a warning is displayed as in [Figure 2-13 on page 73](#).

3. Complete the fields as specified in the following table.

Field Name (*Required)	Description
*Time Period	The time period for the new time sheet. The default is the current time period.
*Resource	By default, your username. If you are a resource's manager or delegate (see Delegation on page 79), you can select that resource's name from the list that appears when you click the icon for this field.
*Description	A description of the time sheet. By default, this is the Resource , followed by a hyphen (-), followed by the Time Period .
Include Items from My Last Time Sheet	Whether or not to include, from the time sheet for the most recent previous time period, items that can still have time logged against them on the new time sheet. If there is no time sheet for the most recent previous time period, this option and its subordinate options, described below, do not appear.
Time Sheet #<number> (<last time sheet Description, linked to that time sheet>)	From the last time period, the time sheet that has items to be included in the new time sheet. If you have multiple time sheets from the last time period, they are listed for you to select one.
Include Closed Items	Whether or not closed work items from the last time sheet are to be included in the new time sheet. Closed work items are: <ul style="list-style-type: none"> ■ Requests that are closed ■ Tasks that are complete and whose projects still allow time to be logged ■ Packages that are closed

4. Click **Create**.

The time sheet is created and the Edit Time Sheet page appears. The title of this page has the format:

Resource - Time Sheet for Time Period (time sheet status)

In the **Time Sheet Details** section, the **Time Breakdown** tab is selected.

View Audit Trail Printable Version

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Unsubmitted)

Copy Time Sheet Cancel Time Sheet Save Cancel

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: David Jones - 9/16/06 - 9/30/06 Status: Unsubmitted

Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours) Time Breakdown Project Fields Additional Information

Add Items

Export Time Sheet

Notes

Add Notes

Save Cancel

Before you add work items to the time sheet, Mercury recommends that you read the section *Understanding Time Sheets and Time Sheet Lines* on page 25 to familiarize yourself with the layout, buttons, tabs, and links of a completed time sheet that is ready to submit for approval.

Understanding Time Sheets and Time Sheet Lines

The purpose of this section is to familiarize you with the layout and content of a time sheet that is ready to submit for approval. *Figure 2-1* shows an example time sheet (Edit Time Sheet page) to which a number of lines (work items) have been added. The procedures for adding lines, reporting time, specifying other required data, and submitting a time sheet for approval are described in subsequent sections.

Figure 2-1. Example time sheet

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Unsubmitted)

Copy Time Sheet Cancel Time Sheet Save Submit Cancel

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: David Jones - 9/16/06 - 9/30/06 Status: Unsubmitted

Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)									
Item	Status	Activity	Expected Hours	Time Sheet Total	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20
Whirlwind									
<input type="checkbox"/> Design Approval (Whirlwind)	Unsubmitted	Design	16.0	11.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Write Design Specs (Whirlwind)	Unsubmitted	Design	24.0	21.00	0.00	0.00	7.00	6.00	0.00
PFM - Proposal									
<input type="checkbox"/> Req:30001:Upgrade DB version	Unsubmitted		0.0	11.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Req:30004:Implement IT Gove...	Unsubmitted		0.0	16.00	0.00	0.00	0.00	0.00	0.00
Project Issue									
<input type="checkbox"/> Req:30218:Usability testing	Unsubmitted		0.0	4.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous									
<input type="checkbox"/> Meetings	Unsubmitted		0.0	5.00	0.00	0.00	1.00	2.00	0.00
Line Actions:				Total: 68.00	0.00	0.00	8.00	8.00	0.00

Line Details Remove Rework

Add Items

Export Time Sheet

Notes Add Notes

Save Submit Cancel

The title of the time sheet has the format:

Resource - Time Sheet for Time Period (time sheet status)

Below the title and above the tabs of the **Time Sheet Details** section, the time sheet displays the basic fields, buttons, and links described in *Table 2-1*.

Table 2-1. Basic time sheet fields, buttons, and links (page 1 of 2)

Field (*Required), Button, or Link	Description
View Audit Trail link	See Viewing the Audit Trail on page 71 .
Printable Version link	See Printing a Time Sheet on page 70 .
Copy Time Sheet button	See Copying a Time Sheet on page 68 .
Cancel Time Sheet button	See Cancelling a Time Sheet on page 69 .
Save button (also at bottom of time sheet)	Saves the edits made to the time sheet.
Submit button (also at bottom of time sheet)	Submits this time sheet. (Button appears only when the time sheet has at least one time sheet line.)
Done button	Saves the time sheet and returns to the previous screen. (Button replaces the Submit button when a time sheet is submitted.)
Cancel button (also at bottom of time sheet)	Cancel the edits made to the time sheet.
Resource	(Read-only) The person for whom the time sheet was created. See Creating a Time Sheet on page 22 .
Time Period	(Read-only) See Creating a Time Sheet on page 22 .
Time Sheet #	(Read-only) A sequence number that is automatically assigned to the time sheet. It is usually 1 . However, it can be greater than 1 if the resource is allowed to create more than one time sheet per time period. Also, if a time sheet for this resource and time period was previously created and cancelled, this number is incremented.
*Description	The time sheet's description, which can be modified for a created time sheet. See Creating a Time Sheet on page 22 .

Table 2-1. Basic time sheet fields, buttons, and links (page 2 of 2)

Field (*Required), Button, or Link	Description
Status	(Read-only) The current status of this time sheet. For summary information about time sheet statuses, see Summary of Time Sheet and Time Sheet Line Statuses on page 63.
Approvals/Transaction Details button	See Time Sheet Approvals and Transaction Details on page 61.
Time Sheet Policies	Click the arrow at the left end of this button to display a summary of the policy requirements enforced for this time sheet. If a Warning icon appears next to a work item or on the right side of the button, the requirements that are not met are shown in bold. See Time Sheet Policies on page 72.

The **Time Sheet Details** section has the following tabs:

- The **Time Breakdown** tab (selected by default), as shown in [Figure 2-1](#) and described in [Reporting Time on the Time Breakdown Tab](#) on page 50, which also describes how the work items are organized on the time sheet.
- The **Project Fields** tab (see [Completing the Project Fields Tab](#) on page 53).
- If time sheet line user data has been configured for you to specify, the **Additional Information** tab displaying this user data for the entire time sheet (see [Displaying the Additional Information Tab](#) on page 55).

In addition, the columns, buttons and link described in [Table 2-2](#) appear within the **Time Sheet Details** section, no matter which of its tabs is selected.

Table 2-2. Columns, buttons, and link on all Time Sheet Details tabs

Column, Button, or Link	Description
Item column	The names and truncated Descriptions of each item (work item).
Status column	The status of each item (time sheet line). For summary information about time sheet line statuses, see Summary of Time Sheet and Time Sheet Line Statuses on page 63 .
Activity column	The activities for their parent items. One item can be broken down into multiple activities, displayed one per line. This allows you to enter time worked for each activity of the item. See Using Activities to Categorize Time To Be Tracked on page 16 .
Line Details button (under the Line Actions: heading)	Opens the Work Item Details window for the selected time sheet line (work item). This window includes the tabs described in Viewing and Specifying Time Sheet Line Details (Work Item Details) on page 56 . (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when one time sheet line is selected in the checkboxes of the left-most column.)
Remove button (under the Line Actions: heading)	Removes the selected time sheet lines from the time sheet. (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when at least one unsubmitted time sheet line is selected in the checkboxes of the left-most column.)
Rework button (under the Line Actions: heading)	Allows rework of the selected time sheet lines (work items), changing their status to Unsubmitted. For more information, see Reworking Time Sheet Lines on page 67 . (Button appears only when the time sheet has at least one time sheet line, and it is enabled only when at least one submitted time sheet line of a previously submitted time sheet is selected in the checkboxes of the left-most column.)
Add Items button	Provides options to add a work item to the time sheet. See step on page 29 in the section Creating a Time Sheet .
Export Time Sheet link	Exports the time sheet to a Microsoft Excel worksheet.

Finally, a **Notes** section appears at the bottom of the time sheet. Clicking its **Add Notes** button allows you to add text notes to the time sheet.

Adding Work Items to a Time Sheet

To add any work items (time sheet lines) to the time sheet in order to log time against them:

1. Click **Add Items**.

The screenshot displays the Mercury Time Management interface for a time sheet. At the top, it shows the user's name and the time sheet title: "David Jones - Time Sheet for 9/11/06 - 9/24/06 (Unsubmitted)". There are buttons for "Copy Time Sheet", "Cancel Time Sheet", "Save", and "Cancel". Below this, the "Resource" is set to "David Jones", the "Time Period" is "9/11/06 to 9/24/06", and the "Time Sheet #:" is "1". The "Description" field contains "David Jones - 9/11/06 - 9/24/06" and the "Status" is "Unsubmitted". There is a "Time Sheet Policies" link. A tabbed interface shows "Time Sheet Details (All times shown in hours)" as the active tab, with other tabs for "Time Breakdown", "Project Fields", and "Additional Information". The "Add Items" dropdown menu is open, showing the following options: "Add from My Items / Suggested Items", "Add Request", "Add Package", "Add Task", and "Add Miscellaneous". At the bottom right, there are "Save" and "Cancel" buttons.

The following list of options appears for adding items to the time sheet:

- **Add from My Items / Suggested Items.** This option adds work items from the My Items list or the Suggested Items list. The My Items list is a personal list of items you build and maintain, and it is retained time period after time period. The Suggested Items list is automatically generated by Mercury Time Management for your convenience. (See *Using the My Items List* on page 30 and *Using the Suggested Items List* on page 39.)
- **Add Request.** See *Adding Requests Directly to a Time Sheet* on page 41.
- **Add Package.** See *Adding Packages Directly to a Time Sheet* on page 43.
- **Add Task.** See *Adding Tasks Directly to a Time Sheet* on page 44.
- **Add Miscellaneous.** This option is used for vacation, meetings, and other items. See *Adding Miscellaneous Items Directly to a Time Sheet* on page 49.

If you select any of the last four options to add an item directly to the time sheet, after you select the type of item to add—request, package, task, or miscellaneous—the corresponding Add <item type> to Time Sheet window appears. Its fields serve as filter criteria when you add requests, packages,

or tasks. You specify these criteria as desired to select which subset of the available items of that type are to be listed for you to potentially add to the time sheet. The fields for adding each type of item are described in the sections referenced above.

Repeat this step as needed to add all the items of interest to the time sheet.

When you add at least one line to the time sheet, the **Submit** button appears, to allow you to submit the time sheet.

If a Warning icon appears next to a work item or on the right side of the **Time Sheet Policies** button, click the arrow at the left end of the **Time Sheet Policies** button to display a summary of the policy requirements. Requirements that are not met are shown in bold. For example, certain work items might require that you specify their activities or their charge codes; to do so, select one item, click **Line Details**, and complete the **Charge Codes/Activities** tab.

For a description of the time sheet and its lines, see *Understanding Time Sheets and Time Sheet Lines* on page 25.

2. Click **Save** to save the time sheet.

Using the My Items List

The My Items list is a list of items that you create and maintain for your convenience on the **My Items** tab. Unless you delete them, items in the My Items list remain available to add to all subsequent time sheets.

The following sections describe how to build the My Items list from the entire set of work items you can access, how to delete items from the list, and how to add items from the My Items list to a time sheet.

Also, to learn about the Suggested Items list, which Mercury Time Management generates for you, see *Using the Suggested Items List* on page 39, and to add items from the Suggested Items list to the My Items list, see *Adding Items from the Suggested Items List to the My Items List* on page 40.

Adding Items to the My Items List

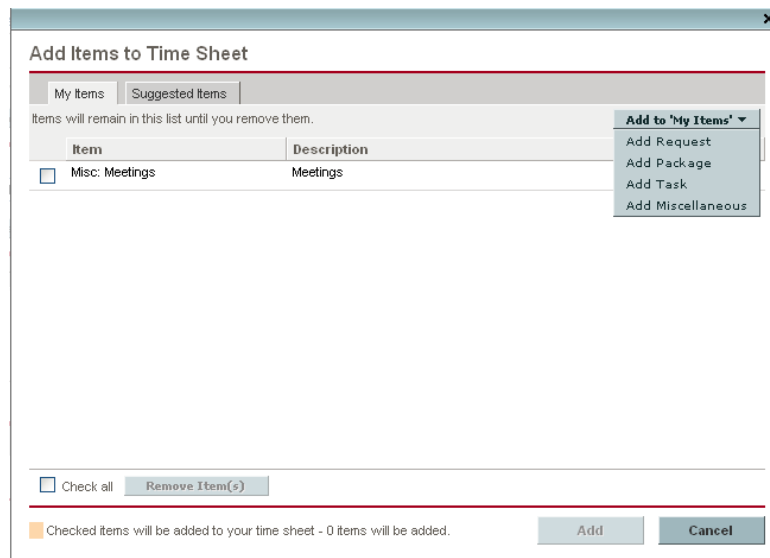
You can add items to the My Items list whether or not they are in the Suggested Items list. (To add items from the Suggested Items list to the My Items list, see [Adding Items from the Suggested Items List to the My Items List on page 40](#).)

To add items to the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items**.

The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click **Add to 'My Items'**.



The following list of options appears for adding items to the My Items list:

- **Add Request.** See [Adding Requests to the My Items List on page 32](#).
- **Add Package.** See [Adding Packages to the My Items List on page 33](#).
- **Add Task.** See [Adding Tasks to the My Items List on page 35](#).
- **Add Miscellaneous.** This option is used for vacation, meetings, and other. See [Adding Miscellaneous Items to the My Items List on page 37](#).

After you select the type of item to add—request, package, task, or miscellaneous—the corresponding Add *<item type>* to 'My Items' window appears. Its fields serve as filter criteria when you add requests, packages, or tasks. You specify these criteria as desired to select which subset of the available items of that type are to be listed for you to potentially add to the My Items list. The fields for adding each type of item are described in the sections referenced above.

Add the items of interest to the My Items list and repeat this step as needed to add other items.

Adding Requests to the My Items List

To add requests to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Request**.

2. Complete the filter fields as described in the table below.

Field Name	Description
Request Filters section	
Request Type	Limits the list of requests to those with the set of request types you specify.
Request Assigned To	Limits the list of requests to those assigned to the set of users you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.
General Filters section	
Modified in Last x days	Limits the list of requests to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of requests to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed requests in the list of requests.

Field Name	Description
Search based on filter criteria specified above	
Find Requests to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of requests that appears, click the ones in the Available column that you want to add to the My Items list, and click OK to add them to the text box for this field.

- Click the auto-complete icon to the right of the text box for the **Find Requests to add to 'My Items'** field.

The requests that meet your filter criteria are listed in the **Available** column in a new window.

- Click the specific desired requests in the **Available** column.

The requests you select move to the **Selected** column.

- Click **OK** to return to the Add Requests to 'My Items' window.

The requests you selected appear in the text box for the **Find Requests to add to 'My Items'** field.

- Click **Add** to add the requests to the My Items list.

Adding Packages to the My Items List

To add packages to the My Items list:

- From the **Add to 'My Items'** button, click **Add Package**.

The screenshot shows a dialog box titled "Add Packages to 'My Items'". It contains several filter sections:

- Package Filters:**
 - Package Workflow: [Text Box]
 - Package Assigned Group: [Text Box]
 - Package Assigned To: [Text Box]
- General Filters:**
 - Modified in Last x Days: [Text Box]
 - Created in Last x Days: [Text Box]
 - Include Closed?: Yes No

At the bottom, there is a text box labeled "Find Packages to add to 'My Items':" with an auto-complete icon to its right. Below this text box are "Add" and "Cancel" buttons.

2. Complete the filter fields as described in the table below.

Field Name	Description
Package Filters section	
Package Workflow	Limits the list of packages to those with the set of workflows you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the set of users you specify.
General Filters section	
Modified in Last x days	Limits the list of packages to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of packages to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed packages in the list of packages.
Search based on filter criteria specified above	
Find Packages to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of packages that appears, click the ones in the Available column that you want to add to the My Items list, and click OK to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Packages to add to 'My Items'** field.

The packages that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired packages in the **Available** column.

The packages you select move to the **Selected** column.

5. Click **OK** to return to the Add Packages to 'My Items' window.

The packages you selected appear in the text box for the **Find Packages to add to 'My Items'** field.

6. Click **Add** to add the packages to the My Items list.

Adding Tasks to the My Items List

As with adding other work item types to the My Items list, adding tasks involves specifying filter criteria. However, when you add tasks to the My Items list, Mercury Time Management displays only the projects, summary tasks, and tasks for which you are allowed to log time.

The section *Tasks for Which You Can Log Time* on page 45 explains which of a project's summary tasks and tasks Mercury Time Management makes available for you to apply filter criteria; the information in that section can help project managers understand which tasks are available to which resources. If you only create and submit time sheets, you probably do not need to understand this detail, and you can continue with this procedure to add tasks to the My Items list.



Note

If you do not see work items for which you think you should be able to log time, contact the project manager.

To add tasks to the My Items list:

1. From the **Add to 'My Items'** button, click **Add Task**.

2. Complete the filter fields as described in the table below.

Field Name	Description
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to tasks or to summary tasks, or displays both.
Task Status	Limits the list to tasks of a particular status.
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
General Filters section (if necessary, scroll down to view)	
Modified in Last x days	Limits the list of work items to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of work items to those that were created within the number of days you specify.
Include Closed	Indicates whether to include tasks that are complete and whose projects still allow time to be logged.
Search based on filter criteria specified above	
Find Tasks to add to 'My Items'	Applies your filter criteria when you click the auto-complete icon on the right. From the list of tasks that appears, click the ones in the Available column that you want to add to the My Items list, and click OK to add them to the text box for this field.

- Click the auto-complete icon to the right of the text box for the **Find Tasks to add to 'My Items'** field.

The tasks that meet your filter criteria are listed in the **Available** column in a new window.

- Click the specific desired tasks in the **Available** column.

The tasks you select move to the **Selected** column.

- Click **OK** to return to the Add Tasks to 'My Items' window.

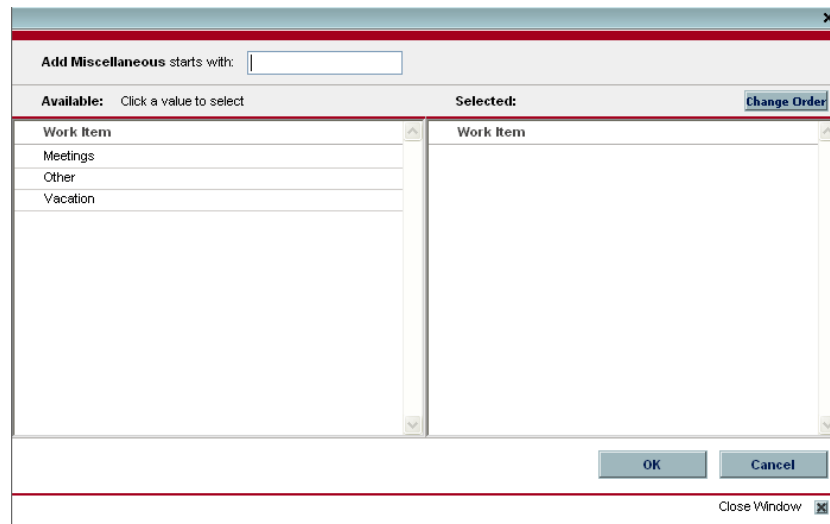
The tasks you selected appear in the text box for the **Find Tasks to add to 'My Items'** field.

- Click **Add** to add the tasks to the My Items list.

Adding Miscellaneous Items to the My Items List

To add miscellaneous items to the My Items list:

- From the **Add to 'My Items'** button, click **Add Miscellaneous**.



- (Optional) In the **Add Miscellaneous starts with** field, specify the starting letters of the items you want to access.

- Click the specific items of interest in the list that appears.

The items move from the **Available** column to the **Selected** column.

- Click **OK** to add the selected miscellaneous items to the My Items list.

Deleting Items from the My Items List

To delete items from the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items**.

The Add Items to Time Sheet window opens to the **My Items** tab.

2. Select the checkboxes next to the items you want to delete, or select the **Check all** checkbox.
3. Click **Remove Item(s)**.

Adding Items from the My Items List to a Time Sheet

To add items from the My Items list to a time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items**.

The Add Items to Time Sheet window opens to the **My Items** tab.

2. Select the checkboxes of the items you want to add to the time sheet and click **Add** at the bottom of the window.

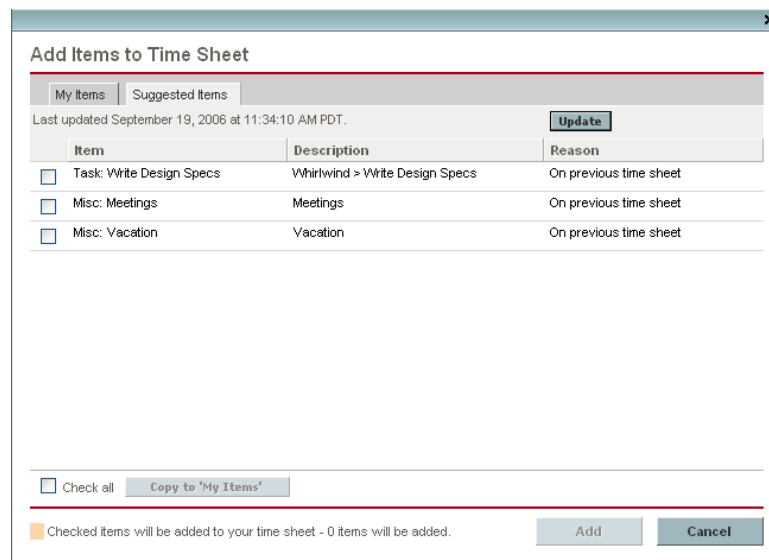
The items are added to the time sheet (but they are not duplicated if they are already on the time sheet). The items also remain in the My Items list.

For more information about items you have added to the time sheet and to add other items, continue with [step on page 29](#).

Using the Suggested Items List

To help you add appropriate items to your time sheets, Mercury Time Management automatically generates the Suggested Items list and presents it on the **Suggested Items** tab, as in the example in *Figure 2-2*.

Figure 2-2. Example Suggested Items list



By default, the Suggested Items list includes the following items, excluding any that are already on the time sheet:

- Work items of any type
 - That are on your time sheet from the previous time period
 - and*
 - That you can still log time against (because they are not closed)
- Project tasks
 - That are assigned to you
 - and*
 - That can have time logged against them during this time sheet's time period, which are the tasks with a status of either:
 - Ready, with a scheduled start-to-finish date range that overlaps at least part of the time sheet's time period
 - or*
 - In Progress

The **Suggested Items** tab states when the Suggested Items list was last updated. To ensure that the Suggested Items list is up to date, click **Update**.

In addition to the **Item** and **Description** columns, the Suggested Items list includes a **Reason** column that indicates why the item was included in the list.

Adding Items from the Suggested Items List to a Time Sheet

To add items from the Suggested Items list to a time sheet:

1. If you have not already done so, on the time sheet, click the **Add Items** button and then click **Add from My Items / Suggested Items**.

The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click the **Suggested Items** tab.
3. Select the checkboxes next to the items you want to add to the time sheet, or select the **Check all** checkbox.
4. Click **Add**.

When the items are added to the time sheet, they are removed from the Suggested Items list.

5. For more information about items you have added to the time sheet and to add other items, continue with [step on page 29](#).

Adding Items from the Suggested Items List to the My Items List

The My Items list is a list of items that you create and maintain for your convenience on the **My Items** tab. Unless you delete them, items in the My Items list remain available to add to all subsequent time sheets. For more information, see [Using the My Items List on page 30](#).

To add items from the Suggested Items list to the My Items list:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add from My Items / Suggested Items**.

The Add Items to Time Sheet window opens to the **My Items** tab.

2. Click the **Suggested Items** tab.
3. Select the checkboxes next to the items you want to copy to the My Items list, or select the **Check all** checkbox.
4. Click **Copy to 'My Items'**.

After the items are copied to the My Items list, they remain in the Suggested Items list.

Adding Requests Directly to a Time Sheet

To add requests to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Request**.

The Add Requests to Time Sheet window opens.

Add Requests to Time Sheet

Request Filters

Request Type:

Request Assigned To: Request Assigned Group:

General Filters

Modified in Last x Days: Created in Last x Days:

Include Closed? Yes No

Click the button below to find Requests that meet the filter criteria above. Then select Requests to add to Time Sheet.

Find Requests to add to Time Sheet:

Add Cancel

2. Complete the filter fields as described in the table below.

Field Name	Description
Request Filters section	
Request Type	Limits the list of requests to those with the set of request types you specify.
Request Assigned To	Limits the list of requests to those assigned to the set of users you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.
General Filters section	
Modified in Last x days	Limits the list of requests to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of requests to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed requests in the list of requests.
Search based on filter criteria specified above	
Find Requests to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of requests that appears, click the ones in the Available column that you want to add to the time sheet, and click OK to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Requests to add to Time Sheet** field.

The requests that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired requests in the **Available** column.

The requests you select move to the **Selected** column.

5. Click **OK** to return to the Add Requests to Time Sheet window.

The requests you selected appear in the text box for the **Find Requests to add to Time Sheet** field.

6. Click **Add** to add the requests to the time sheet.

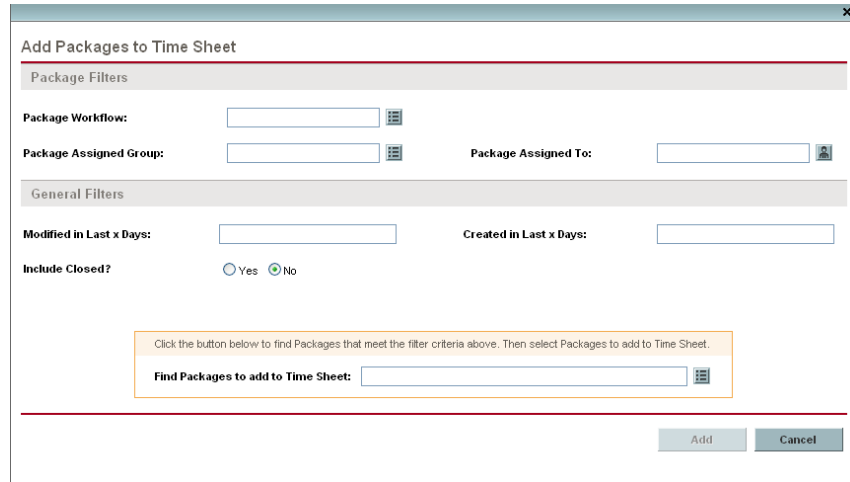
7. For more information about items you have added to the time sheet and to add other items, continue with [step 1 on page 29](#).

Adding Packages Directly to a Time Sheet

To add packages to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Package**.

The Add Packages to Time Sheet window opens.



2. Complete the filter fields as described in the table below.

Field Name	Description
Package Filters section	
Package Workflow	Limits the list of packages to those with the set of workflows you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the set of users you specify.
General Filters section	
Modified in Last x days	Limits the list of packages to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of packages to those that were created within the number of days you specify.
Include Closed	Indicates whether to include closed packages in the list of packages.

Field Name	Description
Search based on filter criteria specified above	
Find Packages to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of packages that appears, click the ones in the Available column that you want to add to the time sheet, and click OK to add them to the text box for this field.

3. Click the auto-complete icon to the right of the text box for the **Find Packages to add to Time Sheet** field.

The packages that meet your filter criteria are listed in the **Available** column in a new window.

4. Click the specific desired packages in the **Available** column.

The packages you select move to the **Selected** column.

5. Click **OK** to return to the Add Packages to Time Sheet window.

The packages you selected appear in the text box for the **Find Packages to add to Time Sheet** field.

6. Click **Add** to add the packages to the time sheet.

7. For more information about items you have added to the time sheet and to add other items, continue with [step 1 on page 29](#).

Adding Tasks Directly to a Time Sheet

As with adding other work item types to a time sheet, adding tasks involves specifying filter criteria. However, when you add tasks to the time sheet, Mercury Time Management displays only the projects, summary tasks, and tasks for which you are allowed to log time.

The section [Tasks for Which You Can Log Time on page 45](#) explains which of a project's summary tasks and tasks Mercury Time Management makes available for you to apply filter criteria; the information in that section can help project managers understand which tasks are available to which resources. If you only create and submit time sheets, you probably do not need to understand this detail, and you can continue with the procedure [Adding Tasks to the Time Sheet on page 47](#).



Note

If you do not see work items for which you think you should be able to log time, contact the project manager.

Tasks for Which You Can Log Time

This section provides detailed information about how Mercury Time Management automatically limits which summary tasks and which tasks you can view and then add to your My Items list or directly to a time sheet. If you are completing a time sheet, you probably do not need to understand this detail, and you can proceed to add tasks to your My Items list (see *Adding Tasks to the My Items List on page 35*) or to your time sheet (see *Adding Tasks to the Time Sheet on page 47*). Project managers may find this information useful in understanding which tasks are available to which resources, and they can configure the applicable settings as described in *Chapter 6, Integrating Time Management and Project Management, on page 109*.

The set of tasks you can view and add to a time sheet is based on a combination of the following settings in the parent project:

- The level at which the project tracks time. The options are:
 - **Task level**
 - **Summary tasks at hierarchy level (2 to 7)**
 - **Project level**
- Who is allowed to log time for the project. The options are:
 - **Project resources.** Resources assigned to tasks, resources in the staffing profile, and summary task owners can log time against any task in the project.
 - **Assigned resources.** When time is tracked at the **Task level**, resources who are assigned to the task can log time against it. When time is tracked at **Summary tasks at hierarchy level <X>**, resources who are assigned to tasks at any level under that summary task level <X> can log time against it. This is the default option.
 - **All resources.** All resources who can see the project can log time against any task in the project.

For example, suppose project PROJ includes:

- Phase 1, a level-2 summary task that includes the following tasks:
 - Develop, which is assigned to resource User1
 - Test, which is unassigned
- Phase 2, a level-2 summary task that includes the following summary task:
 - Sub-Phase A, a level-3 summary task that includes the following task:
 - Deploy, which is assigned to resource User2

The entries in *Table 2-3* show the project, summary tasks, and tasks for which User1 and User2 can log time, depending on the combination of project settings that specify the level at which time is tracked on project PROJ and who is allowed to log time on project PROJ. In this example:

- If time is tracked for the project at summary task level 3, and if all resources are allowed to log time for it, then everyone logs time on Sub-Phase A, which is the only level-3 summary task.
- If time is tracked for the project at summary task level 3, and if only assigned resource User1 is allowed to log time for the project, then User1 cannot log any time because the only task to which User1 is assigned, namely Develop, is not under a level-3 summary task.
- If time is tracked for the project at summary task level 3, and if only assigned resource User2 is allowed to log time for the project, then User2 can log time only on Sub-Phase A.
- If time is tracked at the task level, and if only assigned resource User2 is allowed to log time for the project, then User2 can log time on only the Deploy task, to which he is assigned.

Table 2-3. Example: project, summary tasks, and tasks for which resources can log time

		Level at Which Time Is Tracked on PROJ				
		Project Level	Summary Task Level 2	Summary Task Level 3	Task Level	
Who Is Allowed to Log Time for PROJ	All resources who can view PROJ (including User1 and User2)	PROJ	Phase 1, Phase 2	Sub-Phase A	Develop, Test, Deploy	
	All project resources for PROJ (including User1 and User2)	PROJ	Phase 1, Phase 2	Sub-Phase A	Develop, Test, Deploy	
	Assigned resource	User1	PROJ	Phase 1		Develop
		User2	PROJ	Phase 2	Sub-Phase A	Deploy

Adding Tasks to the Time Sheet

To add tasks to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Task**.

The Add Tasks to Time Sheet window opens.

2. Complete the filter fields as described in the table below.

Field Name	Description
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to tasks or to summary tasks, or displays both.
Task Status	Limits the list to tasks of a particular status.
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.

Field Name	Description
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
General Filters section (if necessary, scroll down to view)	
Modified in Last x days	Limits the list of items to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of items to those that were created within the number of days you specify.
Include Closed	Indicates whether to include tasks that are complete and whose projects still allow time to be logged.
Search based on filter criteria specified above	
Find Tasks to add to Time Sheet	Applies your filter criteria when you click the auto-complete icon on the right. From the list of tasks that appears, click the ones in the Available column that you want to add to the time sheet, and click OK to add them to the text box for this field.

- Click the auto-complete icon to the right of the text box for the **Find Tasks to add to Time Sheet** field.

The tasks that meet your filter criteria are listed in the **Available** column in a new window.

- Click the specific desired tasks in the **Available** column.

The tasks you select move to the **Selected** column.

- Click **OK** to return to the Add Tasks to Time Sheet window.

The tasks you selected appear in the text box for the **Find Tasks to add to Time Sheet** field.

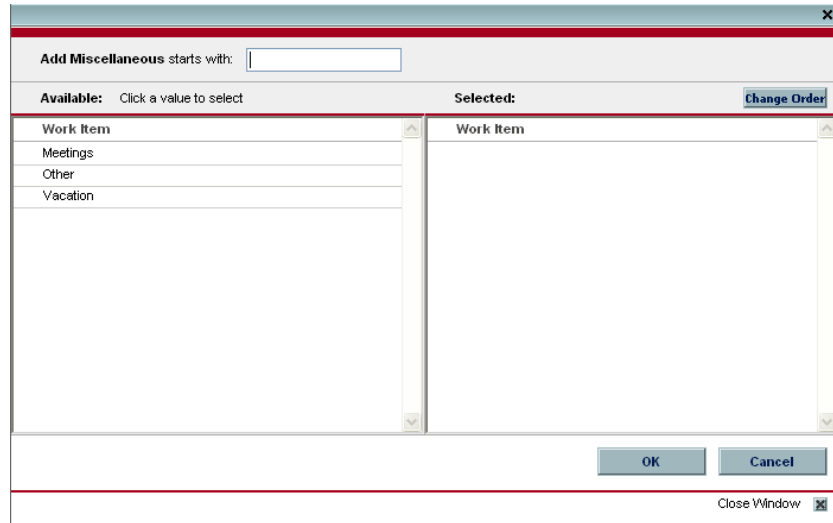
- Click **Add** to add the tasks to the time sheet.

- For more information about items you have added to the time sheet and to add other items, continue with [step 1 on page 29](#).

Adding Miscellaneous Items Directly to a Time Sheet

To add miscellaneous items to the time sheet:

1. If you have not already done so, on the time sheet, click **Add Items** and then click **Add Miscellaneous**.



2. (Optional) In the **Add Miscellaneous starts with** field, specify the starting letters of the items you want to access.
3. Click the specific items of interest in the list that appears.
The items move from the **Available** column to the **Selected** column.
4. Click **OK** to add the selected miscellaneous items to the time sheet.
5. For more information about items you have added to the time sheet and to add other items, continue with [step 1 on page 29](#).

Deleting Items (Lines) from a Time Sheet

To delete a work item (time sheet line) from a time sheet:

1. If you have not already done so, search for and open the time sheet of interest. See [Searching Time Sheets on page 64](#). For an example of a time sheet that has been opened, see [Figure 2-1 on page 25](#).
2. Select the checkboxes to the left of the items you want to delete.
3. Under the **Line Actions** heading, click **Remove**.
4. Click **Save** to save the updated time sheet.

Reporting Time on the Time Breakdown Tab

Figure 2-3 shows an example of the **Time Breakdown** tab, where you report the time you worked on the time sheet's work items. This tab is displayed by default.

Figure 2-3. Example time sheet, Time Breakdown tab

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Unsubmitted)

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: David Jones - 9/16/06 - 9/30/06 Status: Unsubmitted

Time Sheet Details (All times shown in hours)		Time Breakdown	Project Fields	Additional Information	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20
Item	Status	Activity	Expected Hours	Time Sheet Total					
Whirlwind									
<input type="checkbox"/> Design Approval (Whirlwind)	Unsubmitted	Design	16.0	11.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Write Design Specs (Whirlwind)	Unsubmitted	Design	24.0	21.00	0.00	0.00	7.00	6.00	
PFM - Proposal									
<input type="checkbox"/> Req:30001:Upgrade DB version	Unsubmitted		0.0	11.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/> Req:30004:Implement IT Gove...	Unsubmitted		0.0	16.00	0.00	0.00	0.00	0.00	
Project Issue									
<input type="checkbox"/> Req:30218:Usability testing	Unsubmitted		0.0	4.00	0.00	0.00	0.00	0.00	
Miscellaneous									
<input type="checkbox"/> Meetings	Unsubmitted		0.0	5.00	0.00	0.00	1.00	2.00	
Line Actions:					Total: 68.00	0.00	0.00	8.00	8.00

Notes

The columns in the **Time Sheet Details** section of the **Time Breakdown** tab are described in Table 2-4. Except for the columns to enter time, they are read-only.

Table 2-4. Time Sheet Details, Time Breakdown tab fields

Field Name	Description
Item	The names and truncated Descriptions of each item (work item).
Status	The status of each item (time sheet line). For summary information about time sheet line statuses, see Summary of Time Sheet and Time Sheet Line Statuses on page 63 .
Activity	The activities for their parent items. One item can be broken down into multiple activities, displayed one per line. This allows you to enter time worked for each activity of the item. See Using Activities to Categorize Time To Be Tracked on page 16 .
Expected Hours	The number of hours specified in the associated work allocation or, for projects, the resource's scheduled effort.
Time Sheet Total	The total number of actual hours entered (in the columns to the right) for this item (row). This field is updated automatically as you make entries for individual dates or time periods in the columns to the right.
[Columns to enter time]	Your breakdown by day or time period of the actual time you worked on this item. (Use the horizontal scroll bar under these columns as needed.)
Total	The total number of actual hours entered (in the columns to the right) for this time sheet. This field is updated automatically as you make entries for individual items.

On the time sheet, the work items (time sheet lines) are logically organized in the following order, under headings as described:

- All tasks, grouped under the names of their specific projects
- All requests, grouped under the names of their specific request types
- All miscellaneous items, such as vacation and meetings, grouped under the heading **Miscellaneous**
- All packages, grouped under the names of their package workflows

For example, in [Figure 2-3](#):

- The heading **Whirlpool** is a particular project, and below it are two of its tasks.
- The headings **PFM - Proposal** and **Project Issue** are particular request types, and below them are specific requests of those types.
- The heading **Miscellaneous** includes the Meetings work item.

Individual items, each with a checkbox to the left and the fields described in *Table 2-4*, appear under the appropriate heading.

The number of columns you use to report time worked on the various work items and the way you enter time vary according to the period type and the method of time entry specified in the time sheet policy the administrator has assigned to you.

The period type can be:

- Weekly
- Bi-weekly (exactly two weeks)
- Semi-monthly (with two time periods per month—the first from the 1st through the 15th of a month, and the second from the 16th through the end of a month, as in the example in *Figure 2-3*)
- Monthly

You report time in the boxes in the column or columns in one of the following ways:

- By the number of hours you worked on each work item each day (as in the example in *Figure 2-3*). There is one column for each day of the time period, and the number of columns depends on the period type as described above (7 for weekly, 14 for bi-weekly, and so on).
- By the total number of hours you worked on each work item over the entire time period. There is only one column to enter time in hours for the entire time period.
- By the percentages of time you worked on each work item over the entire time period. There is only one column to enter a percentage of the entire time period's time for each work item. For this option, the administrator can configure Mercury Time Management so that each time period has a fixed number of total hours, or each time period has a fixed number of hours each workday multiplied by the variable number of workdays per time period. From the percentages you enter, Mercury Time Management calculates hours for the time period.

For example, suppose that the time period is monthly; you enter time in percentage over the entire time period; the amount of time in the time period is specified to vary by the number of workdays, with eight hours a day; and you create a time sheet for a month that has 22 working days. If you enter 10 percent for the work item of Meetings, Mercury Time Management will display and report that time for Meetings as 10% of 22 days * 8 hours/day, or 17.60 hours.

Completing the Project Fields Tab

Figure 2-4 shows an example of the **Project Fields** tab of the Edit Time Sheet page.

Figure 2-4. Example time sheet, Project Fields tab

View Audit Trail Printable Version

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Unsubmitted)

Copy Time Sheet Cancel Time Sheet Save Submit Cancel

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: David Jones - 9/16/06 - 9/30/06 Status: Unsubmitted

Approvals/Transaction Details Time Sheet Policies

Item	Status	Activity	% Complete	Actual Effort	Hours Added	Task Status	Actual Start
Whirlwind							
<input type="checkbox"/> Design Approval (Whirlwind)	Unsubmitted	Design	70	11.00	11.00	In Progress	9/21/06
<input type="checkbox"/> Write Design Specs (Whirlwind)	Unsubmitted	Design	90	21.00	21.00	In Progress	9/18/06
PFM - Proposal							
<input type="checkbox"/> Req:30001:Upgrade DB version	Unsubmitted						
<input type="checkbox"/> Req:30004:Implement IT Gove...	Unsubmitted						
Project Issue							
<input type="checkbox"/> Req:30218:Usability testing	Unsubmitted						
Miscellaneous							
<input type="checkbox"/> Meetings	Unsubmitted						

Line Actions: Line Details Remove Rework

Add Items

Export Time Sheet

Notes Add Notes

Save Submit Cancel

The **Item**, **Status**, and **Activity** columns on the **Project Fields** tab are the same as on the **Time Breakdown** tab.

To the right of these columns is a set of fields (columns) unique to the **Project Fields** tab. (Scrolling to the right reveals additional fields.) These fields are used only for tasks in projects for which a project manager has integrated Mercury Time Management and Mercury Project Management; they are not used for other types of work items. Having these fields (columns) available on the time sheet's **Project Fields** tab to report "actuals" makes it unnecessary to access Mercury Project Management to report the same actuals. Which fields are visible can vary from project to project, depending on how the project manager has configured the project. For information about configuring this aspect of integration, see *Integration of Mercury Time Management and Mercury Project Management* on page 75.

The unique fields on the **Project Fields** tab include **% Complete**, **Actual Effort**, **Hours Added**, **Task Status**, **Actual Start**, and **Actual Finish**. If configured for this project, **Estimated Remaining Effort** and **Estimated Finish Date** fields are also displayed.

The **% Complete**, **Actual Effort**, **Actual Start**, **Actual Finish**, **Estimated Remaining Effort**, and **Estimated Finish Date** fields reflect your personal *total* contributions to that task for the cumulative time you have reported on time sheets; any contributions that others have made are excluded.

The **Hours Added** field indicates the time you have added to the task since you opened the time sheet.

Displaying the Additional Information Tab

If your Mercury Time Management administrator has configured user data for you to enter on time sheet lines, those fields (columns) are consolidated for the entire time sheet on the **Additional Information** tab of the Edit Time Sheet page. *Figure 2-5* shows an example of the tab with three user data fields, to the right of the **Status** and **Activity** columns, where all three fields have been specified for three particular work items. The administrator can require that users specify some or all of the user data fields. In this example, none of the fields are required, as reflected by the fact that some work items have none of them specified.

The user data fields in this tab are for display only. For information about editing the fields, see *User Data Tab on page 59*.

Figure 2-5. Example time sheet, Additional Information tab

[View Audit Trail](#) [Printable Version](#)

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Unsubmitted)

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: Status: Unsubmitted

Time Sheet Details (All times shown in hours)		Time Breakdown	Project Fields	Additional Information	
Item	Status	Activity	Initiative Type:	Department:	# Staff Affected:
Whirlwind					
<input type="checkbox"/> Design Approval (Whirlwind)	Unsubmitted	Design	Internal	IS	9
<input type="checkbox"/> Write Design Specs (Whirlwind)	Unsubmitted	Design	Internal	IS	9
PFM - Proposal					
<input type="checkbox"/> Req:30001:Upgrade DB version	Unsubmitted				
<input type="checkbox"/> Req:30004:Implement IT Gove...	Unsubmitted				
Project Issue					
<input type="checkbox"/> Req:30218:Usability testing	Unsubmitted		External	R & D	3
Miscellaneous					
<input type="checkbox"/> Meetings	Unsubmitted				

Line Actions:

Notes

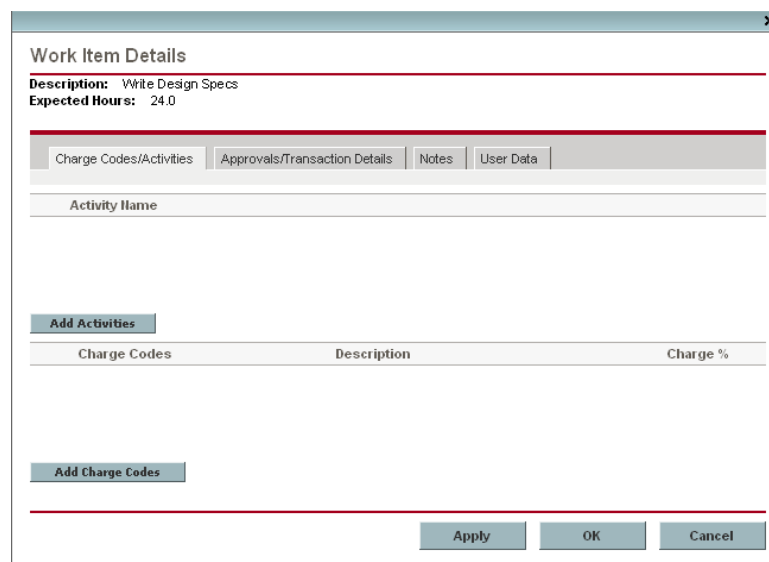
Viewing and Specifying Time Sheet Line Details (Work Item Details)

Selecting exactly one time sheet line in the checkboxes of the left-most column of a time sheet and clicking the **Line Details** button opens the Work Item Details window for that time sheet line. This window includes tabs that are associated with the selected time sheet line, as described in the following sections. Each tab displays the selected work item's **Description** and **Expected Hours** fields.

Charge Codes/Activities Tab

The **Charge Codes/Activities** tab allows you to view and add charge codes (with percentages) and activities associated with this time sheet line (work item). See the example in *Figure 2-6*.

Figure 2-6. Work Item Details, Charge Codes/Activities tab



The screenshot shows a window titled "Work Item Details" with a close button (x) in the top right corner. Below the title bar, the "Description" field contains "Write Design Specs" and the "Expected Hours" field contains "24.0". A tabbed interface is visible with four tabs: "Charge Codes/Activities" (selected), "Approvals/Transaction Details", "Notes", and "User Data". Below the tabs is an "Activity Name" input field. There is an "Add Activities" button. Below that is a table with three columns: "Charge Codes", "Description", and "Charge %". At the bottom left of the table area is an "Add Charge Codes" button. At the bottom right of the window are three buttons: "Apply", "OK", and "Cancel".

Click **Add Charge Codes** and select from the predefined charge codes as necessary to specify the charge codes for this work item. You can also specify the percentage breakdown (to a tenth of a percent) when the cost applies to several charge codes. The values must total 100%. For information about configuring charge codes, see the *Mercury Time Management Configuration Guide*.

Click **Add Activities** and select from the predefined activities as necessary to specify the activities to be associated with this work item. This information can be useful for reporting of total work by multiple resources on each activity, and for future planning estimates. For information about activities, see *Using Activities to Categorize Time To Be Tracked* on page 16.



Note

If a task in a work plan has a specified activity, that task can have only that one activity and you cannot add any other activity to it. If a task in a work plan has no specified activity, you can select and add one or more predefined activities to that task; multiple activities do not “roll up” to the work plan, but their total time does.

Click **OK** on the Work Item Details window to save your updates.

Approvals/Transaction Details Tab

The top portion of the **Approvals/Transaction Details** tab displays the approvers of this time sheet line. See the example in *Figure 2-7*. The **Work Item Line Approver** field displays the people or group who can approve this work item. The list of **Time Sheet Line Approvers** and **Relationship** shows all the approvers who can approve this work item, including delegates and group members.

The **Time Sheet Line Transaction History** section of this tab displays the transaction history for this time sheet line.

Figure 2-7. Work Item Details, Approvals/Transaction Details tab

Work Item Details

Description: Whirlwind
Expected Hours: 24

Charge Codes/Activities | Approvals/Transaction Details | Notes | User Data

Work Item Line Approver: Joseph Banks

Time Sheet Line Approvers	Relationship
Joseph Banks	Line Approver

Time Sheet Line Transaction History

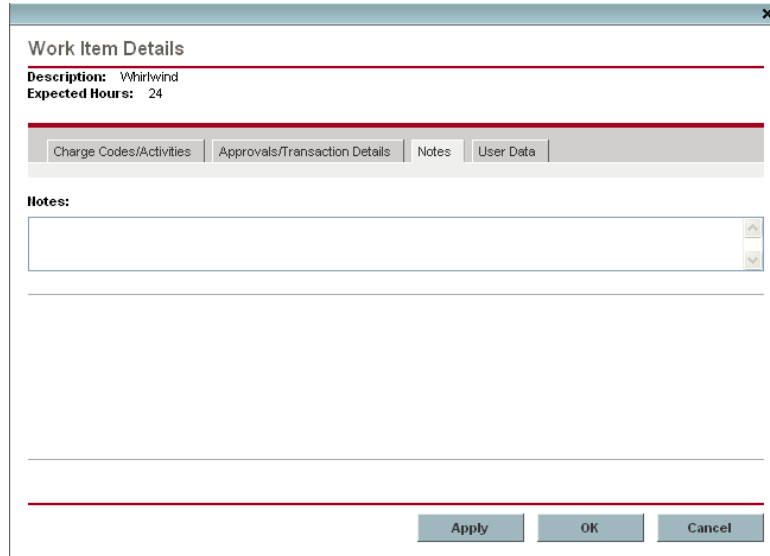
Date	Full Name	Status
------	-----------	--------

Apply OK Cancel

Notes Tab

The **Notes** tab allows you to enter notes regarding the selected time sheet line. See [Figure 2-8](#).

Figure 2-8. Work Item Details, Notes tab



The screenshot shows a dialog box titled "Work Item Details" with a close button (X) in the top right corner. Below the title bar, the text "Description: Whirlwind" and "Expected Hours: 24" is displayed. A horizontal tab bar contains four tabs: "Charge Codes/Activities", "Approvals/Transaction Details", "Notes" (which is selected), and "User Data". Below the tabs, the label "Notes:" is followed by a large, empty text area with a vertical scrollbar on the right side. At the bottom of the dialog box, there are three buttons: "Apply", "OK", and "Cancel".

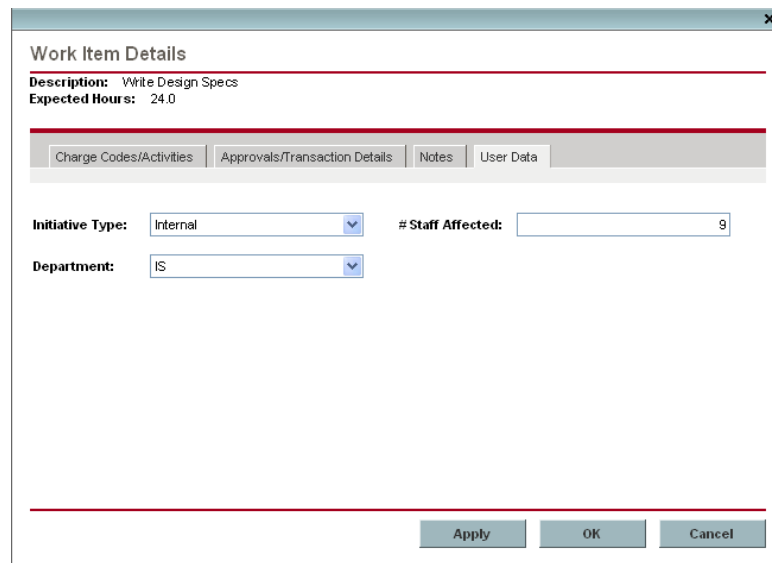
User Data Tab

For each time sheet line, on the **User Data** tab you can specify the custom fields that your administrator has configured. See the example in [Figure 2-9](#).

If you have questions about how to complete the fields, contact your administrator.

The user data for all the lines of a time sheet is displayed on the time sheet's **Additional Information** tab (see [Displaying the Additional Information Tab](#) on page 55).

Figure 2-9. Work Item Details, User Data tab



The screenshot shows a dialog box titled "Work Item Details" with a close button (X) in the top right corner. Below the title bar, the text "Description: Write Design Specs" and "Expected Hours: 24.0" is displayed. A tabbed interface is present with four tabs: "Charge Codes/Activities", "Approvals/Transaction Details", "Notes", and "User Data". The "User Data" tab is currently selected. Below the tabs, there are two rows of fields. The first row contains "Initiative Type:" with a dropdown menu showing "Internal" and a "# Staff Affected:" field with the value "9". The second row contains "Department:" with a dropdown menu showing "IS". At the bottom of the dialog box, there are three buttons: "Apply", "OK", and "Cancel".

Submitting a Time Sheet

When you have completed your time sheet entries for an entire time period and you want to submit the time sheet for approval of its lines:

1. Search for and open the desired time sheet if it is not already open. See [Searching Time Sheets](#) on page 64.
2. On the Edit Time Sheet page, click **Submit**.

Submitting the time sheet submits all of its unsubmitted lines. Time sheet lines cannot be submitted individually.

The status of each time sheet line is set to Submitted and the status of the time sheet is set to Pending Approval.

[View Audit Trail](#) [Printable Version](#)

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Pending Approval)

[Copy Time Sheet](#) [Cancel Time Sheet](#) [Save](#) [Done](#) [Cancel](#)

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1
 Description: David Jones - 9/16/06 - 9/30/06 Status: Pending Approval

[Approvals/Transaction Details](#) [Time Sheet Policies](#)

Time Sheet Details (All times shown in hours)		Time Breakdown	Project Fields	Additional Information	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	V
Item	Status	Activity	Expected Hours	Time Sheet Total					
Whirlwind									
<input type="checkbox"/> Design Approval (Whirlwind)	Submitted	Design	16.0	11.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/> Write Design Specs (Whirlwind)	Submitted	Design	24.0	21.00	0.00	0.00	7.00	6.00	
PFM - Proposal									
<input type="checkbox"/> Req:30001:Upgrade DB version	Submitted		0.0	11.00	0.00	0.00	0.00	0.00	
<input type="checkbox"/> Req:30004:Implement IT Gove...	Submitted		0.0	16.00	0.00	0.00	0.00	0.00	
Project Issue									
<input type="checkbox"/> Req:30218:Usability testing	Submitted		0.0	8.00	4.00	0.00	0.00	0.00	
Miscellaneous									
<input type="checkbox"/> Meetings	Submitted		0.0	5.00	0.00	0.00	1.00	2.00	
Line Actions:				Total 72.00	4.00	0.00	8.00	8.00	

[Line Details](#) [Remove](#) [Rework](#)

[Export Time Sheet](#)

Notes

[Add Notes](#)

[Save](#) [Done](#) [Cancel](#)

Time Sheet Approvals and Transaction Details

Clicking the **Approvals/Transaction Details** button for a time sheet opens the **Time Sheet Details - Approval Details/Transaction History** window. All of its fields are read-only.

The **Approval Details** section displays a cumulative list of the time approvers and billing approvers. The **Time Sheet Transaction History** section displays the change history of the time sheet's status. See [Figure 2-10](#) and [Table 2-5](#).

Figure 2-10. Time Sheet Details - Approval Details/Transaction History

Time Sheet Details - Approval Details/Transaction History

Resource: David Jones **Description:** David Jones - 9/16/06 - 9/30/06

Approval Details

Default Time Approver: Joseph Banks
Billing Approver: Carolyn Sayer

Time Approvers	Relationship
Joseph Banks	Default Time Approver , Line Approver

Billing Approvers	Relationship
Carolyn Sayer	Billing Approver

Time Sheet Transaction History

Date	Full Name	Status
September 20, 2006 4:07:59 PM PDT	David Jones	Changed from "Unsubmitted" to "Pending Approval"

Done

Table 2-5. Time Sheet Details - Approval Details/Transaction History fields

Field Name	Description
Resource	The person for whom the time sheet was created. See Creating a Time Sheet on page 22 .
Description	The description of the time sheet. See Creating a Time Sheet on page 22 .
Approval Details section	
Default Time Approver	The people or security group who can view the time sheet to help guide it through the approval process and resolve issues as may be required. Usually this is the default time approver for the specified Resource . No rights to edit or approve the time sheet are implied.
Billing Approver	The people or security group who can freeze or close the time sheet.
Time Approvers <i>and</i> Relationship	All the approvers associated with this time sheet's lines and each one's relationship to the specified Resource (for example, a particular user, a delegate, or a member of a particular security group).
Billing Approvers <i>and</i> Relationship	All the billing approvers associated with this time sheet's lines and each one's relationship to the specified Resource (for example, a particular user, a delegate, or a member of a particular security group).
Time Sheet Transaction History section	
Date	The date the time sheet status changed.
Full Name	The full name of the person who made the change.
Status	The time sheet statuses before and after the change.

Summary of Time Sheet and Time Sheet Line Statuses

Throughout this guide, the effects of an action on time sheet status and time sheet line status are described in context. For reference, *Table 2-6* summarizes the time sheet line statuses, the time sheet statuses, and conditions that trigger the valid combinations of statuses. In some cases, one or more time sheet line statuses determine the time sheet status; in other cases, the time sheet status determines the status of all of its lines. Remember that a time sheet can have different approvers for its lines, and a line can have more than one approver.

Table 2-6. Time sheet line statuses and time sheet statuses

Statuses of the Lines on the Time Sheet	Status of the Time Sheet	Condition that Triggered the Combination of Statuses
All lines are Unsubmitted.	Unsubmitted	The user has never submitted the time sheet (or the user submitted the time sheet and is now reworking <i>all</i> of its lines on his own initiative, or because approvers rejected them, or a combination of both).
All lines are Submitted.	Pending Approval	The user submitted the time sheet. The approvers have not approved or rejected any lines.
All lines are Approved.	Approved	The approvers approved all the time sheet lines.
Some lines are Submitted; all others are Approved.	Pending Approval	The approvers approved some lines, but not all lines; they have not rejected any lines.
At least one line is Rejected.	In Rework	The approvers rejected the lines that are in Rejected status.
At least one line, but not all lines, are Unsubmitted.	In Rework	The approvers rejected at least one line that the user is reworking, or the user initiated rework of at least one line. Lines being reworked always have a status of Unsubmitted.
All lines are Cancelled.	Cancelled	The user cancelled the time sheet.
All lines are Frozen.	Frozen	The billing approver froze the time sheet.
All lines are Closed.	Closed	The billing approver closed the time sheet.

Searching Time Sheets

When you search time sheets, in addition to applying any filter criteria you specify in the following procedure, Mercury Time Management shows you only the time sheets:

- You created (or someone created for you) to log time.
- Of resources for whom you are the manager.
- Of resources for whom you are a delegate.
- That have any line for which you are the time approver.
- For which you are the billing approver.

To search for particular time sheets:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Time Management Time Sheets > Search Time Sheets.**

The Search Time Sheets page appears.

Search Time Sheets

Search for a Time Sheet to View

Find Time Sheets By:

Period Type:

Time Period:

Previous Time Periods to Show:

Description Includes:

Resource:

Org Unit:

Time Sheet Status:

Include Frozen and Closed Time Sheets? Yes No

Sort By: Ascending Descending

Results Displayed Per Page:

Search

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

Field Name (*Required)	Description
Search criteria	
Period Type (option includes a drop-down list)	When selected, limits the search to time sheets having the period type selected from the drop-down list. Depending on your system's configuration, the list can include the following: <ul style="list-style-type: none"> ■ Weekly (every week, starting by default on a Monday) ■ Bi-Weekly (every two weeks, starting by default on a Monday; for example, 11/06/06 - 11/19/06 and 11/20/06 - 12/03/06 are successive bi-weekly time periods in November and December 2006) ■ Semi-Monthly (twice a month, where the first time period always ends on the 15th of the month; for example, the two semi-monthly time periods of December 2006 are 12/01/06 - 12/15/06 and 12/16/06 - 12/31/06) ■ Monthly (every full month)
Time Period	Enabled when Period Type is selected and a value is chosen for it. Limits the search to a particular time period you select from the drop-down list.
Previous Time Periods to Show (option includes a numeric field)	When selected and specified, applies your search criteria to include time sheets for the number of previous time periods you specify (as well as for current and future time periods).
Resource	Limits the search to time sheets for the resource you specify.
Org Unit	Limits the search to time sheets for the Org Units you specify.
Time Sheet Status	Limits the search to time sheets having the status you specify. The possible time sheet statuses are: <ul style="list-style-type: none"> ■ Unsubmitted ■ Pending Approval ■ Approved ■ In Rework ■ Frozen ■ Closed ■ Cancelled

Field Name (*Required)	Description
Include Frozen and Closed Time Sheets	Whether or not to include frozen and closed time sheets in the search.
Description Includes	Limits the search to time sheets having the text you specify in their Descriptions.
Sort criteria	
Sort By	The parameter (column in the search results) to use to sort the search results. The options are: <ul style="list-style-type: none"> ■ Resource. The resource the time sheet is for. ■ Time Period - Time Sheet #. The time period of the time sheet followed by its number. ■ Manager. The manager of the Resource. ■ Status. The time sheet status. ■ Description. The time sheet description. By default, this is the Resource, followed by a hyphen (-), followed by the Time Period.
Ascending or Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search**.

The Search Time Sheets page is refreshed, with the search results shown in the **Select a Time Sheet to View** section added at the top of the page. The column headings match the **Sort By** options.

Search Time Sheets

@ Export to Excel

Select a Time Sheet to View Showing 1 to 1 of 1 [Prev](#) [Next](#)

Resource	Time Period - Time Sheet #	Manager	Status	Description
David Jones	9/16/06 - 9/30/06 - 1		Unsubmitted	David Jones - 9/16/06 - 9/30/06

Showing 1 to 1 of 1 [Prev](#) [Next](#)

Search for a Time Sheet to View

Find Time Sheets By:

Period Type:
 Time Period:
 Previous Time Periods to Show:

Resource:
Org Unit:
Time Sheet Status:

Include Frozen and Closed Time Sheets? Yes No

Description Includes:

Sort By:
 Ascending
 Descending

***Results Displayed Per Page:**

Search

5. To open a particular time sheet, click its link in the **Time Period - Time Sheet #** column in the **Select a Time Sheet to View** section.

The time sheet opens, with the **Time Breakdown** tab displayed, as shown in the example of *Figure 2-1* on page 25.

Editing a Time Sheet

To edit a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 64.
2. On the Edit Time Sheet page, edit the time sheet as desired and click **Save**. For information about the time sheet fields, see *Understanding Time Sheets and Time Sheet Lines* on page 25.



Note

Delegates can edit time sheets. See *Delegation* on page 79.

Reworking Time Sheet Lines

You can correct (“rework”) time sheet lines on a submitted time sheet if:

- You need to correct the lines or add new lines before they have been approved or rejected by the approver. You will need to resubmit any updates for approval.
- The approver has rejected some time sheet lines. In this case, the time sheet has a status of In Rework, indicating that you need to take action before the time sheet can be approved.

To rework particular time sheet lines (or to add a line):

1. Search for and open the desired time sheet. See [Searching Time Sheets on page 64](#).
2. On the Edit Time Sheet page, select the checkboxes in the left-most column for the submitted time sheet lines you need to rework. (If you only need to add a line, select the checkbox for any existing line, but note that the existing line will become Unsubmitted.)
3. Click the **Rework** button under the **Line Actions** heading.

The status of the selected time sheet lines becomes Unsubmitted and the status of the time sheet becomes In Rework (or Unsubmitted if all of its lines have now become Unsubmitted).

4. If necessary, add new time sheet lines. See [step on page 29](#).
5. If you performed rework actions associated with any time sheet lines, update each affected line as appropriate in terms of time worked, and by selecting the line and clicking **Line Details** (see [Viewing and Specifying Time Sheet Line Details \(Work Item Details\) on page 56](#)).
6. Click **Save** to save the time sheet or click **Submit** to resubmit the time sheet.

Copying a Time Sheet

To copy an existing time sheet:

1. Search for and open the desired time sheet. See [Searching Time Sheets on page 64](#).
2. On the Edit Time Sheet page, click the **Copy Time Sheet** button.

The Copy Time Sheet page appears.

Copy Time Sheet

Time Period: 9/16/06 - 9/30/06 ✖ A Time Sheet for this Time Period and Resource already exists. Duplicate Time Sheets are not allowed. Please choose another Time Period or Resource. [Open Time Sheet](#)

Resource: David Jones

Description: David Jones - 9/16/06 - 9/30/06

Include in Copy

Include the following data on the new time sheet:

Include Closed Items

Copy Cancel

3. Because a time sheet for the time period and resource already exists, you must specify a different **Time Period** or **Resource**.
4. If you want to include closed work items from the original time sheet in the new time sheet, select the **Include Closed Items** checkbox. Closed work items are:
 - Requests that are closed
 - Tasks that are complete and whose projects still allow time to be logged
 - Packages that are closed
5. Click **Copy**.

The Edit Time Sheet page for the new time sheet is opened. The status of all time sheet lines is Unsubmitted, regardless of the statuses of the corresponding time sheet lines on the time sheet that was copied.

6. On the Edit Time Sheet page, edit the time sheet as desired and click **Save**. For information about the time sheet fields, see *Understanding Time Sheets and Time Sheet Lines* on page 25.

Cancelling a Time Sheet



Note

Only Unsubmitted time sheets can be cancelled.
Cancelled time sheets cannot be recovered.

To cancel a time sheet:

1. Search for and open the desired time sheet. See *Searching Time Sheets* on page 64.
2. On the Edit Time Sheet page, click **Cancel Time Sheet**.
A Warning dialog box appears.
3. Click **Cancel Time Sheet** in the Warning dialog box.

The time sheet is cancelled and its status is set to Cancelled. The time sheet can be listed in a search, but all of its lines are deleted.

Printing a Time Sheet

To print a time sheet:

1. Search for and open the desired time sheet. See [Searching Time Sheets on page 64](#).
2. On the Edit Time Sheet page, click **Printable Version**.

A printable version of the time sheet appears.

Print

Mercury Time Sheet

David Jones: 9/16/06 - 9/30/06 Total Hours reported in this Timesheet: **68.00 Hours**

Header

Resource: David Jones Number: 1
 Time Period: 9/16/06 - 9/30/06 Default Time Approver: Joseph Banks
 Status: Unsubmitted Default Billing Approver: Carolyn Sayer
 Description: David Jones - 9/16/06 - 9/30/06

Work Item Information Note: All Time shown in Hours

Work Item	Description	Status	Approver	Expected Hours	Time Sheet Total
Misc: Meetings	Meetings	Unsubmitted	Joseph Banks		5.00
Task: Write Design Specs	Whirlwind > Write Design Specs	Unsubmitted	Joseph Banks	24.00	21.00
Task: Design Approval	Whirlwind > Design Approval	Unsubmitted	Joseph Banks	16.00	11.00
Request #30218	Usability testing	Unsubmitted	Joseph Banks		4.00
Request #30001	Upgrade DB version	Unsubmitted	Joseph Banks		11.00
Request #30004	Implement IT Governance	Unsubmitted	Joseph Banks		16.00
				Totals:	68.00

Time Details

Work Item	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20	Thu 9/21	Fri 9/22	Sat 9/23	Sun 9/24	Mon 9/25	Tue 9/26	Wed 9/27	Thu 9/28	Fri 9/29	Sat 9/30
Misc: Meetings	0.00	0.00	1.00	2.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task: Write Design Specs	0.00	0.00	7.00	6.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Task: Design Approval	0.00	0.00	0.00	0.00	0.00	8.00	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Request #30218	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Request #30001	0.00	0.00	0.00	0.00	0.00	0.00	3.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00
Request #30004	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00
Total Hours:	0.00	0.00	8.00	8.00	8.00	8.00	8.00	4.00	0.00	8.00	8.00	8.00	0.00	0.00	0.00

Notes



If the period type is set to **Monthly**, two **Time Details** sections appear in the printable time sheet, one for the first 15 days of the month and one for the remainder of the month.

3. On this printable version, click **Print**.

The printable version of the time sheet is sent to the default printer.

Viewing the Audit Trail

To view the Time Sheet Audit Trail window, click the **View Audit Trail** link at the top of a time sheet. The audit trail events are listed in reverse chronological order and can require more than one screen. See the example in *Figure 2-11* and *Figure 2-12*.

Figure 2-11. Time Sheet Audit Trail (first) window

Date	User	Context	Event
2006-09-20 16:07:59.0	Jones, David	Write Design Specs	Status Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	Design Approval	Status Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30001	Status Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30218	Status Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	David Jones - 9/16/06 - 9/30/06	Status Changed from "Unsubmitted" to "Pending Approval"
2006-09-20 16:07:59.0	Jones, David	Meetings	Status Changed from "Unsubmitted" to "Submitted"
2006-09-20 16:07:59.0	Jones, David	30004	Status Changed from "Unsubmitted" to "Submitted"

Figure 2-12. Time Sheet Audit Trail (second) window

Date	User	Context	Event
2006-09-20 14:43:09.0	Jones, David	Meetings	Added line "Meetings"
2006-09-20 14:42:16.0	Jones, David	30218	Added line "30218"
2006-09-20 14:41:46.0	Jones, David	30001	Added line "30001"
2006-09-20 14:41:46.0	Jones, David	30004	Added line "30004"
2006-09-20 14:41:06.0	Jones, David	Write Design Specs	Added line "Write Design Specs"
2006-09-20 14:41:06.0	Jones, David	Design Approval	Added line "Design Approval"
2006-09-20 14:24:13.0	Jones, David	David Jones - 9/16/06 - 9/30/06	Added time sheet "David Jones - 9/16/06 - 9/30/06"

The fields (columns) are described in *Table 2-7*.

Table 2-7. Time Sheet Audit Trail fields

Field Name	Description
Date	Date and time of the event.
User	User who initiated the event.
Context	Affected time sheet or time sheet line.
Event	Nature of the event in the audit trail.

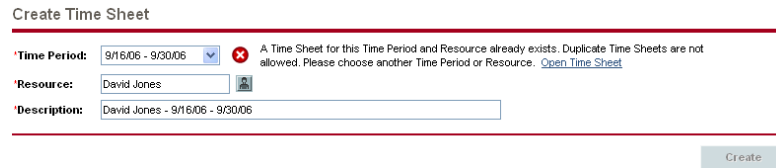
Time Sheet Policies

Time sheet policies are rules designed to control the creation and operation of your time sheets. Everyone who completes a time sheet (that is, every resource) has a time sheet policy assigned by an administrator. Its rules control:

- Which period type (weekly, bi-weekly, semi-monthly, or monthly) is used to log time
- Whether you log time in the form of hours each day, hours each time period, or percent of a time period
- Whether you are allowed to create multiple time sheets for the same time period
- Whether you are required to complete a time sheet for each time period
- Whether certain time sheet lines will be automatically approved
- Whether and when you receive email reminders to submit time sheets (before or after they are due, or both)
- Whether you receive email notification when an approver rejects time that you submitted
- The maximum hours allowed per day and the minimum and maximum hours allowed per time sheet, and consequences of violations
- The default set of charge codes you can assign to time sheet lines
- The work item types (requests, tasks, packages, miscellaneous items) for which you must specify activities on time sheets

For example, if you are not allowed to submit more than one time sheet per time period, you might see a warning such as the one shown in [Figure 2-13](#) when creating a time sheet.

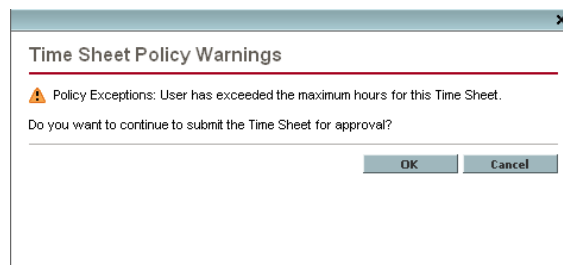
Figure 2-13. Create Time Sheet page that has a warning



The screenshot shows a web form titled "Create Time Sheet". It has three input fields: "Time Period" with a dropdown menu showing "9/16/06 - 9/30/06", "Resource" with a text box containing "David Jones" and a user icon, and "Description" with a text box containing "David Jones - 9/16/06 - 9/30/06". To the right of the "Time Period" field is a red warning icon and a message: "A Time Sheet for this Time Period and Resource already exists. Duplicate Time Sheets are not allowed. Please choose another Time Period or Resource. [Open Time Sheet](#)". A "Create" button is located at the bottom right of the form.

As another example, if you do not adhere to the minimum or maximum hours for a time sheet, you might see a warning when submitting the time sheet. For example, the warning in [Figure 2-14](#) indicates that you have submitted a time sheet with too many hours, based on the time sheet policy assigned to you.

Figure 2-14. Time Sheet Policy Warnings



For details about specifying time sheet policies, see the *Mercury Time Management Configuration Guide*.

Using the My Tasks Portlet

The My Tasks portlet displays project tasks that meet all of the following conditions:

- They are assigned to you.
- Their parent task is in Active status.
- Work is expected on them, that is, their status is Ready or In Progress. (In addition, if you deselect the portlet preference **Only show Tasks ready for my action**, the status could be Pending Predecessor.)
- They are scheduled to start and scheduled to finish within the number of days you specify in the portlet preferences. (By default, the scheduled start date must be within 14 days of the current date, and no default preference is provided for their scheduled finish date.)

Depending on project configuration, the portlet can display both estimated and actual work effort.

See the example in [Figure 2-15](#). For introductory information, see [Using the My Tasks Portlet and Project Integration](#) on page 17.

Figure 2-15. My Tasks portlet

Actual Start	Actual Finish	Actual Effort (hrs)	% Complete
Design Approval Scheduled: 9/21/06 - 9/22/06 (2 days)			
9/21/06		11.00	70
Write Design Specs Scheduled: 9/18/06 - 9/20/06 (3 days)			
9/18/06		21.00	90

If a project manager integrates Mercury Time Management and Mercury Project Management for a project, you have additional capabilities and considerations in reporting time, as described in the following section.

Integration of Mercury Time Management and Mercury Project Management

A project manager can integrate Mercury Time Management and Mercury Project Management on a project-by-project basis. If a project uses this integration capability, you must report details of the time you worked on that project, its tasks, or its summary tasks (depending on how time for the project is tracked) in Mercury Time Management time sheets or in the My Tasks portlet (see *Figure 2-15*). If you report time on time sheets, it is automatically reflected in the My Tasks portlet. Conversely, when you report the time you worked on tasks in the effort breakdown screen available from the My Tasks portlet, that time is automatically reflected in corresponding time sheets.

More specifically, for integrated projects:

- Whenever you update and save a time sheet (directly, or indirectly from the My Tasks portlet by clicking **Go To Time Sheet**), the **Actual Effort** data for tasks on the time sheet's **Project Fields** tab is automatically sent to Mercury Project Management, which updates the **Actual Effort (hours)** on the task in the project's work plan. (The **Actual Effort (hours)** cannot be entered on the work plan.)
- In the My Tasks portlet, you can click the **Edit Effort Breakdown** button (or any **Actual Effort (hrs)** value for a particular task) to display and update the Effort Breakdown window for the selected time sheet (see the example in *Figure 2-16*). This effort breakdown data for tasks in integrated projects is then automatically incorporated into the associated time sheet without separately accessing the time sheet from Mercury Time Management. Conversely, updates to the time sheet for tasks in integrated projects are automatically reflected in the effort breakdown accessed from the My Tasks portlet. (Tasks for projects that are not integrated with Mercury Time Management cannot be added to a time sheet and do not appear in the Effort Breakdown window.)

Figure 2-16. Effort Breakdown window

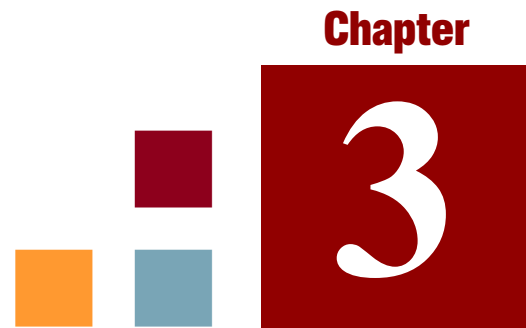
Task / Activity	Hours in all Time Sheets	Hours this Time Sheet	Hours Added	Sat 9/16	Sun 9/17	Mon 9/18	Tue 9/19	Wed 9/20	Thu 9/21	Fri 9/22
Design Approval (Mihirwind) / Design	11.00	11.00	11.00	0.00	0.00	0.00	0.00	0.00	8.00	3.00
Write Design Specs (Mihirwind) / Design	21.00	21.00	21.00	0.00	0.00	7.00	6.00	8.00	0.00	0.00
Hours on other work items:	36.00			0.00	0.00	1.00	2.00	0.00	0.00	5.00
Total Hours:	68.00		32.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00

- Updates to your actuals data other than actual effort, such as % **Complete**, can be entered in either Mercury Time Management or Mercury Project Management, and are then automatically reflected in the other. In the time sheet, this data is entered on the **Project Fields** tab.
- If you have a Mercury Time Management license, you must enter actuals through time sheets or the My Tasks portlet, not in the project's work plan.

■ ■ Note

Remember that the My Tasks portlet displays only tasks, whereas the time sheet allows entry of time for all work item types—requests, packages, tasks, and miscellaneous items.

If you are a project manager and you want to integrate Mercury Time Management and Mercury Project Management for a project, see [Chapter 6, Integrating Time Management and Project Management](#), on page 109.



Reviewing and Approving Time

In This Chapter:

- *Overview of Reviewing and Approving or Rejecting Time*
 - *Determining Time Approvers*
 - *Delegation*
 - *Approving or Rejecting Time*
 - *Approving or Rejecting Time Using the Approve Time Page*
 - *Approving or Rejecting Time Using the TMG - Time Sheet Approvals Portlet*
 - *Approving or Rejecting Time from the Project Overview Page*
 - *Finding Delinquent (Overdue) Time Sheets*
-

Overview of Reviewing and Approving or Rejecting Time

For background information on time sheets, time sheet lines, and their statuses, see *Overview of Reporting Your Time* on page 20.

When a time sheet is submitted, time approvers must review and approve its lines. Approvers see only the time, that is, only the time sheet lines, they are authorized to approve. One time sheet can have different approvers for different lines.

When all the lines on a time sheet become approved, the time sheet status is Approved and it is available for post-approval processing (freezing and closing). If any lines are rejected, they go back to the original resource for rework.

This chapter details the procedures that managers and designated approvers use to approve time. Approvers can take the following actions for time sheet lines they are authorized to approve or reject:

- Review time sheet lines on submitted time sheets. Reviewing a time sheet line leaves its status as Submitted.
- Approve submitted time sheet lines so that they can be frozen and closed. Approved time sheet lines have a status of Approved.
- Reject submitted time sheet lines so that they can be returned to their resources for edits or other types of rework. Rejected time sheet lines have a status of Rejected.



Note

Administrators with the appropriate access grants can configure time sheet policies that allow time to be approved automatically when it is submitted. For more information, see the *Mercury Time Management Configuration Guide*.

Determining Time Approvers

Mercury Time Management determines (derives) the approvers of the time sheet lines on a time sheet whenever the time sheet is saved or submitted.

Only people identified as time approvers (or their delegates) can approve a given time sheet line representing a work item. Default time approvers can be specified for individual resources (users), as described in the *Mercury Time Management Configuration Guide*. In fact, time approvers are determined several ways, depending on the work item type, and they are derived according to priorities described in connection with configuring a resource's default time approvers in the *Mercury Time Management Configuration Guide*.

For information about viewing all approvers and the transaction history for a time sheet, see *Time Sheet Approvals and Transaction Details* on page 61.

Delegation

Mercury Time Management has the concept of delegation, where one person, the delegator, temporarily assigns his or her duties and responsibilities to another person, the delegate. Typically, people in management positions delegate review and approval authority for their time sheets to others, with specific start and end dates (for example, to cover upcoming vacations).

If a delegate has the correct licenses and access grants, which are not inherited from the delegator, the delegate can, on behalf of the delegator:

- Create, edit and submit time sheets
- Approve and reject submitted time logged
- Freeze and close time sheets

A manager has implicit delegations, such as the ability to edit the time sheets of his or her direct reports, if the manager has the Time Mgmt: Edit Time Sheets access grant.

Resources for whom a delegate logs time must have licenses for Mercury Time Management.

When you search time sheets, Mercury Time Management presents the time sheets that meet your filter criteria and for which you are the delegate of a resource, as well as other time sheets as described in *Searching Time Sheets* on page 64.

For more information about delegation, see the *Mercury Time Management Configuration Guide*.

Approving or Rejecting Time

As described in the following sections, you can approve or reject time, using:

- The Approve Time page (see *Approving or Rejecting Time Using the Approve Time Page*).
- The TMG - Time Sheet Approvals portlet (see *Approving or Rejecting Time Using the TMG - Time Sheet Approvals Portlet* on page 84).
- The **Project Summary** tab in a project's Project Overview page (see *Approving or Rejecting Time from the Project Overview Page* on page 86).

Approving or Rejecting Time Using the Approve Time Page

To approve time, you first search for time you can approve. To use the Approve Time page to approve time:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Time Management > Time Sheets > Approve Time**.

The Approve Time page appears.

The screenshot shows the 'Approve Time' page with a search section titled 'Search for Time to Approve'. The fields include:

- *Previous Time Periods to Show: 3
- Show Time Sheets: Both with and without Exceptions
- Resource: [Empty]
- Manager: [Empty]
- Org Unit: [Empty]
- Time Sheet Line Status: Submitted
- Total Hours Equal or Exceed: [Empty]
- Total Hours Equal or Less Than: [Empty]
- Projects: [Empty]
- Sort By: Resource
- Ascending/Descending radio buttons
- *Results Displayed Per Page: 50

 A 'Search' button is located at the bottom right of the form.

3. On the Approve Time page, enter search and sort criteria in the **Search for Time to Approve** section as specified in the following table.

Field Name (*Required)	Description
Search criteria	
*Previous Time Periods to Show	Applies your search criteria to include time from the number of previous time periods you specify (as well as from the current time period).
Resource	Limits the search to time sheets for the selected resource.

Field Name (*Required)	Description
Manager	Limits the search to time sheets for the direct reports of this manager.
Org Unit	Limits the search to time sheets for resources in the selected Org Units.
Time Sheet Line Status	Limits the search to time sheets having lines with the statuses you specify. The default is Submitted .
Show Time Sheets	Limits the search to time sheets with exceptions, without exceptions, or both. An exception is a violation of one of the time sheet policies that specifies allowed maximum hours per day or minimum or maximum hours per time sheet.
Total Hours Equal or Exceed	Limits the search to time sheets on which the total hours equal or exceed the number you specify.
Total Hours Equal or Less Than	Limits the search to time sheets on which the total hours are equal to or less than the number you specify.
Projects	Limits the search to time associated with the projects you specify.
Sort criteria	
Sort By	<p>The parameter (column in the search results) to use to sort the search results. The options are:</p> <ul style="list-style-type: none"> ■ Resource. ■ Time Period - Time Sheet #. Links to the time sheets having the time period and time sheet number (a unique combination). ■ Manager. The manager of the Resource. ■ Status. The Time Sheet Line Status as specified in the search criteria. ■ Hours to Approve. For this time sheet, the number of hours of this Status that you can approve. ■ Total Hours. The total number of hours on this time sheet, regardless of the search criteria or who their approvers are. ■ Approvable Line Costs. The costs associated with the Hours to Approve.
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Results Displayed Per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search**.

The Approve Time page is refreshed, with the search results shown in the **Select Time to Approve** section added at the top of the page.

The screenshot shows the 'Approve Time' interface. At the top, there is a 'Select Time to Approve' section with a table of results. Below the table is a search filter section titled 'Search for Time to Approve' with various input fields and a 'Search' button.

Resource	Time Period - Time Sheet #	Manager	Status	Hours to Approve	Total Hours	Approvable Line Costs
<input type="checkbox"/> Marjorie Olive	9/16/06 - 9/30/06 - 1		Submitted	80	80	3200
<input type="checkbox"/> David Jones	9/16/06 - 9/30/06 - 1		Submitted	72	72	2880

Search filters include: Previous Time Periods to Show (3), Show Time Sheets (Both with and without Exceptions), Resource, Manager, Org Unit, Time Sheet Line Status (Submitted), Total Hours Equal or Exceed, Total Hours Equal or Less Than, Projects, Sort By (Resource), and Results Displayed Per Page (50).

The list includes all the time sheets for which you can approve any time sheet lines. Remember that the time sheet lines on any one time sheet can have various approvers, and you can see only the lines you are authorized to approve.

The column headings match the **Sort By** options. (The **Status** column shows the time sheet line status.)



To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see [step 6](#).

To approve or reject all the submitted time in one or more time sheets:

- a. Select checkboxes in the left column for the time sheets of interest (or select **Check all**).
- b. Click **Approve** or **Reject**.

The Approve Time page is refreshed. The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly. (In those time sheets, other lines for which you are not the approver can be in Submitted, Approved, or Rejected status, depending on what their approvers have done.)

6. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see [step 5](#).

To approve or reject particular time sheet lines:

- a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column in the **Select Time to Approve** section.

View Audit Trail Printable Version

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Pending Approval)

Save Done Cancel

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1

Description: David Jones - 9/16/06 - 9/30/06 Status: Pending Approval

Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)					
Item	Status	Activity	Expected Hours	Time Sheet Total	Sat 9/16
Whirlwind	<input type="checkbox"/>				
<input type="checkbox"/> Design Approval (Whirlwind)	Submitted	Design	16.0	11.00	0.00
<input type="checkbox"/> Write Design Specs (Whirlwind)	Submitted	Design	24.0	21.00	0.00
PFM - Proposal	<input type="checkbox"/>				
<input type="checkbox"/> Req:30001:Upgrade DB version	Submitted		0.0	11.00	0.00
<input type="checkbox"/> Req:30004:Implement IT Gove...	Submitted		0.0	16.00	0.00
Project Issue	<input type="checkbox"/>				
<input type="checkbox"/> Req:30218:Usability testing	Submitted		0.0	8.00	4.00
Miscellaneous	<input type="checkbox"/>				
<input type="checkbox"/> Meetings	Submitted		0.0	5.00	0.00
Line Actions:	Approval Actions:		Total: 72.00	4.00	

Line Details Approve Reject

Export Time Sheet

Notes

Add Notes

Save Done Cancel

- b. For particular time sheet lines in the time sheet, select the desired checkboxes to the immediate left of the time sheet's **Status** column.
- c. Click **Approve** or **Reject**.

The Approve Time page is refreshed. The status of the time sheet lines you approve or reject becomes Approved or Rejected accordingly. (You see only the time sheet lines for which you are the approver. Lines for which you are not the approver can be in Submitted, Approved, or Rejected status, depending what their approvers have done.)

If all the time sheet lines on a time sheet have now become Approved, the time sheet status is Approved.

View Audit Trail Printable Version

David Jones - Time Sheet for 9/16/06 - 9/30/06 (Pending Approval)

Save Done Cancel

Resource: David Jones Time Period: 9/16/06 to 9/30/06 Time Sheet #: 1
 Description: David Jones - 9/16/06 - 9/30/06 Status: Pending Approval

Approvals/Transaction Details Time Sheet Policies

Item	Status	Activity	Expected Hours	Time Sheet Total	Sat 9/16
Whirlwind	<input type="checkbox"/>				
<input type="checkbox"/> Design Approval (Whirlwind)	Approved	Design	16.0	11.00	0.00
<input type="checkbox"/> Write Design Specs (Whirlwind)	Approved	Design	24.0	21.00	0.00
PFM - Proposal	<input type="checkbox"/>				
<input type="checkbox"/> Req:30001:Upgrade DB version	Submitted		0.0	11.00	0.00
<input type="checkbox"/> Req:30004:Implement IT Gove...	Approved		0.0	16.00	0.00
Project Issue	<input type="checkbox"/>				
<input type="checkbox"/> Req:30218:Usability testing	Submitted		0.0	8.00	4.00
Miscellaneous	<input type="checkbox"/>				
<input type="checkbox"/> Meetings	Approved		0.0	5.00	0.00
Line Actions:	Approval Actions:			Total: 72.00	4.00

Line Details Approve Reject

Export Time Sheet

Notes

Add Notes

Save Done Cancel

Approving or Rejecting Time Using the TMG - Time Sheet Approvals Portlet

The TMG - Time Sheet Approvals portlet can be configured to allow approvers to review, then approve or reject submitted time. See *Figure 3-1*.

Figure 3-1. TMG - Time Sheet Approvals portlet

Resource	Time Period - Time Sheet #	Status	Manager	Hours to Approve	Total Hours	Approvable Line Costs
<input type="checkbox"/> David Jones	9/16/06 - 9/30/06 - 1	Submitted		72	72	2880
<input type="checkbox"/> Marjorie Olive	9/16/06 - 9/30/06 - 1	Submitted		80	80	3200

Check all Approve Reject

Showing 1 to 2 of 2 Prev Next Maximize



To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

To use this portlet to approve or reject time sheet lines from time sheets:

1. Log on to Mercury IT Governance Center.
2. If necessary, personalize your Mercury IT Governance Dashboard™ to include the TMG - Time Sheet Approvals portlet.

3. To specify filter criteria for the list of time sheets to approve, click the portlet's **Edit** icon and edit the preferences as you would for any portlet. The portlet filter criteria are the same as on the Approve Time page (see [step 3 on page 80](#)), with the addition of an option to display on the portlet a summary of the portlet preferences you specified.
4. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see [step 5](#).

To approve or reject all the submitted time in one or more time sheets:

- a. Select the time sheet checkboxes in the left column (or select **Check all**).
- b. Click **Approve** or **Reject**.

The TMG - Time Sheet Approvals portlet is refreshed. (The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly.)

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see [step 4](#).

To approve or reject particular time sheet lines:

- a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column.



Note

You can review details for or add notes to any particular time sheet line. See [Viewing and Specifying Time Sheet Line Details \(Work Item Details\) on page 56](#).

- b. For particular time sheet lines in the time sheet, select the checkboxes to the immediate left of the time sheet's **Status** column.
- c. Click **Approve** or **Reject**.

The time sheet is updated (and so are the affected columns in the portlet). The status of the time sheet lines (work items) you approve or reject becomes Approved or Rejected accordingly. (You see only the time sheet lines for which you are the approver. Lines for which you are not the approver can be in Submitted, Approved, or Rejected status, depending what their approvers have done.)

If all time sheet lines on a time sheet have now become Approved, the time sheet status is Approved.

Approving or Rejecting Time from the Project Overview Page

To use the Project Overview page to approve or reject time that is logged against a particular project and that is ready for your approval:

1. From the menu bar, select **Project Management > Projects & Tasks > Search Projects**.
2. Select and open the project of interest.

The Project Overview page opens to the **Project Summary** tab.

3. If present, the **Approve Project Time** section at the bottom of the **Project Summary** tab lists the time sheets for the project that have time submitted for you to approve.

Approve Project Time							
	Resource	Time Period - Time Sheet #	Manager	Status	Hours to Approve	Total Hours	Approvable Line Costs
<input type="checkbox"/>	David Jones	9/16/06 - 9/30/06 - 1		Submitted	32	72	2880

Check all



Note

To see cost data in the **Approvable Line Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

4. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject particular time sheet lines, see [step 5](#).

To approve or reject all the submitted time in one or more time sheets:

- a. Select checkboxes in the left column for the time sheets of interest (or select **Check all**).
- b. Click **Approve** or **Reject**.

The Project Overview page is refreshed. The status of the time sheet lines in the time sheets you approve or reject becomes Approved or Rejected accordingly. (In those time sheets, other lines for which you are not the approver can be in Submitted, Approved, or Rejected status, depending on what their approvers have done.)

5. You can approve or reject all the submitted time in one or more time sheets, or you can approve or reject particular time sheet lines. To approve or reject all the submitted time in one or more time sheets, see [step 4](#).

To approve or reject particular time sheet lines:

- a. Open the time sheet by clicking its link in the **Time Period - Time Sheet - #** column in the **Project Time** section.



On the time sheet, you might see for your approval time sheet lines for request, package, or miscellaneous work item types in addition to time sheet lines for project tasks.

- b. For particular time sheet lines in the time sheet, select the checkboxes to the immediate left of the time sheet's **Status** column.
- c. Click **Approve** or **Reject**.

The status of the time sheet lines you approve or reject becomes Approved or Rejected accordingly. (You see only the time sheet lines for which you are the approver. Lines for which you are not the approver can be in Submitted, Approved, or Rejected status, depending what their approvers have done.)

If all the time sheet lines on a time sheet have now become Approved, the time sheet status is Approved.

Finding Delinquent (Overdue) Time Sheets

A time sheet becomes delinquent (overdue) when all of the following are true:

- The time sheet policy for the associated resource requires him to submit a time sheet for each time period. (For information about time sheet policies, see *Time Sheet Policies on page 72* and the *Mercury Time Management Configuration Guide*.)
- Today's date is after the end date of the time sheet's time period.
- The associated resource has not created the time sheet (it is reported as Missing), has created but not submitted it (its status is Unsubmitted), or needs to rework and resubmit it (its status is In Rework).

You can use the Delinquent Time Sheets report to view summary information for all delinquent time sheets in the system, or for a subset by using filter criteria you specify, if you have the Time Mgmt: View All Time Sheets (Summary Info Only) access grant.

To generate the Delinquent Time Sheets report:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Reports > Create a Report**.

The Submit New Report page opens.

3. From the **Report Category** option, select **Time Management**.
4. Click **Delinquent Time Sheets**.

The Submit Report: Delinquent Time Sheets page opens.

5. Specify filter criteria as described in the following table:

Field Name (*Required)	Description
*Previous Time Periods to Show	Applies your other search criteria to include time sheets from the number of previous time periods you specify.
*Include Current Period	Applies your other search criteria to include time sheets from the current time period. When you specify this option, consider how close today's date is to the end of the current time period.
*Grace Period in Days (affects past periods only)	The number of days after the end of a time period to allow until a time sheet is listed in the report.
Resource	Limits the search to delinquent time sheets for the resources you specify.

Field Name (*Required)	Description
Direct Manager	Limits the search to delinquent time sheets for the direct reports of the manager you specify.
Default Time Approver	Limits the search to delinquent time sheets for the resources who have the default time approver you specify.
Organization Unit	Limits the search to delinquent time sheets for resources in the Organization Unit you specify.
Time Sheet Status	Limits the search to delinquent time sheets with the statuses you specify: <ul style="list-style-type: none"> ■ In Rework ■ Missing (that is, not created) ■ Unsubmitted If not specified, delinquent time sheets that have any of these statuses and that meet other filter criteria are included.
Sort by	Sort the results by Period or Resource .



Note

For information about scheduling and notifications options, see the *Reports Guide and Reference*.

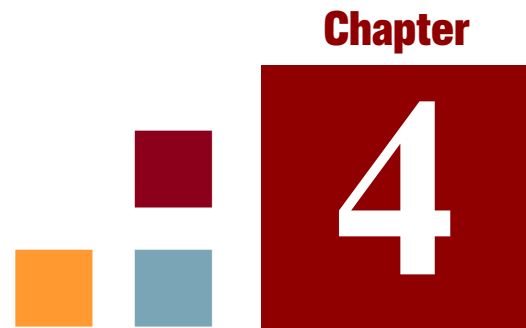
6. Click **Submit**.

The Delinquent Time Sheets report runs.

7. Review the list of delinquent time sheets in the report.

If a delinquent time sheet has not even been created, its status is shown as **Missing**. (If a delinquent time sheet was created but later cancelled, it is considered **Missing**, as though it had never been created.)

8. As needed, open any time sheet that is not **Missing** by clicking its link in the **Period - Time Sheet #** column.



Freezing and Closing Time Sheets

In This Chapter:

- *Overview of Freezing and Closing Time Sheets*
 - *Freezing and Closing Time Sheets*
-

Overview of Freezing and Closing Time Sheets



Note

Mercury Time Management users who only enter time sheet information, submit their time sheets for approval, and occasionally rework or cancel their time sheets do not need to be concerned with freezing or closing time sheets.

Even after a time sheet is approved, a period of time can be allowed for additional updates and re-approvals. However, after any such time has elapsed, the approved time sheet can optionally be “frozen” by a billing approver. This allows actual reporting of the time sheet’s information. When a time sheet is frozen, its status is Frozen. Only approved time sheets can be frozen.

After a time sheet is frozen, costs can be calculated so that third-party billing and financial applications can bill internal or external customers. Mercury Time Management does not explicitly perform this billing function, but it does create links between work items and charge codes.

A charge code is the representation of an internal or external customer who is billed for the cost of a work item. In some organizations, actual time is used as information for charge backs or billings. After a work item is entered, actual time is logged against the work item. This generates a cost that is billed to the internal or external customer.

In some cases, override rules are used to set charge codes. For example, all time worked on a specific project or task can be assigned to a particular charge code.

For more information about charge codes and override rules, see the *Mercury Time Management Configuration Guide*.

After a time sheet has been frozen and data extraction or other external activity has been performed, or if the approved time sheet did not need to be frozen, the final step in the Mercury Time Management process is for the billing approver to close the time sheet. The time sheet status is updated to Closed, and final reports can be generated. Only approved or frozen time sheets can be closed.

This chapter details the procedures associated with the freezing and closing of time sheets by their designated billing approvers.

Freezing and Closing Time Sheets

To freeze or close a time sheet:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Time Management > Time Sheets > Freeze/Close Time Sheets**.

The Search for a Time Sheet to Freeze/Close page appears.

3. Enter search and sort criteria as specified in the following table.

Field Name (*Required)	Description
Search criteria	
Period Type (option includes a drop-down list)	<p>When selected, limits the search to time sheets having the type of time period selected from the drop-down list. Depending on your system's configuration, the list can include the following:</p> <ul style="list-style-type: none"> ■ Weekly (every week, starting by default on a Monday) ■ Bi-Weekly (every two weeks, starting by default on a Monday; for example, 11/06/06 - 11/19/06 and 11/20/06 - 12/03/06 are successive bi-weekly time periods in November and December 2006) ■ Semi-Monthly (twice a month, where the first time period always ends on the 15th of the month; for example, the two semi-monthly time periods of December 2006 are 12/01/06 - 12/15/06 and 12/16/06 - 12/31/06) ■ Monthly (every full month)
Time Period	Enabled when Period Type is selected and a value is chosen for it. Optionally select a particular time period from the drop-down list.

Field Name (*Required)	Description
Previous Time Periods to Show (option includes a numeric field)	When selected and specified, applies your search criteria to include time sheets for the number of previous time periods you specify (as well as for the current time period).
Resource	Limits the search to time sheets for the selected resource.
Manager	Limits the search to time sheets for the direct reports of this manager.
Org Unit	Limits the search to time sheets for the selected Org Units.
Time Sheet Status	Limits the search to time sheets that have the selected status. To freeze or close a time sheet, its status must be Approved.
Include Closed Time Sheets	Whether or not to include closed time sheets in the search.
Sort criteria	
Sort By	<p>The parameter (column in the search results) to use to sort the search results. The options are:</p> <ul style="list-style-type: none"> ■ Resource. As limited by the search criteria, the resources whose time sheets can be frozen or closed. ■ Time Period - Time Sheet #. Links to the time sheets having the time period and time sheet number (a unique combination). ■ Manager. The manager of the Resource. ■ Status. The Time Sheet Status as specified in the search criteria. ■ Total Hours. The total number of hours on this time sheet, regardless of the search criteria or who their approvers are. ■ Total Costs. The costs associated with the Total Hours.
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Results Displayed per Page	Sets the maximum number of results to be displayed per page.

4. Click **Search**.

The Search for a Time Sheet to Freeze/Close page is refreshed, with the search results shown in the **Select a Time Sheet to Freeze/Close** section added at the top of the page. The column headings match the **Sort By** options.

Search for a Time Sheet to Freeze/Close

[Export to Excel](#)

Select a Time Sheet to Freeze/Close Showing 1 to 1 of 1 [Prev](#) [Next](#)

Resource	Time Period - Time Sheet #	Manager	Status	Total Hours	Total Costs
<input type="checkbox"/> David Jones	9/16/06 - 9/30/06 - 1		Approved	72	2880

Check all [Freeze](#) [Close](#)

Showing 1 to 1 of 1 [Prev](#) [Next](#)

Search for a Time Sheet to Freeze/Close

Find Time Sheets By:

Period Type: Semi-Monthly

Previous Time Periods to Show: 3

Resource:

Manager:

Org Unit:

Time Sheet Status: Approved

Include Closed Time Sheets? Yes No

Sort By: Resource Ascending Descending

Results Displayed Per Page: 50

[Search](#)



Note

To see cost data in the **Total Costs** column, you must have the View Project, Program, and Time Sheet Cost Data access grant.

5. Select the checkboxes for the time sheets of interest. (Select **Check all** to select all the time sheets.)

6. Freeze or close the time sheets:

- To freeze the time sheets, click **Freeze**.

The status of the selected time sheets and all their time sheet lines becomes Frozen and the Search for a Time Sheet to Freeze/Close page is refreshed.

- To close the time sheets, click **Close**.

The status of the selected time sheets and all their time sheet lines becomes Closed and the Search for a Time Sheet to Freeze/Close page is refreshed.

Chapter

5

Creating Work Allocations for Users

In This Chapter:

- *Overview of Creating Work Allocations for Users*
 - *Creating Work Allocations*
 - *Editing, Closing, and Deleting Existing Work Allocations*
-

Overview of Creating Work Allocations for Users

Work allocations allow managers and planners to assign a specific amount of time to be spent on any given work item (see *Using Work Items in Time Sheets and Work Allocations* on page 16). Creating work allocations is optional.



Note

Mercury Time Management users who only enter time sheet information, submit their time sheets for approval, and occasionally rework or cancel their time sheets do not need to be concerned with work allocations.

This chapter details the following procedures associated with creating and managing work allocations:

- Creating work allocations.
- Saving work allocations to work on at a later date.
- Closing work allocations.
- Deleting work allocations. Work allocations that have time logged against them cannot be deleted.

Creating Work Allocations

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



Note

To create work allocations, you must have the Time Mgmt: Edit Work Allocations access grant.

To create a new work allocation:

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select
Time Management > Allocations > Create Allocations.

The Create Work Allocations page appears.

Create Work Allocations

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Standard Discount %	Billing Discount %
Request	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Request	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Request	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Request	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Request	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

New Allocations:

Work Item Filters

General Filters

Modified in Last x Days: Created in Last x Days:

Include Closed? Yes No

Request Filters

Request Type:

Request Assigned To: Request Assigned Group:

Task Filters

Project:

Project Manager: Project Assigned Resource:

Task Type:

Task Status:

Scheduled Start From: Scheduled Start To:

Scheduled Finish From: Scheduled Finish To:

Package Filters

Package Workflow:

Package Assigned Group: Package Assigned To:

The available **Work Item Types** can include:

- **Request**
- **Package**
- **Task**
- **Misc** (miscellaneous)

3. (Optional) Use the **Work Item Filters** section of the Create Work Allocations page to limit the collection of work items available in the auto-complete lists associated with the work item types in the rows at the top of the page. Later, you will select the particular work items of interest from those auto-complete lists.

Filters in the **General Filters** section apply to *all* work item types, and filters in the other sections apply to particular work item types.

For example, if you specify filter criteria in the **General Filters** and the **Request Filters** subsections of the **Work Item Filters** section, the set of work items in the auto-complete list for Request work items becomes automatically limited to those that meet both of your sets of criteria, and the sets of work items in the other auto-complete lists become automatically limited by your **General Filters** criteria.

Complete the **Work Item Filters** section as desired, using the information in the following table.

Field Name	Description
General Filters section	
Modified in Last x days	Limits the list of work items to those that were modified within the number of days you specify.
Created in Last x days	Limits the list of work items to those that were created within the number of days you specify.
Include Closed	Indicates whether closed work items are to be included in the list of work items. Closed work items are: <ul style="list-style-type: none"> ■ Requests that are closed ■ Tasks that are complete and whose projects still allow time to be logged ■ Packages that are closed
Request Filters section	
Request Type	Limits the list of requests to those with the set of request types you specify.
Request Assigned To	Limits the list of requests to those assigned to the set of users you specify.
Request Assigned Group	Limits the list of requests to those with the Request Assigned Group you specify from a list of security groups.

Field Name	Description
Task Filters section	
Project	Limits the list of tasks to those in the project you specify.
Project Manager	Limits the list of tasks to those in projects that have the project manager you specify.
Project Assigned Resource	Limits the list of tasks to those with the assigned resource you specify.
Task Type	Limits the list to tasks or to summary tasks, or displays both.
Task Status	Limits the list to tasks of a particular status.
Scheduled Start From	Limits the list of tasks to those that start on the date you specify or later.
Scheduled Start To	Limits the list of tasks to those that start on the date you specify or earlier.
Scheduled Finish From	Limits the list of tasks to those that finish on the date you specify or later.
Scheduled Finish To	Limits the list of tasks to those that finish on the date you specify or earlier.
Package Filters section	
Package Workflow	Limits the list of packages to those with the set of workflows you specify.
Package Assigned Group	Limits the list of packages to those with the Package Assigned Group you specify from a list of security groups.
Package Assigned To	Limits the list of packages to those assigned to the set of users you specify.

For information about how to modify the set of Mercury Time Management filters, see the *Mercury Time Management Configuration Guide*.

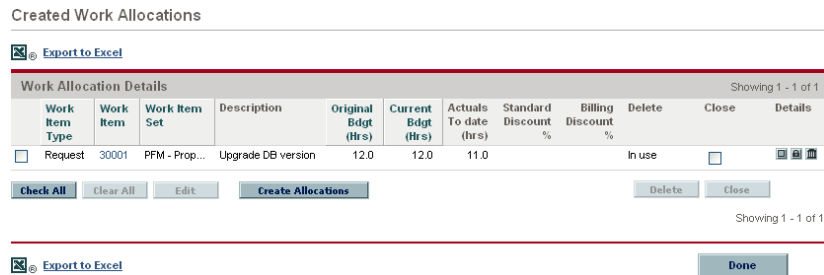
4. When you finish specifying the filters that limit the auto-complete lists of work items for the work item types, complete the fields in the work allocations list at the top of the Create Work Allocations page as specified in the following table.

Field Name	Description
Work Item Type	<p>The list of work items depends on the selection in the Work Item Type field. The work item types (in bold below) and descriptions of their work items are:</p> <ul style="list-style-type: none"> ■ Request. A list of open requests in Mercury Demand Management, identified by the request numbers. ■ Package. A list of open packages in Mercury Deployment Management, identified by the package numbers. ■ Task. A list of project tasks in Mercury Project Management, identified by name. ■ Misc. A list of miscellaneous work items, such as Vacation or Meeting.
Work Item	<p>The name or number of the work item, based on the work item type.</p> <ul style="list-style-type: none"> ■ For requests, a request number. ■ For packages, a package number. ■ For tasks, a task name. ■ For miscellaneous, a selection from Mercury Time Management, such as Vacation or Meeting.
Work Item Set	<p>The work item set of the work items selected:</p> <ul style="list-style-type: none"> ■ For request work items, the specific request type. ■ For package work items, the workflow used by the package. ■ For task work items, the project.
Description	<p>The value in the Description field for the given work item, truncated to 50 characters.</p>
Original Bdgt (Hrs)	<p>The amount of time to budget in whole hours or tenths of an hour. This field can be specified when creating a new work allocation, not for an existing one.</p>

Field Name	Description
Current Bdgt (Hrs)	<p>Initialized to the value provided in Original Bdgt (Hrs). After the work allocation is created, you cannot change Original Bdgt (Hrs)—it is an important metric for tracking accuracy of planning and estimation.</p> <p>During the life cycle of this allocation, enter the budgeted time needed for the work item in this Current Bdgt (Hrs) field, in whole hours or tenths of an hour.</p>
Standard Discount %	<p>If Mercury Time Management is used to gather charge-back information, the cost rate for the resources might be different than the standard rate. For this case, you can specify a pre-negotiated discount rate. Normally this field is either 0% (standard cost rate or no billing is performed) or 100% (no charge for this work item). This rate can be used for custom calculations when extracting data to a billing or financial system.</p>
Billing Discount %	<p>Cost overruns sometimes require charges to be renegotiated. This field sets a pre-billing discount rate for all work performed for the work item. For example, if the costs of a given project went over by 20%, an additional billing discount of 10% might be set. This rate can be used for custom calculations when extracting data to a billing or financial system.</p>

5. Click **Create**.

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



The **Details** column is added on the right. Its three icons, from left to right, are for:

- **Notes**
- **Resource Access**
- **Charge Codes**

6. In the **Details** column, click the **Notes** icon to open the Work Allocation Notes page.

MERCURY Close Window X

Notes

Work Item Type: Request Work Item Set: PFM - Proposal
Work Item: 30001 Description: Upgrade DB version

Add Notes

Add

Done Cancel

Close Window X

- a. Enter information in the text area and click **Add** for each new note.
 - b. Click **Done** to save all of the notes.
7. In the **Details** column, click the **Resource Access** icon to display the Work Allocation Resource Access Information page. Use this page to assign specific resources to a work allocation. Other users are restricted from using the associated work items.

MERCURY Close Window X

Work Allocation Resource Access Information

Work Item Type: Request
Work Item Set: PFM - Proposal
Work Item: 30001
Description: Upgrade DB version

Restrict Access to Resources and Groups listed below:

Add New Allowed Resources and Groups

Resource:

Group:

Add

Existing and New Allowed Resources and Groups

Resource Type: Name

No Allowed Resource and Groups.

Done Cancel

- a. In the Work Allocation Resource Access Information page, select the **Restrict Access to Resources and Groups listed below** checkbox.
- b. Select resources from the **Resource** list and click **Add**.

- c. Select resource groups from the **Group** list and click **Add**.
 - d. Click **Done** to save the selections.
8. In the **Details** column, click the **Charge Codes** icon to display the Work Allocation Charge Code Information page. Use this page to specify the charge codes to use for time billed against a work item. This page also sets the percentage breakdown to use to distribute the total calculated cost among the various charge codes. Charge codes are applied when a work item is added to a time sheet. To assign charge codes, you must be in a security group that allows access to all charge codes or to the specific charge codes.

MERCURY Close Window ✕

Work Allocation Charge Code Information

Work Item Type: Request
 Work Item Set: PFM - Proposal
 Work Item: 30001
 Description: Upgrade DB version

Allow User to Update Charge Codes
 Charge Codes are Required on Time Sheet

Add New Charge Codes

Charge Code:

Charge Code Name	Description	Charge Percent
No Work Allocation Charge Codes		

- a. In the Work Allocation Charge Code Information page, use the first checkbox to indicate whether users are allowed to update the set of charge codes.
 - b. Use the second checkbox to indicate whether charge codes for this work allocation must be entered on time sheets.
 - c. To add a charge code, select the code from the **Charge Code** list and click **Add**.
 This adds the charge code to the list in the **Charge Codes** section.
 - d. Within this section, specify the **Charge Percent** field for each code. You can specify percentages to a tenth of a percent. The values must total 100%.
 - e. Click **Done** to save the selections.
9. To save this work allocation without creating more work allocations, on the Created Work Allocations page, click **Done**.

To add more work allocations, click **Create Allocations** and continue with [step 10 on page 106](#).

10. Repeat [step 3 on page 100](#) through [step 9](#) to create more work allocations. If the number of blank rows is insufficient, enter the number of additional rows required in the **New Allocations** field and click **Add**. This adds the specified number of rows to the section.

Editing, Closing, and Deleting Existing Work Allocations

You can edit, close, and delete work allocations, as follows:

■ ■ Note

To close or delete work allocations you did not create, you must have the Time Mgmt: Edit All Work Allocations access grant.

1. Log on to Mercury IT Governance Center.
2. From the menu bar, select **Time Management > Allocations > Search Allocations**.

The Search Work Allocations page appears.

Search Work Allocations

Search Information

Work Item Type: [dropdown]
Work Item Set: [text field]
Work Item: [text field]
Restricted To: [text field]
Charge Code: [text field]
Creation Date From: [text field] To: [text field]
Actual Budget Over: [text field] %
Include Closed? Yes No

Sort By: [Work Item Type] Ascending Descending

Maximum Lines Displayed: [50]

Search

3. In the Search Work Allocations page, enter search and sort criteria as desired and as specified in the following table.

Field Name (*Required)	Description
Search criteria	
Work Item Type	Limits the search to work allocations for a single type of work item (requests, packages, tasks, or miscellaneous).
Work Item Set	Limits the search to work allocations for a specific request type, a specific project, or a specific package workflow.
Work Item	Limits the search to work allocations for a specific work item. This will return a single work allocation at most.
Restricted To	Limits the search to work allocations that have been restricted to a specific resource.
Charge Code	Limits the search to work allocations that have been linked to a specific charge code.
Creation Date From <i>and</i> To	Limits the search to work allocations created within a specific date range.
Actual/Budget Over	Limits the search to work allocations where the ratio of actual hours to current budgeted hours is greater than the percentage you specify.
Include Closed	Whether or not to include closed work allocations in the search.
Sort criteria	
Sort By	The parameter to use to sort the search results. The options are: <ul style="list-style-type: none"> ■ Work Item Type ■ Work Item Set ■ Work Item ■ Original Budget (Hrs) ■ Current Budget (Hrs)
Ascending <i>or</i> Descending	Displays the results in ascending or descending order.
*Maximum Lines Displayed	Sets the maximum number of results to display on a page.

4. Click **Search**.

Work allocations matching the search criteria are displayed on the Work Allocation Search Results page. The column headings include the **Sort By** options.

Work Allocation Search Results

Export to Excel

Work Allocation Details											Showing 1 - 2 of 2
Work Item Type ▾	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Delete	Close	Details
<input type="checkbox"/>	Task	Coding	Whirlwind	Whirlwind > Coding	15.0	15.0	0.0		<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Request	30001	PFM - Prop...	Upgrade DB version	12.0	12.0	11.0		In use	<input type="checkbox"/>	

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

Showing 1 - 2 of 2

Export to Excel **Done**

5. Perform the desired operation:



Do not attempt to perform any combination of the following operations at the same time.

- To edit work allocations, select the checkboxes in the left-most column for one or more work allocations (if you want to update all of the displayed work allocations, click **Check All**), then click **Edit**.

The Edit Work Allocations page appears. Edit the page as desired and click **Done**. For information about the fields, see *Creating Work Allocations on page 98*.

- To delete work allocations, select the ones to delete using the checkboxes in the **Delete** column, then click **Delete**. Work allocations that have time logged against them cannot be deleted.
- To close work allocations, select the ones to close using the checkboxes in the **Close** column, then click **Close**.

6. On the Work Allocation Search Results page, click **Done**.

Chapter

6

Integrating Time Management and Project Management

In This Chapter:

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

Overview of Integrating Time Management and Project Management

This chapter details the procedures that project managers use to integrate Mercury Time Management and Mercury Project Management. Integration is performed on a project-by-project basis. For background information on the use of the My Tasks portlet and project integration, see *Using the My Tasks Portlet on page 74* and *Integration of Mercury Time Management and Mercury Project Management on page 75*.

In the Project Settings page, you use the **Cost and Effort** policy (primarily its **Time Management** section) to integrate Mercury Time Management and Mercury Project Management for a particular project. There you specify:

- At what level of detail the project's tasks are tracked on time sheets
- Who can log time for the project
- Whether certain project representatives must approve time logged
- Which effort fields are tracked
- Other aspects of integration

In configuring integration, consider the following:

- Any resource who is licensed for Mercury Time Management must use time sheets or the My Tasks portlet, rather than the project work plan, to enter actuals for integrated projects.
- You can configure which actuals are tracked. For integrated projects, where Mercury Time Management is used to track project actuals, you must require resources to track Actual Effort.
- You can configure the level of the project (Project, Summary Task level 2 to 7, or Task) against which resources log time. If time is logged at summary task level 2, for example, resources who are assigned to any tasks that are hierarchically under level 2 report time for those tasks only at summary task level 2.
- If Estimated Remaining Effort is to be tracked, time must be logged at the task level.
- After time is logged against an integrated project, you cannot change logging from any summary task level to the task level.

- After time is logged against an integrated project, you cannot disable integration.
- Resources cannot contribute time to the same task from both Mercury Project Management and Mercury Time Management. Therefore, if you plan to establish integration for a project having tasks that are partially complete, first ensure that actuals are up to date, then divide each partially completed task into a completed task and a new task.

In addition to a **Time Management** section, the **Cost and Effort** policy also has a **Resource Load Settings** section and a **Financial Management** section.

For information about the **Resource Load Settings** section, see the *Mercury Project Management User's Guide*.

In the **Financial Management** section, you can specify whether to use automatic cost calculation so that, whenever a resource updates and saves a time sheet, Mercury Time Management automatically passes the effort data to Mercury Project Management, which calculates and updates the **Actual Cost** for the project. (Then the **Actual Cost** cannot be edited directly in Mercury Project Management.) If you specify manual cost calculation, Mercury Time Management still passes effort data to Mercury Project Management, but Mercury Project Management does not calculate **Actual Cost**. For more information, see the *Mercury Project Management User's Guide*.

The **Project Fields** policy in the Project Settings page determines whether **Estimated Finish Date** and certain other fields are tracked.

Integrating Time Management and Project Management

To integrate Mercury Time Management and Mercury Project Management for a particular project:

1. From the menu bar in the standard interface, select **Project Management > Projects & Tasks > Search Projects**.

The Search Projects window opens.

2. Enter search criteria as desired and click **Search**. To display all projects, click **Search** without entering search criteria.
3. Select a project and click its **Project Name** to open it.

The Project window opens.

4. Click **Project Settings**.

The Project Settings page opens, with a column of buttons, one for each policy, under the text **Select a Policy to Configure**. (The **Project Fields** policy is selected by default.)



Note

Depending on the project type, particular policies might or might not be editable, as indicated by the absence or presence of a **Lock** icon in the button for the policy.

5. For information about configuring the **Project Fields** policy, see the *Mercury Project Management User's Guide*.

Note that the **Cost and Effort** policy controls the availability of **Scheduled Effort** (under the **Schedule Fields** heading), and **Actual Effort** and **Estimated Remaining Effort** (under the **Actuals Fields** heading) for viewing and entry.

6. In the list of policies buttons, click **Cost and Effort** to open the **Cost and Effort** policy.

Project Settings - Whirlwind

Save Done Cancel

* Project Type: Enterprise
Description:

Select a policy to configure:

- Project Fields
- Work Plan
- Request Types
- Scheduling
- Schedule Health
- Cost and Effort**
- Cost and Earned Value Health
- Microsoft Project Integration
- Staffing Profile Assignments
- Project Health
- Issue Health
- Task Auditing
- Project Security

Key: Policies are inherited from Project Type and cannot be altered.

Cost and Effort

Resource Load Settings

Work Load Category: Strategic Projects

Staffing Profile represents the work load imposed by the project
It is recommended that you use the staffing profile as the planned work load for your project. This allows the project manager to plan and schedule the project in phases without concern that the resources will appear unutilized.
In this option, the staffing profile represents both planned and actual resource load. Planned load is always entered directly on the staffing profile. Actual load can be entered directly on the staffing profile or on the work plan or time sheets.

Enter actuals directly on the staffing profile

Use actual information from the work plan and Time Management when viewing actuals in the staffing profile
Actual Effort must be tracked on the work plan in order to use this option.

Work plan task assignments represent the work load imposed by the project
This option is only recommended for short projects when the work plan is fully defined and scheduled. Scheduled Effort and Actual Effort must be tracked on the work plan in order to use the work plan as work load.

Scheduled Effort in the Work Plan

Use Scheduled Effort during planning
Tracking Scheduled Effort in the work plan is required when automatically calculating planned costs or when the work plan represents resource work load.

Automatically calculate Scheduled Effort

Manually enter Scheduled Effort per task assignment

Allow override of effort calculation mode in the work plan

Actual Effort in the Work Plan

Track Actual Effort per resource assignment
Tracking Actual Effort in the work plan is required when automatically calculating actual costs, when using Time Management to track actuals against the work plan, or when the work plan represents resource work load.

Track Estimated Remaining Effort per resource assignment
Tracking Estimated Remaining Effort is not allowed when using Time Management to track actuals against the work plan at a summary task or project level. Once actuals have been entered, this option cannot be deselected.

Time Management

Use Time Management to track actuals against this project.
You can integrate with Time Management if your organization uses time sheets, allowing resources to enter their actuals data in a single location.

Track time at the:

Task level

Summary tasks at hierarchy level: 2
Not available when tracking Estimated Remaining Effort

Project level
Not available when tracking Estimated Remaining Effort

Allow the following to report time on this project:

Project resources
Resources assigned to tasks, resources on the staffing profile, and summary task owners.

Assigned resources
Resources can log time against tasks to which they are assigned, or (if tracking time at a summary task or project level) to summary tasks above them in the project hierarchy.

All resources
All resources who can see the project can log time against it.

After a task is complete, allow time to be logged:

Day(s) more

Time period(s) more (for time period in which the task is complete, enter 0)

Any time

Do not allow. Resources cannot log time against a task that is complete.

Time logged against this project must be approved by a project representative from the following group:

Participant Group: Project Managers

Security Group

Financial Management

Enable Financial Management for Work Plan

Roll up actual costs from the work plan into the project budget

Allow capitalized costs on this project

Planned costs will be:

Automatically calculated based on scheduled effort and rates

Manually entered on tasks and rolled up to summary tasks

Actual labor cost will be:

Automatically calculated based on actual effort and rates

Manually entered on tasks and rolled up to summary tasks

Save Done Cancel

7. In the **Resource Load Settings** section of the **Cost and Effort** policy:
 - a. In the **Scheduled Effort in the Work Plan** subsection, select the **Use Scheduled Effort during planning** checkbox (it is selected by default) if you want to automatically calculate planned costs (see [step 10 on page 116](#)) or if the work plan represents resource work load. If Scheduled Effort is tracked, the resource's Scheduled Effort for a given task and its descendants is displayed in the **Expected Hours** field on the time sheet.
 - b. In the **Actual Effort in the Work Plan** subsection, select the **Track Actual Effort per resource assignment** checkbox (it is selected by default).

Note that if you also select the **Track Estimated Remaining Effort per resource requirement** option, resources must report time at the **Task level** as specified in [step 9](#).

For information about setting other options in the **Resource Load Settings** section of the **Cost and Effort** policy, see the *Mercury Project Management User's Guide*.

8. In the **Time Management** section of the **Cost and Effort** policy, select the **Use Time Management to track actuals against this project** checkbox (it is deselected by default). Selecting this checkbox enables selection of its subordinate options.



Note

After tasks for the project have been added to a time sheet, do not disable integration, that is, do not deselect this option.

9. Configure the details of tracking, logging, and approving time:
 - a. Under the **Track time at the** heading, specify the level (the detail) at which resources must report time spent on this project's tasks on their time sheets:
 - **Task level**
 - **Summary tasks at hierarchy level: (2 to 7)**
 - **Project level**

If time sheets exist for the project, this field cannot be changed from **Summary tasks at hierarchy level** or from **Project level** to **Task level**.

Resources must report time at the **Task level** if **Estimated Remaining Effort** is tracked in the project's work plan (that is, the **Track Estimated Remaining Effort per resource requirement** option is selected in the **Actual Effort in the Work Plan** subsection of the **Resource Load Settings** section of the **Cost and Effort** policy).

- b. Under the **Allow the following to report time on this project** heading, specify the group of resources allowed to report time (at the level specified in [step a](#)):
- **Project resources.** Resources associated with the project—resources assigned to tasks, resources in the staffing profile, and summary task owners—can log time against any task in the project.
 - **Assigned resources.** If time is tracked at the **Task level** (as specified in [step a](#)), resources who are assigned to the task can log time against it. If time is tracked at **Summary tasks at hierarchy level: <X>** or at the **Project level** (as specified in [step a](#)), resources can log time against summary tasks in the project hierarchy that are above the tasks to which they are assigned. This is the default option.
 - **All resources.** All resources who can see the project can log time against any task in the project.
- c. Under the **After a task is Complete, allow time to be logged:** heading, specify whether and for how long time can be logged against a task after its Actual Finish Date (its completion date):
- A number of **Day(s) more**
 - A number of **Time period(s) more.** To allow logging until the end of the time period in which the task is completed, enter 0.
 - **Any time** after the task is completed.
 - **Do not allow. Resources cannot log time against a task that is complete.**
- d. Under the **Time logged against this project must be approved by a project representative from the following group** heading, specify whether this project requires that time be approved by a project representative and, if so, to which type of group the approver must belong:
- A **Participant Group of Project Managers, Stakeholders, or Summary Task Owners**
 - A **Security Group**

If you specify here that time approval by a project representative is required, that requirement supersedes any automatic approval that might be specified in a resource's time sheet policy. For more information about how approvers are determined, see [Determining Time Approvers](#) on page 78.

10. If you want Mercury Project Management to calculate costs based on actual effort passed from Mercury Time Management, then in the **Financial Management** section of this policy:

- a. Select **Enable Financial Management for Work Plan**.
- b. Under the heading **Actual labor cost will be:**, select **Automatically calculated based on actual effort and rates**.

For more information about the **Financial Management** section of the **Cost and Effort** policy, see the *Mercury Project Management User's Guide*.

11. In the **Project Settings** page, click **Save**.

The changes to the project are saved.



Note

Do not disable integration of Mercury Time Management and Mercury Project Management for a project after tasks from the project have been added to time sheets.

A

- activities **16**
 - adding to work items **56**
- adding
 - activities to work items **56**
 - charge codes to work allocations **105**
 - charge codes to work items **56**
 - lines to time sheets **29**
 - miscellaneous work items to My Items list **37**
 - notes to time sheet lines **58**
 - notes to work allocations **104**
 - package work items to My Items list **33**
 - request work items to My Items list **32**
 - resources to work allocations **104**
 - task work items to My Items list **35**
 - user data to work items **59**
 - work items from My Items list to time sheet **38**
 - work items from Suggested Items list to My Items list **40**
 - work items from Suggested Items list to time sheet **40**
 - work items to My Items list **31**
 - work items to time sheets **29**
- Additional Information tab of time sheets **55**

- allocations
 - See* work allocations.
- approval details for time sheets **61**
- Approvals/Transaction Details tab for work item details **57**
- approvers for work items (time sheet lines) **57**
 - determining **78**
- approving time **15, 78**
 - procedure **80**
- audit trail of a time sheet, viewing **71**

B

- billing third-party applications **15**

C

- cancelling time sheets **14**
 - procedure **69**
- charge codes
 - adding to work allocations **105**
 - adding to work items **56**
- Charge Codes/Activities tab for work item details **56**
- closing time sheets **15, 92**
 - procedure **93**
- closing work allocations **106**

configuring

See editing.

copying time sheets 68

creating

time sheets 14

time sheets, procedure 22

work allocations 14

work allocations, procedure 98

D

delegation 79

deleting

work allocations 106

work items from My Items list 38

work items from time sheets 49

Delinquent Time Sheets report 87

E

editing

time sheets 67

work allocations 106

F

filters

general, for My Items list 32, 34, 36

general, for time sheets 42, 43, 48

general, for work allocations 100

package, for My Items list 34

package, for time sheets 43

package, for work allocations 101

request, for My Items list 32

request, for time sheets 42

request, for work allocations 100

task, for My Items list 36

task, for time sheets 47

task, for work allocations 101

freezing time sheets 15, 92

procedure 93

G

general filters

for My Items list 32, 34, 36

for time sheets 42, 43, 48

for work allocations 100

H

history

See transaction history.

I

integration of Time Management and Project Management 17, 75

procedure for project managers 110

L

lines, adding to time sheets 29

lists

My Items

See My Items list.

Suggested Items

See Suggested Items list.

M

Mercury Time Management

See Time Management.

miscellaneous work items

adding to My Items list 37

adding to time sheet 49

My Items list 30

adding miscellaneous work items 37

adding package work items 33

adding request work items 32

adding task work items 35

adding work items 31

adding work items from Suggested Items list 40

adding work items to time sheet 38

deleting work items 38

My Tasks portlet 17, 74
using 74

N

notes
adding to time sheet lines 58
adding to work allocations 104
Notes tab for work item details 58

O

overdue time sheets 87

P

package filters
for My Items list 34
for time sheets 43
for work allocations 101
package work items
adding to My Items list 33
adding to time sheet 43
policies for time sheets 72
portlet
My Tasks 17, 74
TMG - Time Sheet Approvals 84
printing time sheets 70
process, Time Management 13
Project Fields tab of time sheets 53
Project Management integration with Time Management
See integration of Time Management and Project Management.

R

rejecting time 78
procedure 80
removing work items from time sheets 49
report, Delinquent Time Sheets 87
reporting time 20
limitations regarding tasks 45

request filters
for My Items list 32
for time sheets 42
for work allocations 100
request work items
adding to My Items list 32
adding to time sheet 41
resources, adding to work allocations 104
reviewing time 78
reworking time sheet lines 67

S

searching
time sheets 64
time to approve 80
work allocations 106
statuses, summary for time sheets and time sheet lines 63
submitting time sheets 60
Suggested Items list 39
adding work items to My Items list 40
adding work items to time sheet 40

T

task filters
for My Items list 36
for time sheets 47
for work allocations 101
task work items
adding to My Items list 35
adding to time sheet 44
limitations for reporting time 45
third-party applications, billing 15
time
approving
See approving time.
rejecting
See rejecting time.
reporting 20
reviewing 78

Time Breakdown tab of time sheets **50**
Time Management **12**
 integration with Project Management
 See integration of Time Management
 and Project Management.
 process **13**
Time Sheet Approvals portlet
 See TMG - Time Sheet Approvals portlet.
time sheet lines **20**
 adding notes **58**
 adding to time sheets **29**
 approvers **57, 78**
 deleting from time sheets **49**
 details **56**
 history **57**
 reworking **67**
 statuses summary **63**
 transaction history **57**
 understanding in detail **25**
time sheets **20**
 adding miscellaneous work items **49**
 adding package work items **43**
 adding request work items **41**
 adding task work items **44**
 adding work items (lines) **29**
 adding work items from My Items list **38**
 adding work items from Suggested Items
 list **40**
 Additional Information tab **55**
 approvals and transaction details **61**
 approving
 See approving time.
 audit trail **71**
 cancelling **14**
 cancelling, procedure **69**
 closing **15, 92**
 closing, procedure **93**
 copying **68**
 creating **14**
 creating, procedure **22**
 deleting work items (lines) **49**

 delinquent **87**
 editing **67**
 freezing **15, 92**
 freezing, procedure **93**
 history **61**
 policies **72**
 printing **70**
 Project Fields tab **53**
 searching **64**
 statuses summary **63**
 submitting **60**
 Time Breakdown tab **50**
 transaction history **61**
 understanding in detail **25**
TMG - Time Sheet Approvals portlet **84**
transaction details
 See transaction history.
transaction history
 time sheet lines **57**
 time sheets **61**

U

user data, adding to work items **59**
User Data tab for work item details **59**

V

viewing audit trail of a time sheet **71**

W

work allocations **98**
 adding charge codes to **105**
 adding notes to **104**
 adding resources to **104**
 closing **106**
 creating **14**
 creating, procedure **98**
 deleting **106**
 editing **106**
 filters **100**
 searching **106**

work item details **56**

Approvals/Transaction Details tab **57**

Charge Codes/Activities tab **56**

Notes tab **58**

User Data tab **59**

work items **16**

See also time sheet lines.

adding to My Items list **31**

adding to time sheets **29**

deleting from time sheets **49**

