Mercury™ IT Governance Center

Configuring Mercury Time Management

Version 5.5.0

MERCURY INTERACTIVE

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Chapter 1 Introduction

Mercury Time Management budgets time against bodies of work within the Mercury IT Governance Center. Time Management integrates information from Requests, Packages, Tasks and Projects, and quickly determines if estimated time and costs associated with these entities relate to the actual time and costs. Actual time spent is entered on Time Sheets, which are reviewed, approved, frozen and closed.

About This Document

This guide provides instructions for configuring a Time Management system. Each chapter covers a particular topic:

Getting Started	Describes the steps required to complete a Time Management installation.
Key Concepts	Defines the key concepts and definitions used when configuring Time Management.
Integrating Users into the Time Management System	Lists how to integrate users into a Time Management system. This includes information on using Security Groups and controlling users' access to actions.
Maintaining Resources	Shows how to define and maintain a Time Management Resource.
Maintaining Activities	Describes how to configure and maintain Time Management Activities. An Activity is a type of work performed against a Work Item.

Maintaining Charge Codes	Lists the steps to configure and maintain Charge Codes. Charge Codes are entities used as links between Work Items and charge accounts.
Maintaining Override Rules	Shows how to configure and maintain Override Rules. Override Rules can be created to supersede Time Sheet attributes.
Creating and Maintaining Configurable Filters	Lists the procedures to configure and maintain Time Management filters.
Maintaining Time Management Validations	Shows the step-by-step procedures to create and maintain Time Management Validations.
Integrating Mercury Time Management with Mercury Project Management	Describes the steps required to integrate Time Management with Mercury Program Management.
Time Management Portlets and Reports	Lists the Time Management Portlets and Reports.

Intended Audience

The intended audience for this document includes:

- Business or technical users who configure and maintain a Time Management system
- Users responsible for Time Management configuration

Document Conventions

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

Table 1-1. Document conventions

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

Additional Resources

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

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

Related Documentation

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

Using the Workbench	This document explains how to navigate through the Workbench interface.
Tracking Your Time (Time Management)	This document provides instructions for using Time Management.
Managing Your Resources (Resource Management)	This document provides information and instruction on managing Resources.
Security Model Guide and Reference	This document details how security works.

Customer Support

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

Education Services

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

Chapter 2 Getting Started

This chapter provides the information necessary to complete the installation of Mercury Time Management. Time Management is included as part of the standard Mercury ITG Center installation.

This chapter covers the following topics:

Time Management License Key

A separate license key is required to enable Time Management. Install the license key in the <KNTA_HOME>/conf/license.conf directory. See *Security Model Guide and Reference* for detailed information regarding the installation of license keys.

Please contact Mercury Interactive Support (*http://support.mercuryinteractive.com*) for assistance if the license key is not available.

Enabling Time Management for the Administrator

At least one user, typically the application administrator, requires access to set up other users and configure Time Management. The following list shows the main steps required to enable Time Management for the application administrator:

1. Add the Time Management license to the application administrator.
2. Create the Time Management administrative Security Group.
3. Add the application administrator to the Time Management administrative Security Group.

To enable Time Management for the application administrator:

1. Logon to the Mercury ITG Dashboard as the application administrator.
2. Open the Workbench.
3. Add the Time Management license to the application administrator:
   a. Click **Sys Admin > Users**.

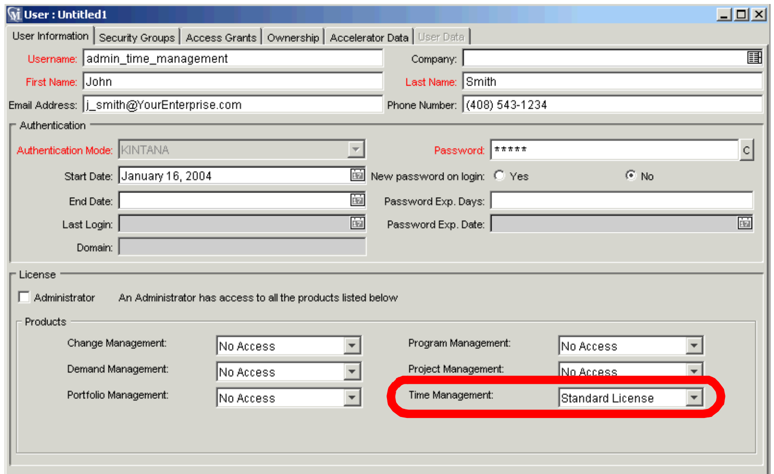
      The Users Workbench window opens.

   b. In the **Query** tab, enter the search criteria to find the application administrator.
   c. Click **List**.

      The **Results** tab opens, displaying the results of the search.

   d. Select the application administrator.
   e. Click **Open**.

      The User window opens.



f. In Time Management, select **Time Management Standard License**.

g. Click **OK** to save the changes and close the User window.

4. Create the Time Management administrative Security Group.

   a. Click **Sys Admin > Security Group**.

      The Security Group Workbench window opens.

   b. In the **Query** tab, click **New Security Group**.

      The Security Group window opens.

   c. Select the **Access Grants** tab.

   d. In Name, enter the name of the new Time Management administrative Security Group.

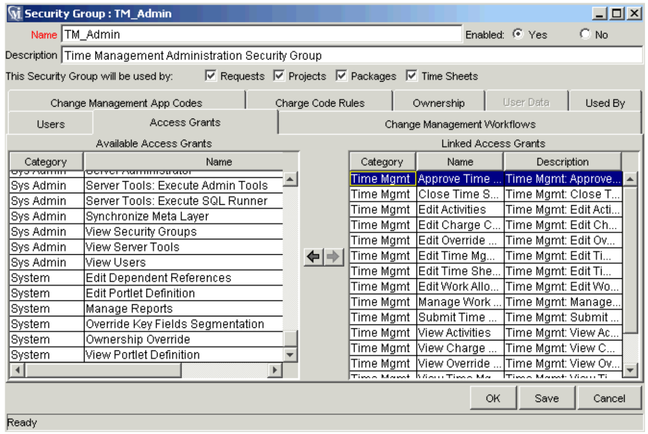
   e. In Enabled, check **Yes**.

   f. In Description, enter a brief description of the new Security Group.

   g. In This Security Group will be used by, check all of the checkboxes.

   h. In Available Access Grants, select all of the Time Mgmt entries.

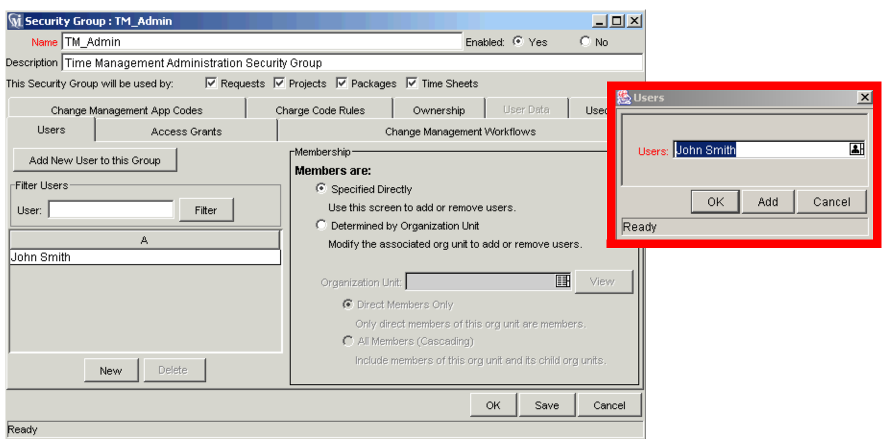
   i. Use the right arrow button to move all of the Time Management Access Grants to the Linked Access Grants list.



j. Click **OK** to save the changes and close the **Access Grants** tab.

5. Add the application administrator to the Time Management administrative Security Group.

   a. In the Security Group window, click the **Users** tab.



   b. Click **Add New User to this Group**.

      The Users window opens.

   c. In Users, enter the name of the application administrator.

   d. Click **OK** to save the changes and close the Users window.

6. Click **OK** to save the changes and close the Security Group window.

Selecting Period Types

This section details how to select Period Types. A Period Type is the duration of the Time Period used by Time Management, such as weekly or monthly. One or more Period Types can be enabled. Selecting the Period Types makes those Period Types available to Time Management. Matching a specific user to a specific Period Type is done when editing Time Management settings for a user (see *"Editing Time Management Settings for a Resource"* on page 37).

Note

Selecting Period Types requires privileges a DBA might not want to grant to the application administrator. Knowledge of SQL is required.

The supported Period Types are listed in *Table 2-1*.

Table 2-1. Period Types and Eligible Values

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

Note

The Period Type eligible values are case sensitive when used in an SQL statement.

To select the Period Type:

1. Logon to the system.
2. Connect to the database schema containing the ITG installation.
3. Run the following query to check the available options:

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

4. To select Period Types, set the enabled flag for the Period Types by executing the following statement:

```
SQL> UPDATE ktmg_period_types
```

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

Where the `<Period Type>` is one of the eligible values listed in *Table 2-1*. All Period Type eligible values must be enabled or disabled. For example, to enable WEEKLY and MONTHLY and disable BI_WEEKLY and SEMI-MONTHLY:

Example

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

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

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

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

Example

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

Creating Time Periods

This section details how to create Time Periods. Creating time periods sets the number of Time Periods available for Time Management. For example, if the Period Type is set to WEEKLY and 52 Time Periods are created, a year's supply of Time Periods is available.

Note

Period Types must be set before creating Time Periods.

Additional Time Periods can be added to Time Management at any time.

To create Time Periods:

1. Log on to the Time Management system as the application administrator.
2. Go to the **<KNTA_HOME>/bin** directory.
3. Run the `kGenTimeMgmtPeriods`.sh command as follows:

   ```
   sh kGenTimeMgmtPeriods.sh <num of periods to be generated>
   ```

   Where `<num of periods to be generated>` is the number of Time Periods to create for a specific type of Time Period. A prompt is returned to choose the Period Type. The `kGenTimeMgmtPeriods.sh` script must be run for each enabled Period Type.

Note

By default, the Time Periods start from the current date.

For more kGenTimeMgmtPeriods.sh options, call the script with no parameters and choose to see the Help.

Chapter 3 Key Concepts

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

This chapter covers the following topics:

Work Items

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

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

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

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

Figure 3-1 displays the Time Sheet Details page with Work Items and Work Item Types.

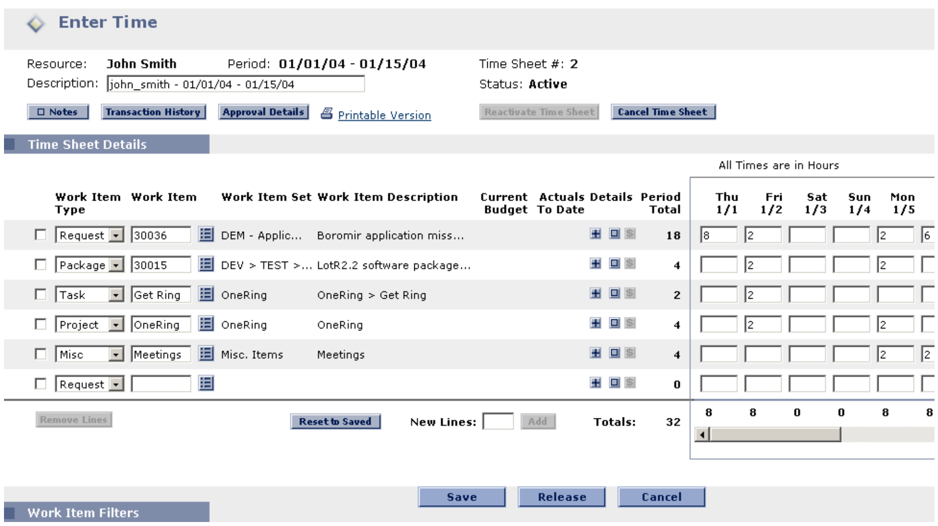


Figure 3-1 Time Sheet Details page

Work Allocations

A Work Allocation is the amount of time budgeted to a Work Item. Work Allocations allow Managers and Planners to assign a specific amount of time to any given Task. Work Allocations also allow the Resources to see the time assigned to Task. *Figure 3-2* displays the Created Work Allocation page.

Note

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

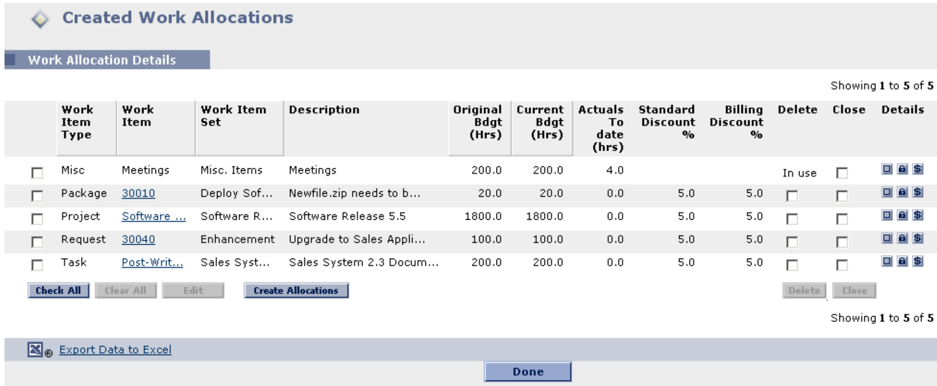


Figure 3-2 Created Work Allocations page

Resources

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

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

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

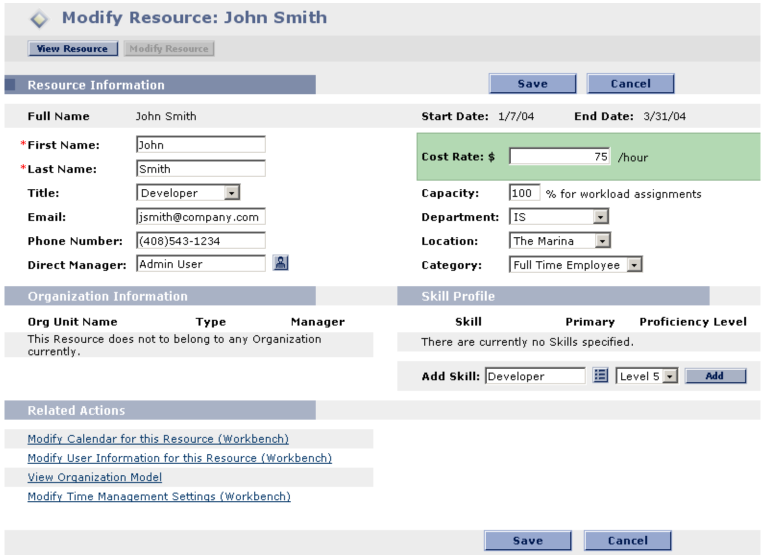


Figure 3-3 Modify Resources page

Time Sheets

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

Figure 3-4 displays a Time Sheet.

Note

The Enter Time page is the Time Management Time Sheet.

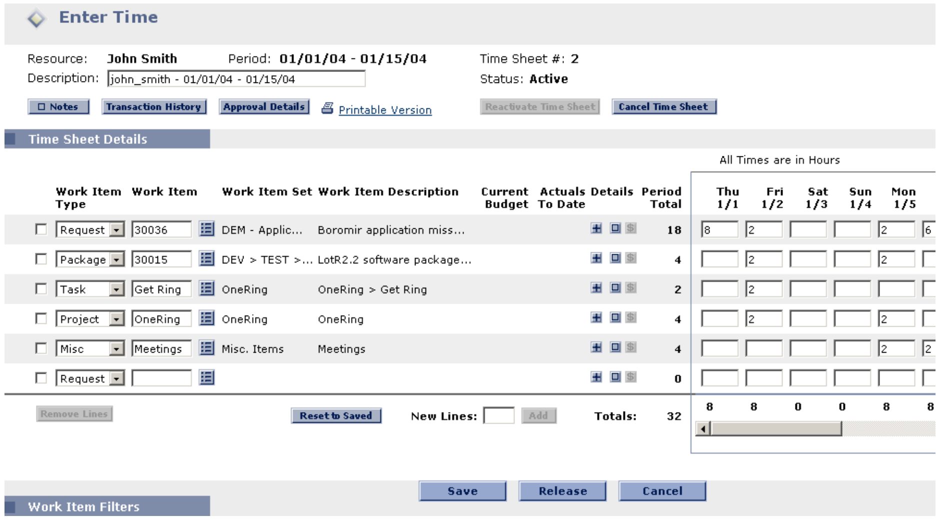


Figure 3-4 Enter Time page

Activities

An Activity is a categorization of the type of work performed against a Work Item, such as design work or documentation. In addition to tracking the total time spent on a given Work Item, Time Management also tracks how much of the time was spent performing different Activities. When using Time Management, the application administrator sets up a list of Activities an organization uses to categorize actual time. An Activity Details page is illustrated in *Figure 3-5*.

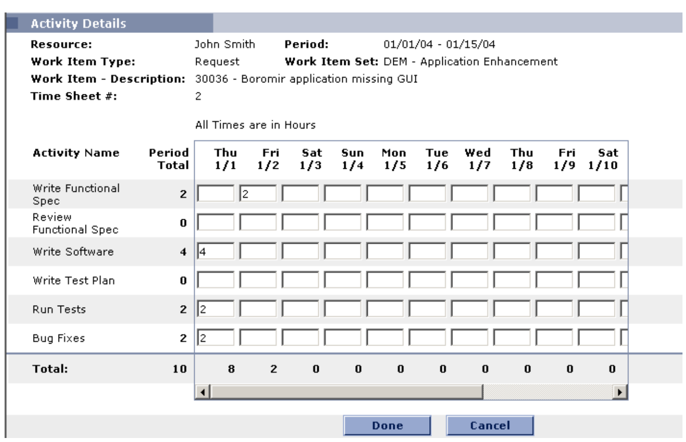


Figure 3-5 Activity Details page

Charge Codes

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

While Time Management does not explicitly perform this charge back or billing function, it can specify the internal or external customer as a Charge Code. This enables the creation of links between Work Items and charge accounts, allowing time information to be extracted for billing systems. *Figure 3-6* shows a Charge Code for the OneRing Project.

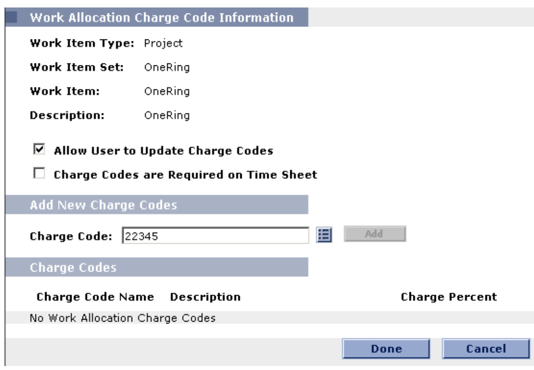


Figure 3-6 Work Allocation Charge Code Information page

Period Types and Periods

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

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

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

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

A Period (Time Period) is the actual dates of a Period Type, such as “05/01/02 - 05/15/02” for a semi-monthly Period Type. Time Sheets display each day in the Time Period. *Figure 3-7* shows a Period on a Time Sheet.

Note

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

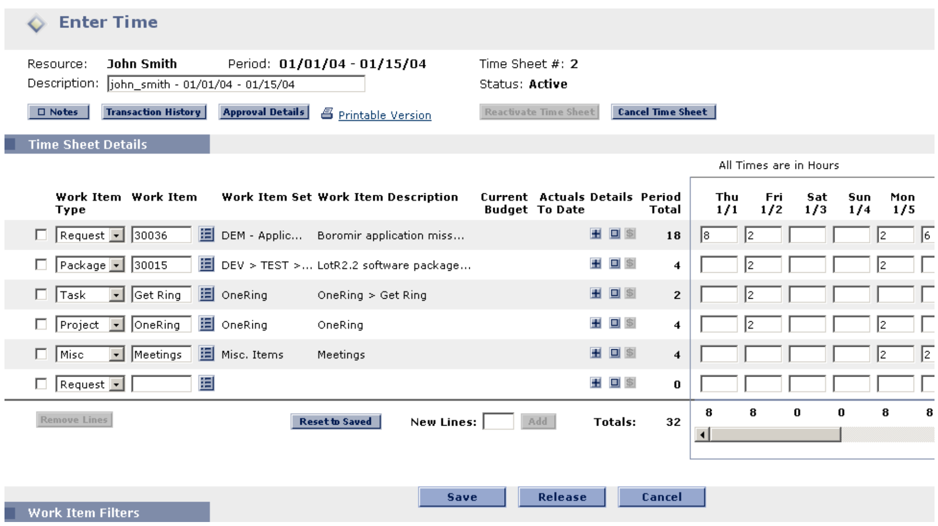


Figure 3-7 Enter Time page

Delegations

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

Example

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

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

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

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

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

Figure 3-8 illustrates a delegation on the Time Sheet Approval Details page.

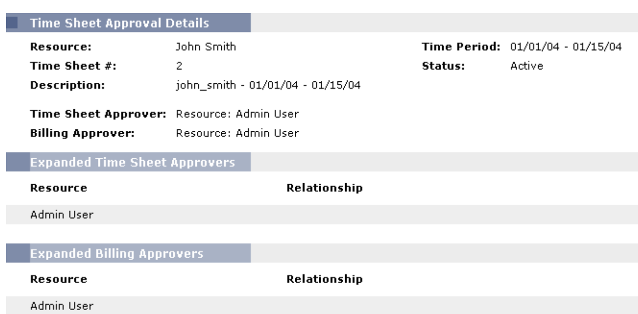


Figure 3-8 Time Sheet Approval Details page

Override Rules

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

- Dependencies
  The attributes required to initiate an Override Rule.
- Results
  The resulting action when an Override Rule's dependencies are met.

For example, all time worked on a specific Project (the dependency) sets that time worked to a specific cost rate (the result). Override Rules are set in the Override Rule window of the Mercury ITG Workbench, as shown in *Figure 3-9*.

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

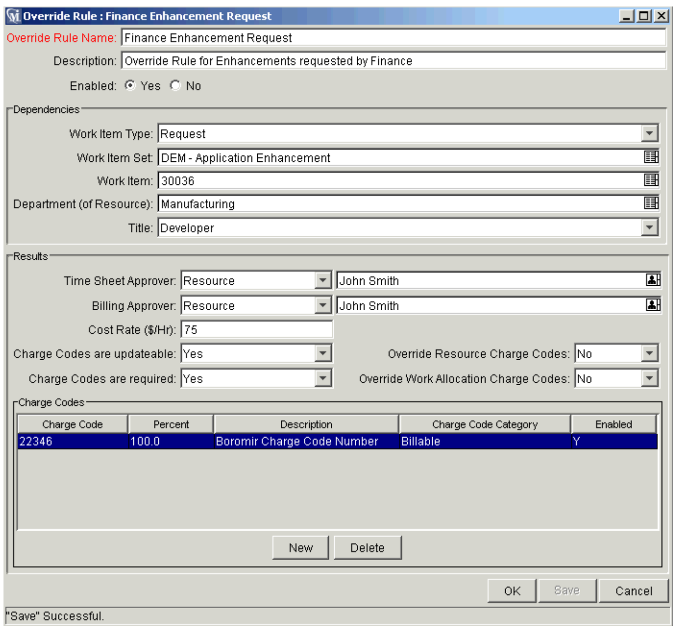


Figure 3-9 Override Rule window

Chapter 4

Integrating Users into the Time Management System

This chapter provides an overview on how to integrate users into a Mercury Time Management system. This chapter also includes information on setting up Security Groups and controlling users' access to actions.

This chapter covers the following topics:

Note

This chapter presents a number of Time Management configuration options. It does not, however, provide detailed instructions on implementing each configuration. See *Security Model Guide and Reference* for a comprehensive resource for configuring user access to the Mercury IT Governance screens and features.

User Actions and Security Groups

A great deal of control can be exercised over the Time Management process, including who can perform the following tasks:

- Approve Time Sheets
- Create and delete Work Allocations
- Maintain Time Management systems

This section covers the following topics:

- *"User Actions and Security Group Overview"* on page 24
- *"Enabling Users to Create Time Sheets"* on page 25
- *"Enabling Users to Approve Time Sheets"* on page 27
- *"Enabling Users to Create Work Allocations"* on page 27
- *"Enabling Users to Maintain a Time Management System"* on page 28

User Actions and Security Group Overview

Time Management is designed to follow a standard process. *Figure 4-1* illustrates the Time Management process. For a detailed view of the Time Management process, see *Tracking Your Time (Time Management)*.

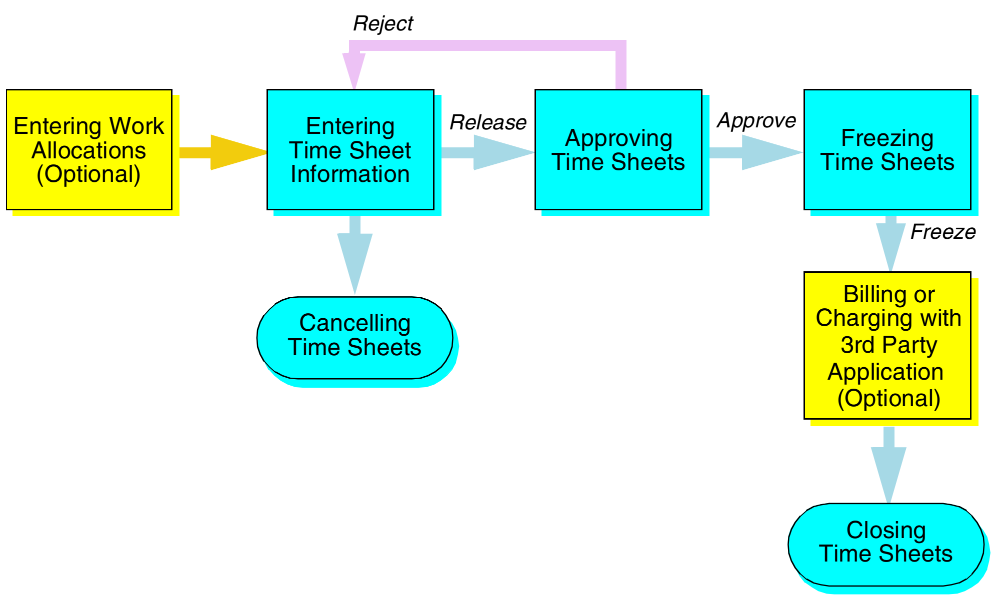


Figure 4-1 Time Management Process Overview

Configuring Access Grants and Security Groups can restrict a user's actions. *Table 4-1* lists the standard Time Management user actions and where these actions fit in the Time Management process.

Table 4-1. User Actions and the Time Management Process

User Actions	Time Management Process
Creating Time Sheets • Who can create and edit Time Sheets • Who can release Time Sheets • Who can cancel Time Sheets	• Entering Time Sheet Information • Cancelling Time Sheets
Processing Time Sheets • Who can approve Time Sheets • Who can reject Time Sheets • Who can freeze Time Sheets • Who can close Time Sheets	• Approving Time Sheets • Freezing Time Sheets • Closing Time Sheets
Creating Work Allocations • Who can view and edit their own Work Allocations • Who can view, edit, delete and close any Work Allocation	• Entering Work Allocations

Note

Billing or charging with 3rd Party Application is an optional Time Management step. After a Time Sheet is frozen, costs can be generated to bill an internal or external customer. Time Management does not perform this billing function. Instead, Time Management creates the links to allow the cost information to be extracted.

Enabling Users to Create Time Sheets

To enable a user to create, release and cancel a Time Sheet, establish the settings listed in *Table 4-2*.

Table 4-2. Settings to enable Time Sheet creation

Setting	Value	Description
License	Time Management: Standard License	The Standard License provides a user with access to Time Management. This is set in the User window on the Workbench. See *"Adding Time Management Licenses"* on page 29.
Access Grants linked to the Security Group	Time Mgmt: Edit Time Sheets	View, create, edit, cancel and release Time Sheets for the Resource. Edit Time Sheets when the Resource is a direct report or when the Time Sheet has been "Delegated To" the user. Access Grants are set in the Security Group window. See *"Establishing Security Groups"* on page 30.
Time Management Settings	Set the Time Sheet settings, Time Sheet Approver and Billing Approver.	This is set in the Time Management Settings window on the Workbench. See *"Editing Time Management Settings for a Resource"* on page 37.
Settings for the Security Group	Set Charge Code visibility.	This is set in the Security Group window on the Workbench. See *"Establishing Security Groups"* on page 30.

Note

Screen and function access provided through Access Grants are cumulative. If a user belongs to three different Security Groups, they will have all of the accesses provided to each of the groups. To restrict certain screen and feature access:

- Remove the user from the Security Group (using the Security Group tab on the User window)
- Remove the Access Grants from the Security Group (in the Security Group window). Do this only if no one in that Security Group needs the access provided in that Access Grant.

Enabling Users to Approve Time Sheets

To enable a user to approve and close a Time Sheet, establish the settings listed *Table 4-3*.

Table 4-3. Settings to enable Time Sheet approval

Setting	Value	Description
License	Time Management: Standard License	The Standard License provides a user with access to Time Management. This is set in the User window on the Workbench. See *“Adding Time Management Licenses”* on page 29.
Access Grants linked to the Security Group	Time Mgmt: Approve Time Sheets	Approve or reject Time Sheets. Access Grants are set in the Security Group window. See *“Establishing Security Groups”* on page 30.
	Time Mgmt: Close Time Sheets	Freeze or close Time Sheets. Access Grants are set in the Security Group window. See *“Establishing Security Groups”* on page 30.
	TIme Mgmt: View Time Sheets	View a user’s Time Sheet information. Access Grants are set in the Security Group window. See *“Establishing Security Groups”* on page 30.
Settings for the Security Group	Set Charge Code visibility.	This is set in the Security Group window on the Workbench. See *“Establishing Security Groups”* on page 30.

Enabling Users to Create Work Allocations

To enable a user to create and delete a Work Allocation, establish the settings listed in *Table 4-4*.

Table 4-4. Settings to enable Work Allocation creation

Setting	Value	Description
License	Time Management: Standard License	The Standard License provides a user with access to Time Management. This is set in the User window on the Workbench. See *"Adding Time Management Licenses"* on page 29.
Access Grants linked to the Security Group	Time Mgmt: Edit Work Allocations	View and edit Work Allocations. The user can also close or delete Allocations they created. Access Grants are set in the Security Group window. See *"Establishing Security Groups"* on page 30.
	Time Mgmt: Manage Work Allocations	View, edit, delete and close any Work Allocation. Access Grants are set in the Security Group window. See *"Establishing Security Groups"* on page 30.
Settings for the Security Group	Set Charge Code visibility.	This is set in the Security Group window on the Workbench. See *"Establishing Security Groups"* on page 30.

Enabling Users to Maintain a Time Management System

To enable a user to maintain some or all of the Time Management system, establish the settings listed in *Table 4-5*.

Table 4-5. Settings to enable Time Management maintenance

Setting	Value	Description
License	Time Management: Standard License	The Standard License provides a user with access to Time Management. This is set in the User window on the Workbench. See *"Enabling Time Management for the Administrator"* on page 5.

Table 4-5. Settings to enable Time Management maintenance [continued]

Setting	Value	Description
Access Grants linked to the Security Group	All Time Management Access Grants	Allows the user to access any part of Time Management. This is set in the Security Group window on the Workbench. See *"Enabling Time Management for the Administrator"* on page 5.

Adding Time Management Licenses

This section details how to assign Time Management licenses. Every user must have an assigned Time Management license to access the Time Management functionality.

Assigning licenses can be done with one of the following methods:

- Assigning licenses in the User window
- Assigning licenses to multiple users in the License Workbench
- Assigning licenses using the open interface

This section details how to assign licenses in the User window. See *Security Model Guide and Reference* for complete instruction on how to assign licenses using the License Workbench and the Open Interface.

To assign licenses in the User window:

1. Open the Workbench.
2. Click **Sys Admin > Users**.

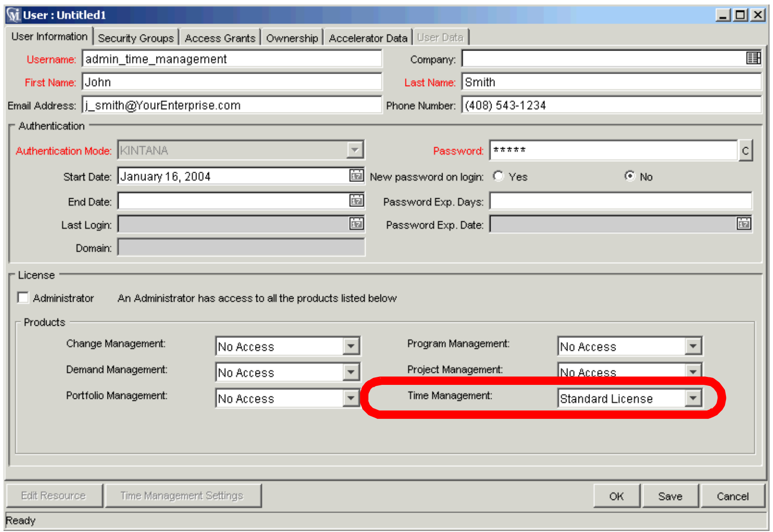
   The Users Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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

5. Select the user.

6. Click **Open**.

   The User window opens.



7. In Time Management, select **Time Management Standard License**.

8. Click **OK** to save the changes and close the User window.

Establishing Security Groups

Security Groups are used to control who can access certain screens and functionality. The following lists the different ways to define a Security Group:

- Create a Security Group by specifying a list of users.
- Create a Security Group using Resource Management.

This section details how to create a Security Group by specifying a list of Users. See *Security Model Guide and Reference* for complete instruction on how to establish Security Groups using Resource Management.

The general process for creating a Time Management Security Group is as follows:

1. Create the Time Management Security Group.

2. Add the Users to the Time Management Security Group.
3. Set the Charge Code Rules for the Time Management Security Group.

Create a Security Group using a list of users:

1. Open the Workbench.
2. Create the Time Management Security Group.
   a. Click **Sys Admin > Security Groups**.

      The Security Group Workbench window opens.

   b. In the **Query** tab, click **New Security Group**.

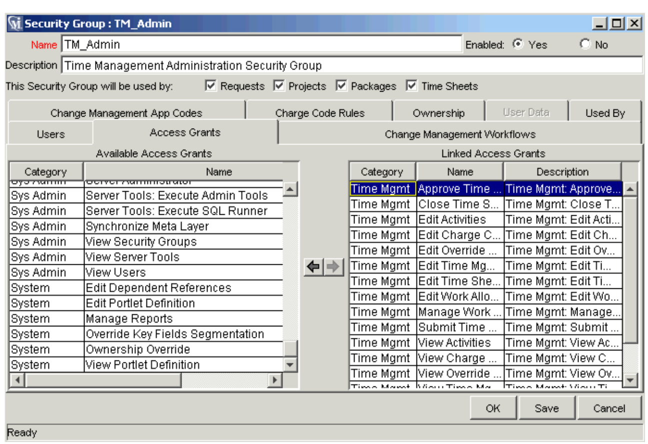
      The Security Group window opens.

   c. In Name, enter the name of the new Time Management Security Group.
   d. In Enabled, check **Yes**.
   e. In Description, enter a brief description of the Security Group.
   f. In This Security Group will be used by, check all of the checkboxes.

Note

Make sure Time Sheets is checked.

   g. Select the **Access Grants** tab.



h. In the Available Access Grants list, select the required Time Management Access Grants for the Security Group.

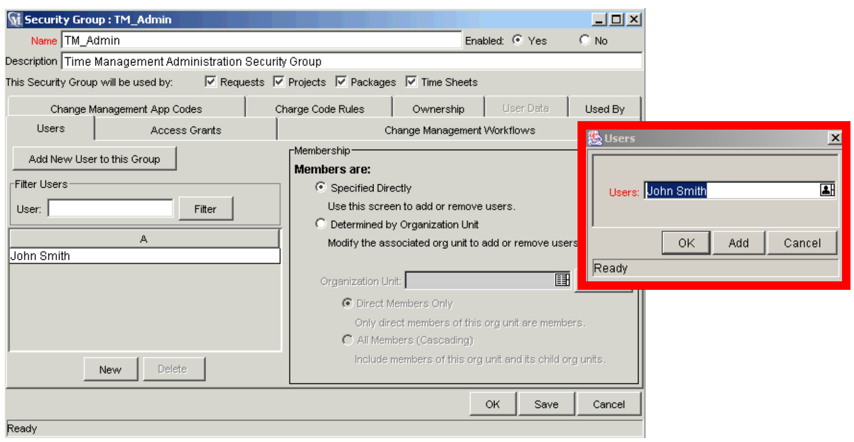
See *"User Actions and Security Groups"* on page 23 for a list of Time Management Access Grants and Security Group functionality.

i. Click the right arrow button pointing to the Linked Access Grants list. The selected Access Grants are moved into the Linked Access Grants list.

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

3. Add the Users to the Time Management Security Group.

a. Click the **Users** tab.



b. Click **Add New User to this Group**.

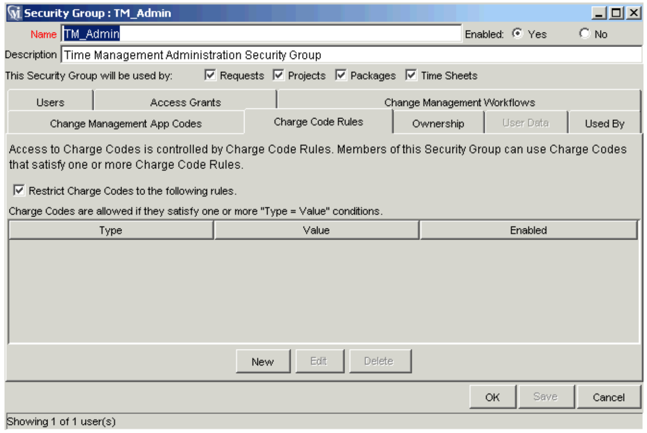
The Users window opens.

c. In Users, add the name of the user or users.

d. Click **OK** to save the changes and close the Users window.

4. Set the Charge Code Rules for the Time Management Security Group.

a. Click the **Charge Codes Rules** tab.

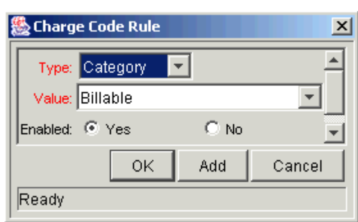


b. Check Restrict Charge Codes to the following rules.

This field determines whether Charge Codes for this Security Group are restricted. If unchecked, this Security Group has access to all Charge Codes.

c. Click **New**.

The Charge Code Rule window opens.



d. In Type, select a Type of Charge Code. Charge Code types include:

- Category
  The category of the Charge Codes, such as billable and non-billable.

- Client
  The external client of the Charge Codes, such as an outside vendor or customer.

- Department
  The internal client of the Charge Codes, such as the Finance department or Sales department.

e. Select a **Value** for the Charge Code Rule to satisfy.

   Values are dynamically updated by the Type field.

f. Check **Yes** in the Enabled field.

g. Click **OK** to save the Charge Code Rule and close the Charge Code Rule window.

5. Click **OK** to save the changes to the Security Group and close the Security Group window.

Time Management Access Grants

Table 4-6 lists the Time Management Access Grants that provide access to the different Time Management actions.

Table 4-6. Time Management Access Grants

Access Grant Name	Description
Time Mgmt: Approve Time Sheets	Approve or reject Time Sheets.
Time Mgmt: Close Time Sheets	Close or freeze Time Sheets.
Time Mgmt: Edit Activities	Create, modify and delete Activities in the Activities Workbench.
Time Mgmt: Edit Charge Codes	Create, modify and delete Charge Codes in the Charge Codes Workbench.
Time Mgmt: Edit Override Rules	Create, modify and delete Override Rules in the Override Rules Workbench.
Time Mgmt: Edit Time Mgmt Settings	Edit Time Management settings for a user in the Time Mgmt Settings Workbench. Also enables the Time Management Settings button in the User window.

Table 4-6. Time Management Access Grants [continued]

Access Grant Name	Description
Time Mgmt: Edit Time Sheets	View, create, edit, cancel and release Time Sheets. Edit Time Sheets when the Resource is a direct report or when the Time Sheet has been "Delegated To" the user.
Time Mgmt: Edit Work Allocations	View and edit Work Allocations. The user can also close or delete Allocations he created.
Time Mgmt: Manage Work Allocations	View, edit, delete and close any Work Allocation.
Time Mgmt: View Activities	View Activities in the Activities Workbench.
Time Mgmt: View Charge Codes	View Charge Code definitions in the Charge Code Workbench.
Time Mgmt: View Override Rules	View Override Rules in the Override Rules Workbench.
Time Mgmt: View Time Mgmt Settings	View Time Management settings for a user in the Time Mgmt Settings Workbench. Also enables the Time Management Settings button in the User window.
Time Mgmt: View Time Sheets	View a user's Time Sheet information.
Time Mgmt: View Work Allocations	View Work Allocations in Mercury IT Governance.

Chapter
5
Maintaining Resources

This chapter details procedures to configure and maintain Mercury Time Management Resources. Resources are Users with additional attributes applicable to Resource Management and Time Management.

This chapter covers the following topics:

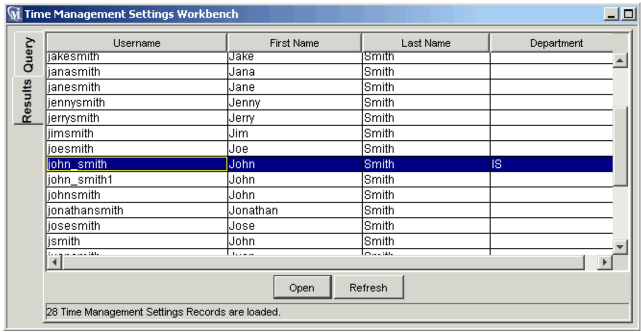
Editing Time Management Settings for a Resource

To edit a Resource for Time Management settings:

1. Open the Workbench.
2. Click **Time Mgmt > Time Mgmt Settings**.

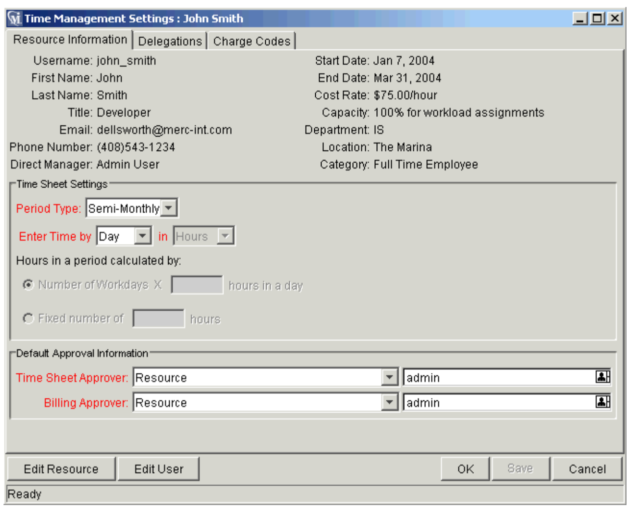
   The Time Management Settings Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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



6. Click **Open**.

   The Time Management Settings window opens.



7. Fill in all required fields and any optional fields as listed in *Table 5-1*.

Table 5-1. Time Management Settings - Resource Information fields

Field	Description
Period Type	Chooses the type of period a Resource enters their time by.
Enter Time by	These two fields dictate the increments by which the Resource enters time. If time is entered by Day, then Hours is the default choice. If time is entered by Period, then it can be entered in Hours or by Percent.

Table 5-1. Time Management Settings - Resource Information fields [continued]

Field	Description
Hours in a Period Calculated By	If time is entered by Period in Percentages, the hours in a Period must be calculated using one of two methods: Number of workdays multiplied by the number of hours in a day (configurable), or a fixed number of hours (configurable).
Default Approval Information	Sets the default approver. • Time Sheet Approver These two fields indicate the default approvers of Released Time Sheets for this Resource. • Billing Approver These two fields indicate the users who can freeze and close Time Sheets for this Resource.

8. Click **OK** to save the changes to the Resource and close the Time Management Settings window.

Note

To edit the Resource, click **Edit Resource**. The **Edit Resource** button opens the Modify Resource page on the Dashboard.

To edit the User, click **Edit User**. The **Edit User** button opens the User's window of the System Admin screen group.

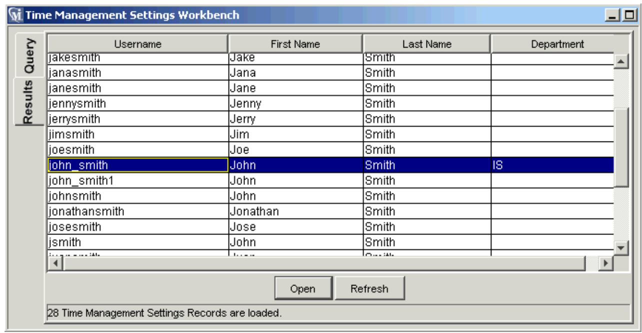
Setting Delegations for a Resource

To assign delegated users for the Resource:

1. Open the Workbench.
2. Click **Time Mgmt > Time Mgmt Settings**.

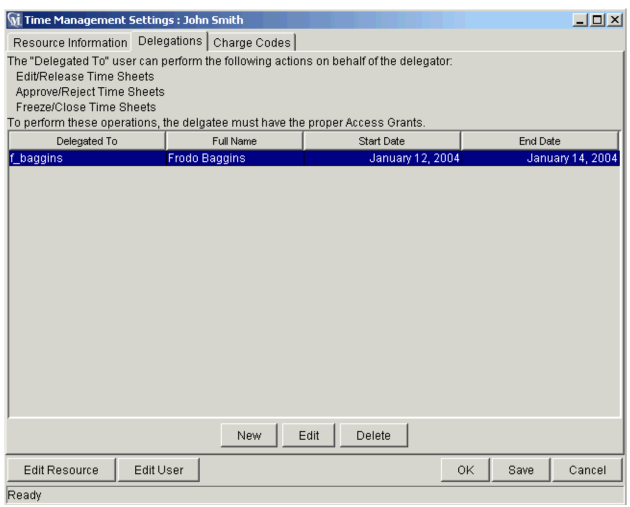
   The Time Management Settings Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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



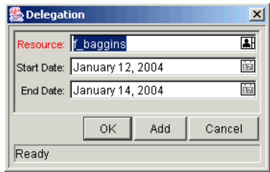
5. Select a Resource.
6. Click **Open**.

   The Time Management Settings window opens.
7. Click the **Delegations** tab.



8. Click **New**.

   The Delegation window opens.



9. Fill in all required fields and any optional fields to select a Resource as specified in *Table 5-2*.

Table 5-2. Delegation fields

Field	Description
Resource	The Resource assigned as the delegate. Only one Resource can be entered.
Start Date	The start date for the period of delegation.
End Date	The end date for the period of delegation.

10. Click **OK** to save the changes and close the Delegation window.

11. Click **OK** to save the changes to the Resource and close the Time Management Settings window.

Setting Charge Codes for a Resource

To set the default Charge Code for a Resource:

1. Open the Workbench.

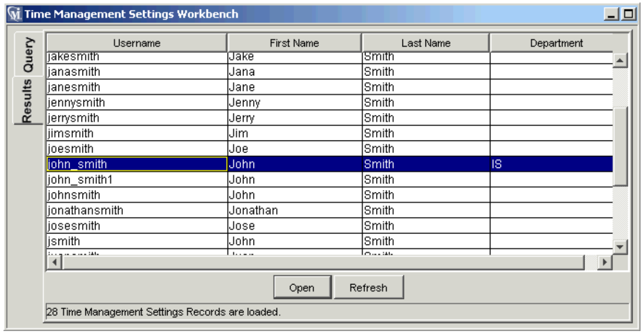
2. Click **Time Mgmt > Time Mgmt Settings**.

   The Time Management Settings Workbench window opens.

3. In the **Query** tab, enter the search criteria.

4. Click **List**.

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



5. Select the Resource.

6. Click **Open**.

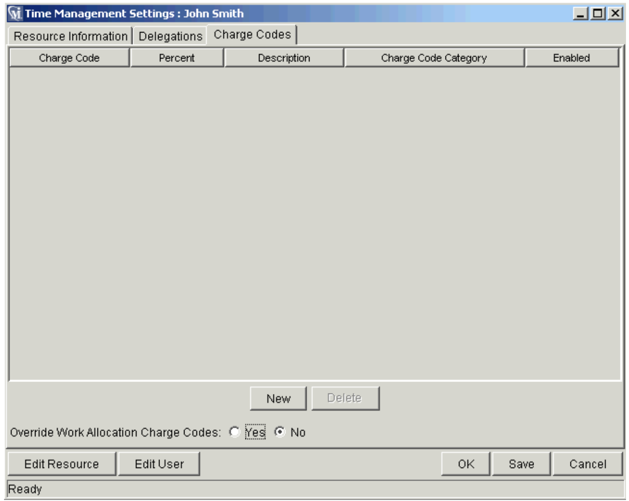
   The Time Management Settings window opens.

7. Click the **Charge Codes** tab.

   The Charge Code tab has the following fields:

Table 5-3.

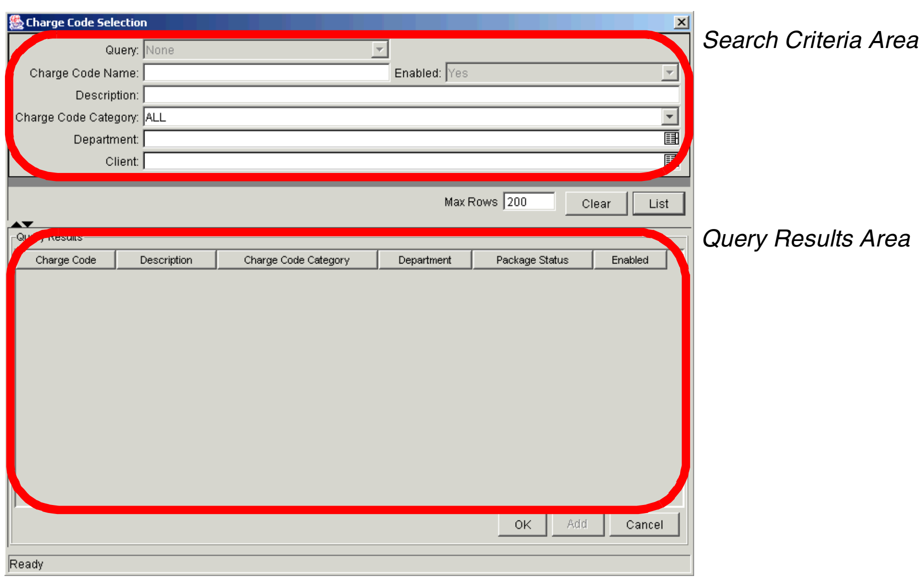
Field	Description
Charge Code	The name of the Charge Code.
Percent	The percent of time for each associated Charge Code. This column can be updated and must total 100 for the enabled Charge Codes.
Description	A description of the Charge Code.
Charge Code Category	The category of the Charge Code.
Enables	Shows if the Charge Code is enabled.



Note: To override an existing Work Allocation Charge Code with the Resource Charge Code, select Override Work Allocation Charge Code.

8. Click **New**.

   The Charge Code Selection window opens.



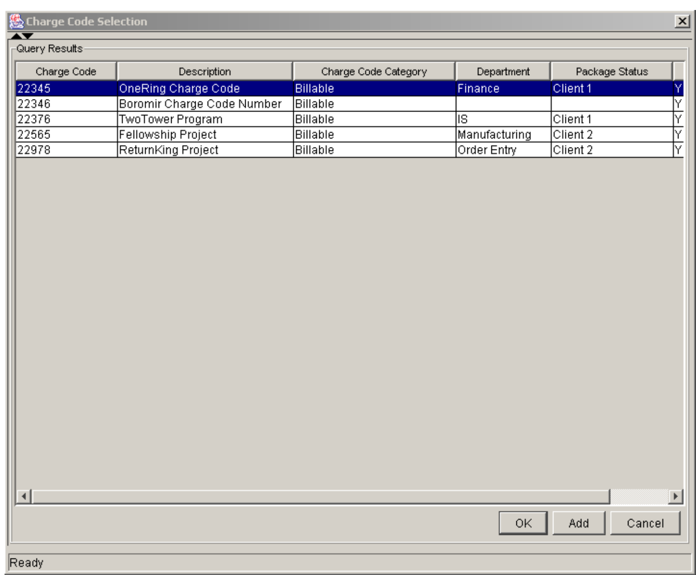
9. Enter search criteria for Charge Codes in the Search Criteria area as listed in *Table 5-4*.

Table 5-4. Charge Code Selection fields

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

10. Click **List**.

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



11. Select a Charge Code.

12. Click **OK** to add the Charge Code to the user and close the Charge Code Selection window.

13. Click **OK** to save the Charge Code information and close the Time Management Settings window.

Note

Charge Codes are created and maintained from the Charge Code Workbench. See *"Maintaining Charge Codes"* on page 53 for more detailed information concerning Charge Codes.

Chapter 6 Maintaining Activities

This chapter details procedures to configure and maintain Mercury Time Management Activities. An Activity is a type of work performed against a Work Item, such as documentation or testing.

This chapter covers the following topics:

- *"Creating an Activity"* on page 47
- *"Editing an Activity"* on page 49
- *"Deleting an Activity"* on page 50

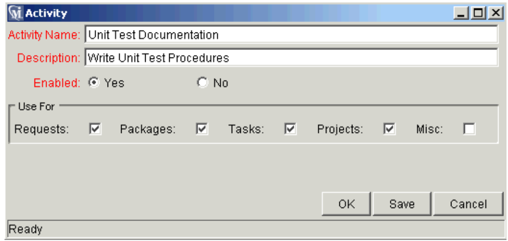
Creating an Activity

To create a new Activity:

1. Open the Workbench.
2. Click **Time Mgmt > Activities**.

   The Activity Workbench window opens.
3. Click **New Activity**.

   The Activity window opens.



4. Fill in all required fields and any optional fields as listed in *Table 6-1*.

Table 6-1. Activity fields

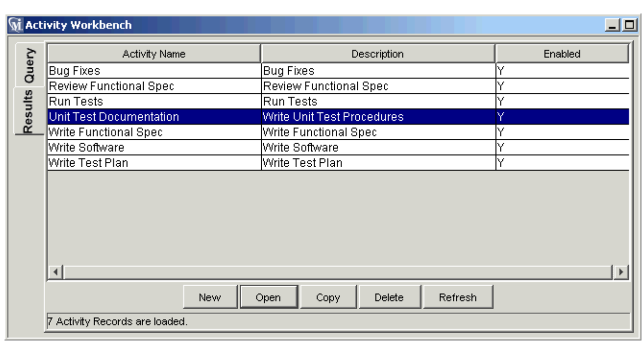
Field	Description
Activity Name	The unique name of the Activity.
Description	The displayed description of the Activity.
Enabled	Determines whether the Activity can be used in new Time Sheets.
Use For	Some categories are appropriate for only specific types of Work Items. Use this list of check boxes to indicate where the Activity can be used.

5. Click **OK** to save the Activity and close the Activity window.

   The **Results** tab of the Activity Workbench returns.

6. Click **Refresh** to verify the new Activity.

   The **Results** tab reloads and the new Activity is listed.



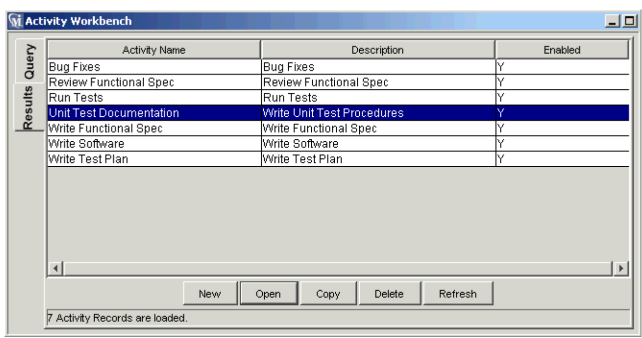
Editing an Activity

To edit an existing Activity:

1. Open the Workbench.
2. Click **Time Mgmt > Activities**.

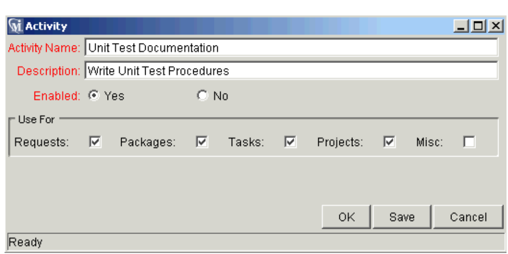
   The Activity Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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



6. Click **Open**.

   The Activity window opens.



7. Edit all required fields and any optional fields as listed in *Table 6-1*.

8. Click **OK** to save the changes to the Activity and close the Activity window.

Deleting an Activity

To delete an Activity:

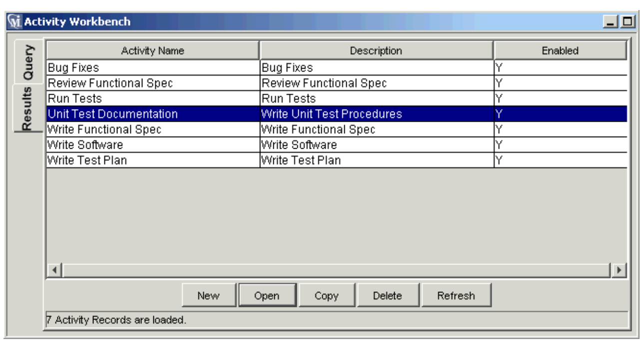
1. Open the Workbench.
2. Click **Time Mgmt > Activities.**

   The Activity Workbench window opens.

3. In the **Query** tab, enter the search criteria.
4. Click **List**.

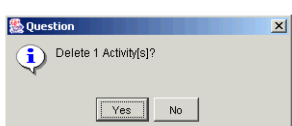
   The **Results** tab opens, displaying the results of the search. To display all Activities, click **List** without entering search criteria.

5. Select the Activity.



6. Click **Delete**.

   A Question Dialog opens.



7. Click **Yes** to delete the Activity.

Chapter

7

Maintaining Charge Codes

This chapter details procedures to configure and maintain Charge Codes. Charge Codes are entities used as links between Work Items and charge accounts.

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

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

This chapter covers the following topics:

- *"Charge Code Behavior"* on page 54
- *"Creating a Charge Code"* on page 54
- *"Editing a Charge Code"* on page 55
- *"Deleting a Charge Code"* on page 56

Note

In order for newly-created Charge Codes to be visible to a user, that user must be a member of a Security Group with Restrict Charge Codes to the following rules unchecked in the **Charge Codes** tab or that user must have the appropriate rules configured to allow access.

Charge Code Behavior

Default Charge Codes can be set for a Time Sheet line according to the following order of precedence:

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

2. **Setting the Charge Codes according to the Resource defaults.**
   The **Charge Codes** tab in the Time Management Settings window allows a user to set default Charge Codes for a Resource. In the absence of Work Allocation Charge Codes, the default Charge Codes for a Resource are set for every Time Sheet line added to a Time Sheet. However, if Work Allocation Charges Codes exist, the Override Work Allocation Charge Codes flag in the Resource's Time Management Settings determines which Charge Codes are applied.

3. **Setting the Charge Codes according to the Override Rules.**
   The last way to set Charge Codes is with Override Rules. If a Rule matches the criteria of the Time Sheet and Charge Codes are present as outputs of the Rule, those Charge Codes are applied (if none have been applied yet). The Rule takes precendence over Resource Charge Codes and Work Allocation Charge Codes if the appropriate Override flags are set.

Creating a Charge Code

To create a new Charge Code:

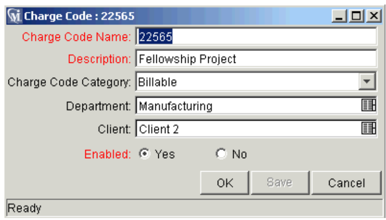
1. Open the Workbench.

2. Click **Time Mgmt > Charge Code**.

The Charge Code Workbench window opens.

3. Click **New Charge Code**.

   The Charge Code window opens.



4. Fill in all required fields and any optional fields as listed in *Table 7-1*.

Table 7-1. Charge Code fields

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

5. Click **OK** to save the Charge Code and close the Charge Code window.

Editing a Charge Code

To edit an existing Charge Code:

1. Open the Workbench.

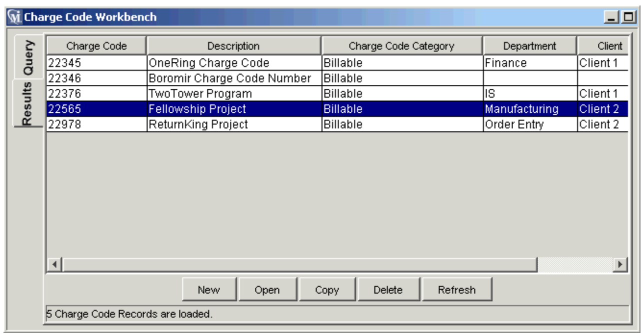
2. Click **Time Mgmt > Charge Code**.

The Charge Code Workbench window opens.

3. In the **Query** tab, enter the search criteria.

4. Click **List**.

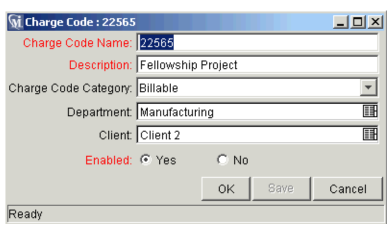
   The **Results** tab opens, displaying the results of the search. To display all of the Charge Codes, click **List** without entering search criteria.



5. Select a Charge Code.

6. Click **Open**.

   The Charge Code window opens.



7. Edit the fields as listed in *Table 7-1*.

8. Click **OK** to save the changes to the Charge Code and close the Charge Code window.

Deleting a Charge Code

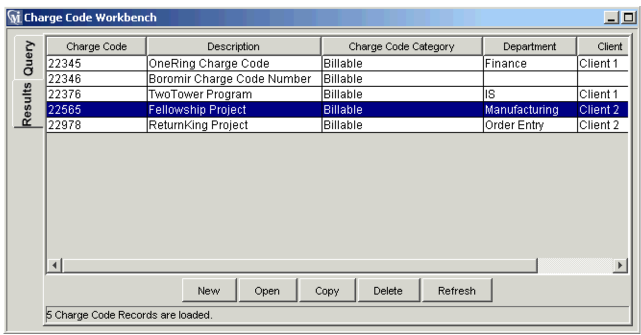
To delete a Charge Code:

1. Open the Workbench.
2. Click **Time Mgmt > Charge Code**.

   The Charge Code Workbench window opens.

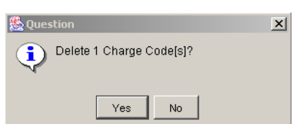
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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



5. Select the Charge Code.
6. Click **Delete**.

   A Question Dialog opens.



7. Click **Yes** to delete the Charge Code.

Chapter 8

Maintaining Override Rules

This chapter details procedures to configure and maintain Override Rules. Override Rules are defined rules that can supersede default Time Sheet rules or attributes. For example, an Override Rule can set a specific billable Cost Rate for anyone working on a specific Work Item.

This chapter covers the following topics:

Override Rule Behavior

Override Rules are designed to "override" default cost rates and other default cost-related attributes. To initiate an Override Rule, the attributes of a Time Sheet line, or the attributes of the User, must equal an Override Rule's dependencies.

Example

For example, *Figure 8-1* shows a Time Sheet line's Work Item Type, Work Item Set and Work Item meet the dependencies of the Override Rule. The result is that the Override Rule Cost Rate ($75 an hour) and Charge Code (4455) are used for the hours recorded on that Time Sheet line.

All Override Rules have two parts:

- Dependencies
  The attributes required to initiate an Override Rule.
- Results
  The resulting action when an Override Rule's dependencies are met.

All of an Override Rule's dependencies must be met to invoke the Override Rule. If two or more Override Rules apply to a Time Sheet's line, the Override Rule with the highest precedence takes effect. See *"Override Rule Precedence"* on page 61 for detailed information concerning Override Rule precedence.

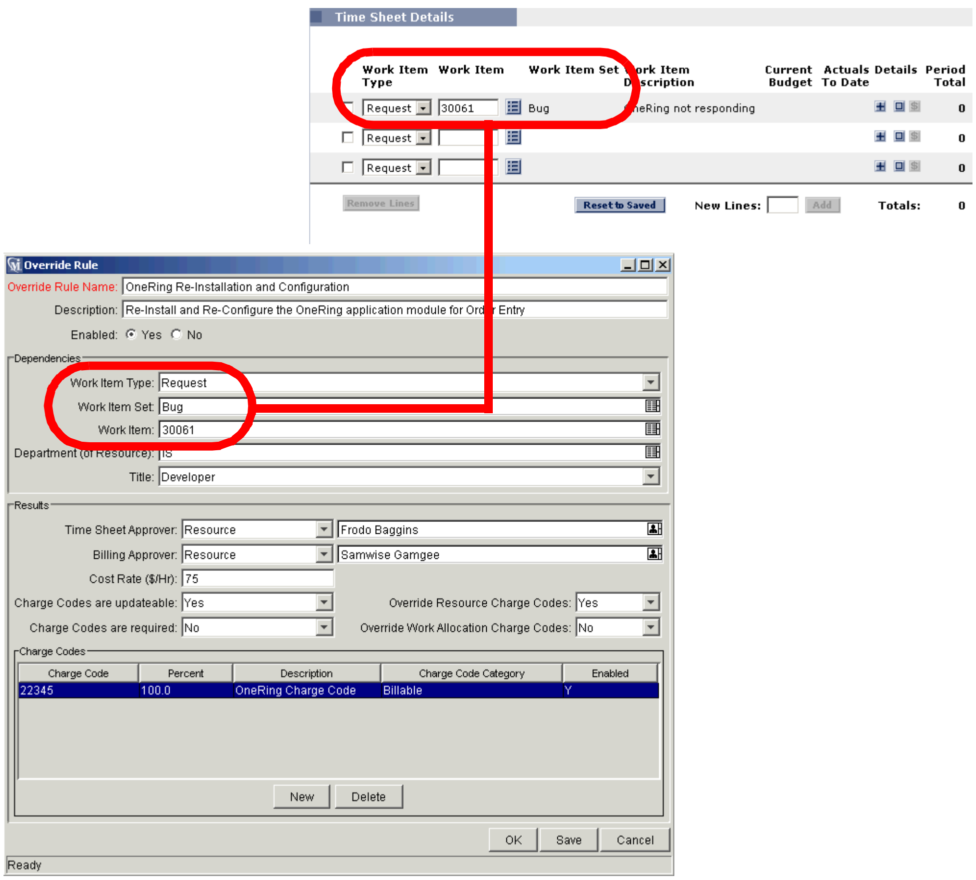


Figure 8-1 Override Rule and Time Sheet

All Override Rule results do not take effect at the same time. Result attributes take effect at difference times of the Time Management process. *Table 8-1* lists attributes and when the Override Rule result takes effect.

Table 8-1. Attributes Set by Override Rules

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

Note

Since Time Sheets are not approved line-by-line, approval overrides only take effect when all Work Items have the save approver. Approvals for all lines must match to change the approval defaults.

Override Rule Precedence

All of an Override Rule's dependencies must be met to invoke an Override Rule. If two or more Override Rules are met, the Override Rule with the highest precedence takes effect.

Override Rule precedence is based on which dependencies, and how many dependencies, are included in the Override Rule. For example, an Override Rule with five dependencies has a higher precedence value than an Override Rule with only one dependency. *Table 8-2* displays the order of Override Rule precedence and the required Override Rule dependencies.

Table 8-2. Override Rule Precedence

Precedence	Work Item Type	Work Item Set	Work Item	Department	Title
1	X	X	X	X	X
2	X	X	X	X	
3	X	X	X		X

Table 8-2. Override Rule Precedence [continued]

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

Override Rule Precedence - Dependencies

Override Rule dependencies are met by the attributes of the Time Sheet line and by the attributes of the user. Consider the following cases and the dependencies listed in *Table 8-3*.

Table 8-3. Precedence Example One - Dependencies

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

Case One
An engineer from Development is working on the **Project Doc Test 1**. The dependencies for both Override Rule 1 (Work Item Type and Work Item) and

Override Rule 2 (Work Item Type and Department) are met. Since Override Rule 1 has a higher Precendence, the engineer's Cost Rate is set to **$95.00**.

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

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

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

Override Rule Precedence - Results

If a results field of a Override Rule is not set (left blank), other matching Override Rules with less precedence can fill-in the blank result fields. Consider the previous cases and the Override Rule results listed in *Table 8-4*.

Table 8-4. Precedence Example Two - Results

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

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

Case Two
The accountant from Finance met the dependencies for Override Rule 1 only.

The accountant's default Charge Code is used. The accountant's Cost Rate is set to **$95.00**.

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

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

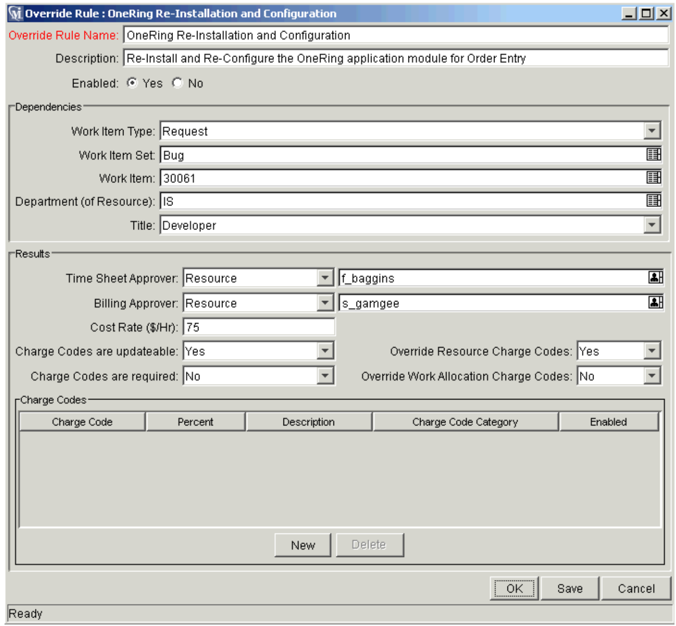
Creating Override Rules

To create a new Override Rule:

1. Open the Workbench.
2. Click **Time Mgmt > Override Rules**.

   The Override Rule Workbench window opens.
3. Click **New Override Rule**.

   The Override Rule window opens.



4. Fill in all required fields and any optional fields as listed in *Table 8-5*.

Table 8-5. Override Rule fields

Field	Description
Override Rule Name	The name of the Override Rule.
Description	The description of the Override Rule.
Enabled	Determines whether the Override Rule is enabled or not.
Dependencies	
Work Item Type	Override Rule checks the Time Sheet lines for a specific Work Item Type (Request, Package, Project, Task or Miscellaneous).
Work Item Set	Override Rule checks the Time Sheet lines for a specific Work Item Set, which can be a specific Request Type, a specific Master Project, or a specific Package Workflow. This field is dependent on the Work Item Type value.
Work Item	Override Rule checks the Time Sheet lines for a specific Work Item, which can be a specific Request, a specific Package, a specific Project, Miscellaneous Item, or a specific Task. This field is dependent on the Work Item Set value.

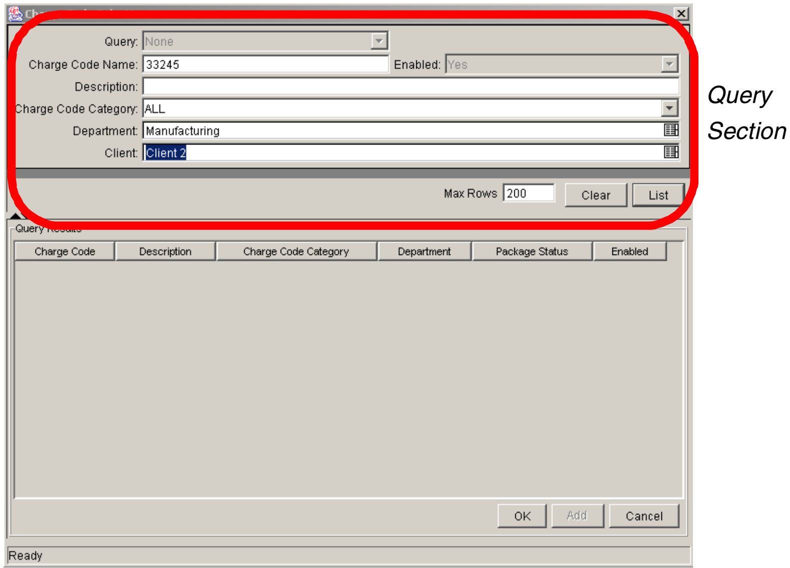
Table 8-5. Override Rule fields [continued]

Field	Description
Department (of Resource)	Override Rule checks the Time Sheet lines for a specific Department.
Title	Override Rule checks the Time Sheets for Resources with a given Title.
Results	
Time Sheet Approver	These two fields set the override Time Sheet approval information.
Billing Approver	These two fields set the override billing approval information (i.e. who can freeze and close a Time Sheet).
Cost Rate	Sets the cost rate (in dollars per hour) to use when calculating cost against a work item.
Charge Codes are updateable	Sets whether the Charge Codes are updateable after they have been entered by the Rule.
Override Resource Charge Codes	Sets whether to override Charge Codes that have been defaulted by the **Charge Codes** tab in the Resource's Time Management Settings window.
Charge Codes are required	Sets whether the Charge Codes are required after the Rule is executed.
Override Work Allocation Charge Codes	Sets whether to override Charge Codes that have been defaulted by the Work Allocation.
Charge Codes	
Charge Code	The Charge Code or Codes assigned to the Override Rule.
Percent	The percentage of Charge Code or Codes assigned to the Override Rule. The total percentage must equal 100 percent.
Description	The description of the Charge Code or Codes assigned to the Override Rule.
Charge Code Category	The category of the Charge Code or Codes assigned to the Override Rule.
Enabled	Displays whether or not the Charge Code or Codes assigned to the Override Rule are enabled.

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

   The Charge Code Selection window opens.

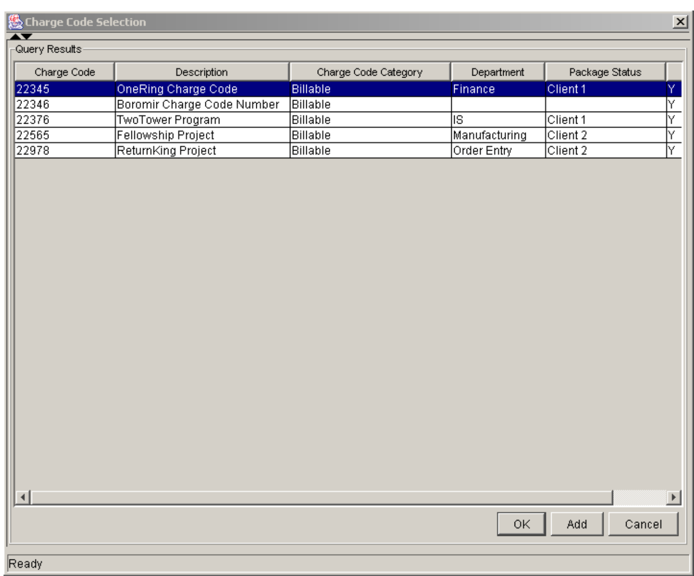
6. Enter any search criteria in the appropriate fields in the **Query** section.



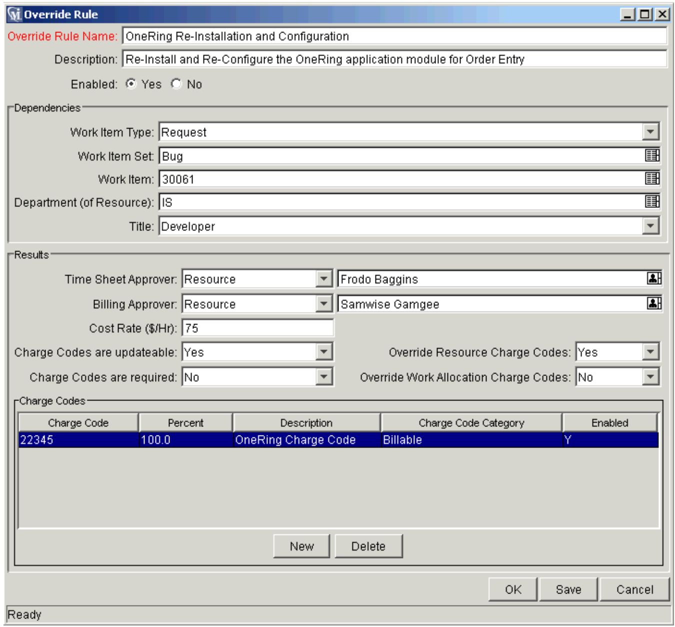
7. Click **List**.

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

8. Select the Charge Code.



9. Click **OK** to add the Charge Code to the Override Rule and close the Charge Code Selection window.



10. Click **OK** to save the changes and close the Override Rule window.

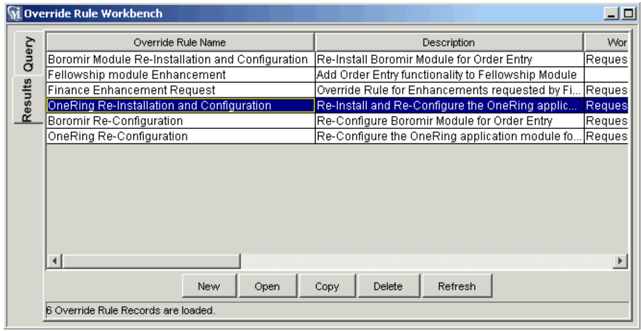
Editing Override Rules

To edit an Override Rule:

1. Open the Workbench.
2. Click **Time Mgmt > Override Rules**.

   The Override Rule Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

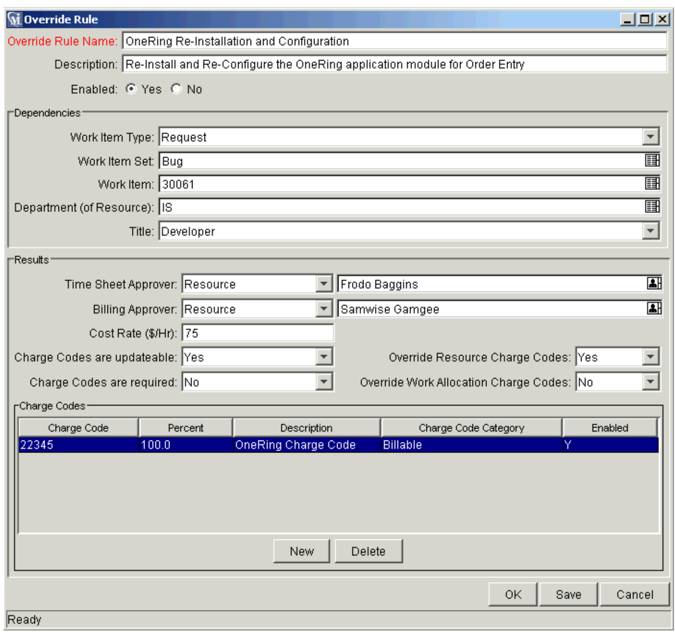
   The **Results** tab opens, displaying the results of the search. To display all Override Rules, click **List** without entering search criteria.



5. Select the Override Rule.

6. Click **Open**.

   The Override Rule window opens.



7. Edit the required fields and any optional fields as listed in *Table 8-5*.

8. Click **OK** to save the changes and close the Override Rule window.

Deleting Override Rules

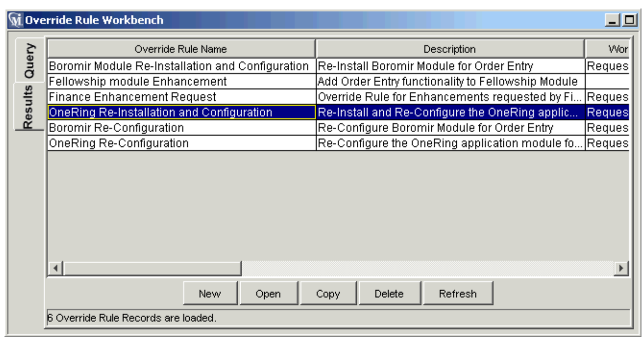
To delete an Override Rule:

1. Open the Workbench.
2. Click **Time Mgmt > Override Rules**.

   The Override Rule Workbench window opens.

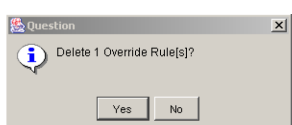
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

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



5. Select the Override Rule.
6. Click **Delete**.

   A Question Dialog opens.



7. Click **Yes** to delete the Override Rule.

Chapter 9

Creating and Maintaining Configurable Filters

This chapter details the information and procedures required to configure and maintain the Mercury Time Management configurable Work Item filters. When creating a Work Allocation or Time Sheet, the Work Item filters help control the number of displayed Work Items (Requests, Projects, Tasks, and Packages).

This chapter covers the following topics:

Filter Behavior

The Work Item filters limit the Work Item auto-complete list on Work Allocations or Time Sheets. *Figure 9-1* illustrates a typical Time Sheet with the Work Item auto-complete list and the Work Item filters.

The following sections list the filters of the Work Item Filters section:

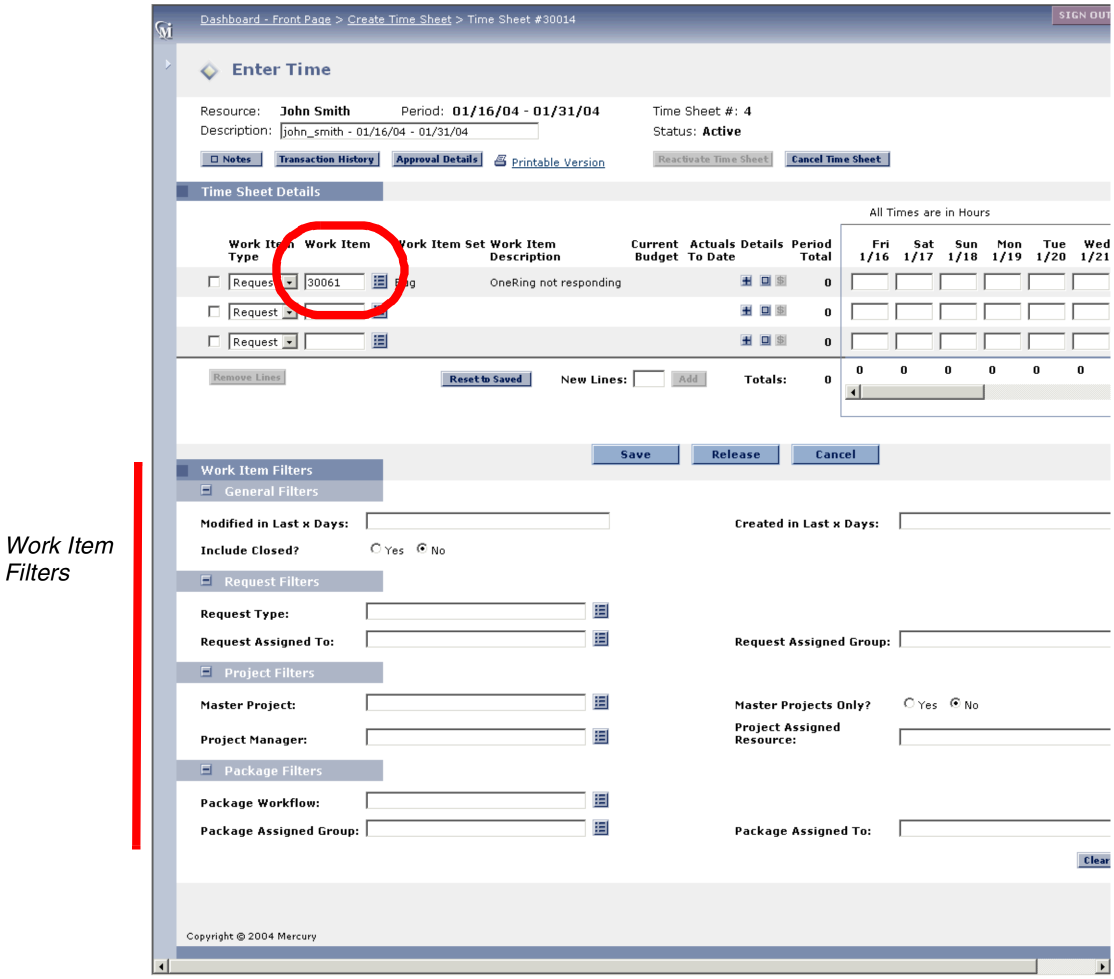


Figure 9-1 Time Sheet

General Filters

General filters are non-task specific filters. *Table 9-1* lists the general filters.

Table 9-1. General Filters

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

Table 9-1. General Filters [continued]

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

Request Filters

Request filters are Request Work Item Type-specific filters. *Table 9-2* lists the Request filters.

Table 9-2. Request Filters

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

Package Filters

Package filters are Package Work Item Type-specific filters. *Table 9-3* lists the Package filters.

Table 9-3. Package Filters

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

Project Filters

Project filters are Project Work Item Type-specific filters. *Table 9-4* lists the Project filters.

Table 9-4. Project Filters

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

Adding a Filter Field

This section details how to add a filter to the Work Item filters. The Work Item filters appear on the Create Allocations page and Time Sheet page. See *Figure 9-1* for an example of a typical Time Sheet page with the Work Item filters.

This section covers the following topics:

Note

Modifications to the Time Management Work Item filters should be done with the help of Mercury ITG Professional Services.

Updating the database requires privileges a DBA might not want to grant to the application administrator.

Adding a Filter Field Overview

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

- Create a new SQL Validation to include the SQL for the new Work Item filter. The Time Management SQL Validations are seeded data and can not be edited. Creating a new SQL Validation requires the following steps:
    - Copy an existing Validation.
    - Edit the copied Validation to include SQL for the new filter field.

    See *"Modifying the SQL Validation"* on page 76 for complete instructions on how to change the SQL Validation for the Work Item filters.
- Add the new filter field to the Work Item filters. Adding the new filter field to the Work Item filters requires editing the TMG Configurable Filters Request Type. See *"Adding a New Filter Field to the Request Type"* on page 78.
- Update the database. See *"Updating the Database Tables"* on page 81.
- Verify the new filter. See *"Verifying the New Filter Field"* on page 83.

Before You Begin

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

- The name of the new SQL Validation. The name of the new SQL Validation depends on whether the new filter field is being added to the Work Allocations page or Time Sheet Details page. For example:
    - TMG - Work Allocation Work Bench - Work Item
      might become
      TMG - Work Allocation Work Bench - Work Item New

    - TMG - Time Sheet Details - Work Item
      might become
      TMG - Time Sheet Details - Work Item New

- The SQL to support the new filter field. Knowledge of SQL and system internals is required to write the SQL for the new filter field.
- The name of the new filter field, such as My Creation Date.
- The Token for the new filter field, such as MY_CREATION_DATE. When editing the SQL code in the SQL Validation, add the FLTR prefix to the Token name, such as FLTR.MY_CREATION_DATE.

Note

For complete information concerning SQL Validations, see the "Validations" appendix in *Configuring a Request Resolution System* or *Configuring a Deployment System (Change Management)* for more detailed information.

Modifying the SQL Validation

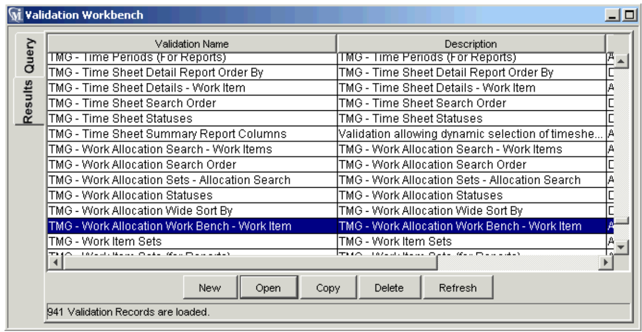
This section details how to modify the Work Item filter's SQL Validation. The SQL Validation must be copied from the existing SQL Validation and edited with new SQL code to support the new filter field.

To modify the filter SQL Validation:

1. Open the Workbench.
2. Click **Configuration > Validation**.

   The Validation Workbench window opens.
3. In Validation Name, enter "TMG".
4. Click **List**.

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



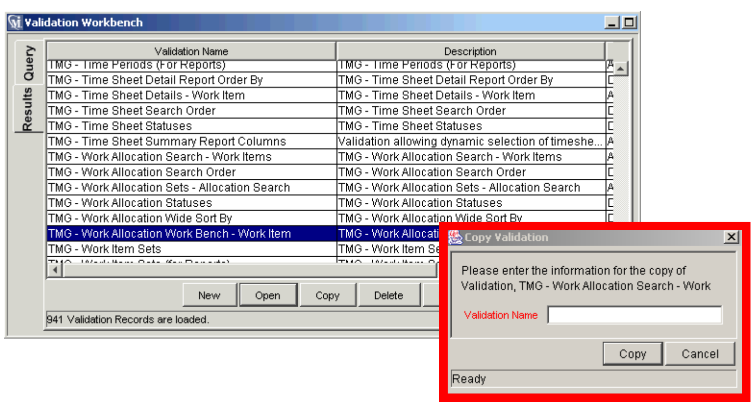
5. Select the proper Validation.

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

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

6. Click **Copy** to copy the Validation.

   The Copy Validation window opens.



7. In the Validation Name field, enter the name of the new Validation.

   The following lists the possible names for the new Validation:

   - TMG - Work Allocation Work Bench - Work Item New

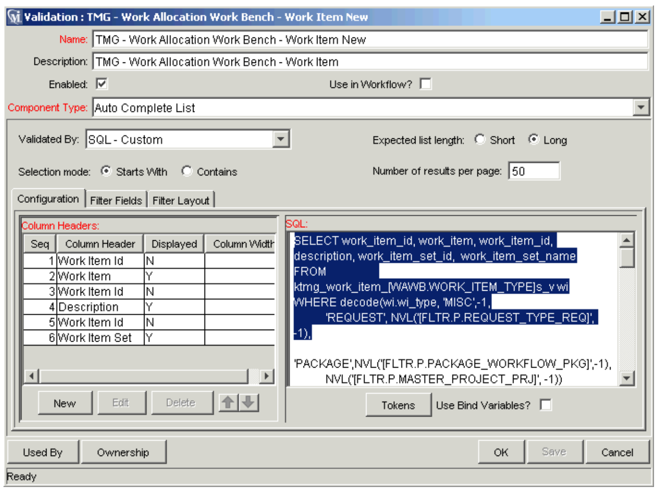
- TMG - Time Sheet Details - Work Item New

8. Click **Copy**.

   A Question Dialog opens.

9. Click **Yes** to open the Validation window.

   The Validation window opens.



10. Edit the SQL.

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

Note

Modifications to the Time Management Work Item filters should be done with the help of Mercury ITG Professional Services.

11. Click **OK** to save the changes and close the Validation window.

Adding a New Filter Field to the Request Type

To add a new filter field to the Request Type:

1. Open the Workbench.

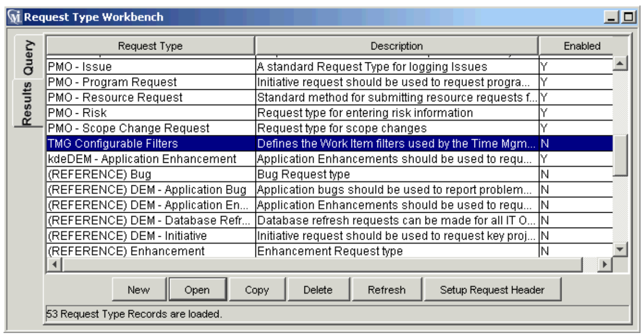
2. Click **Demand Mgmt > Request Types**.

   The Request Type Workbench window opens.

3. In Request Type, enter **TMG**.

4. Click **List**.

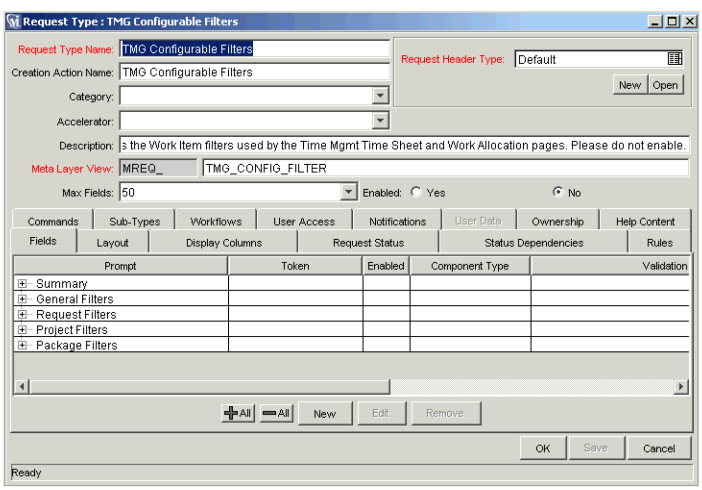
   The **Results** tab opens with Time Management Request Types loaded.



5. Select the TMG Configurable Fields Request Type.

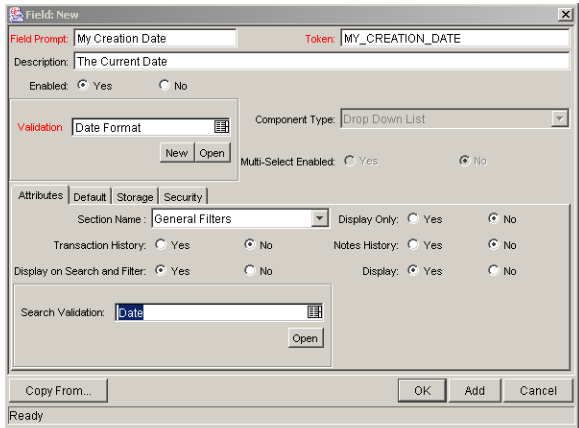
6. Click **Open**.

   The Request Type window opens.



7. In the **Fields** tab, click **New**.

The Field: New window opens.



8. Specify the new filter field using the fields listed in *Table 9-5*.

Table 9-5. Field fields

Field	Description
Field Prompt	The name of the new filter field, such as “My Creation Date”. This field name appears in the Work Item Filters section.
Token	The Token for the new field, such as MY_CREATION_DATE. This Token must be the same as the Token added to the SQL statement in *“Modifying the SQL Validation”* on page 76.
Enabled	Enable the field for use. Yes enables the field. No disables the field.
Validation	The Validation for the new filter field. This Validation is for the Validation for the Work Item Filter field. The section, *“Modifying the SQL Validation”* on page 76, creates the Validation for the Work Item auto-complete list. Depending on the selection, this field enables the Component and Multi-select fields.
Component	The type of field, such as drop-down list or text field. This field is enabled by the Validation field.
Multiselect	Can multiple entries be selected from this field. This field is enabled by the Validation field.

Note

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

9. Click the **Attributes** tab.

10. Specify the attributes of the new filter field as described in *Table 9-6*.

Table 9-6. Attributes fields

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

11. Click **OK** to save the new field and close the Field window.

12. Click **OK** to save the changes to the Request Type and close the Request Type window.

Updating the Database Tables

The database tables KNTA_VALIDATION_PROFILES and KNTA_FIELD_FILTERS must be updated to reference the new SQL Validation.

Note

Updating the database tables requires privileges a DBA might not want to grant to the application administrator.

To update the database tables:

1. Logon to the system.

2. Connect to the database containing the database schema.

3. Determine the validation_id for the new SQL Validation. Run the following:

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

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

Example

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

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

4. Update the KNTA_VALIDATION_PROFILES and KNTA_FIELD_FILTERS tables to refer to the created Validations.

The component names for the Work Item fields on the respective pages are:

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

Update the KNTA_VALIDATION_PROFILES table by running the following SQL:

For updating the Work Item component on the Work Allocations page:

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

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

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

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

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

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

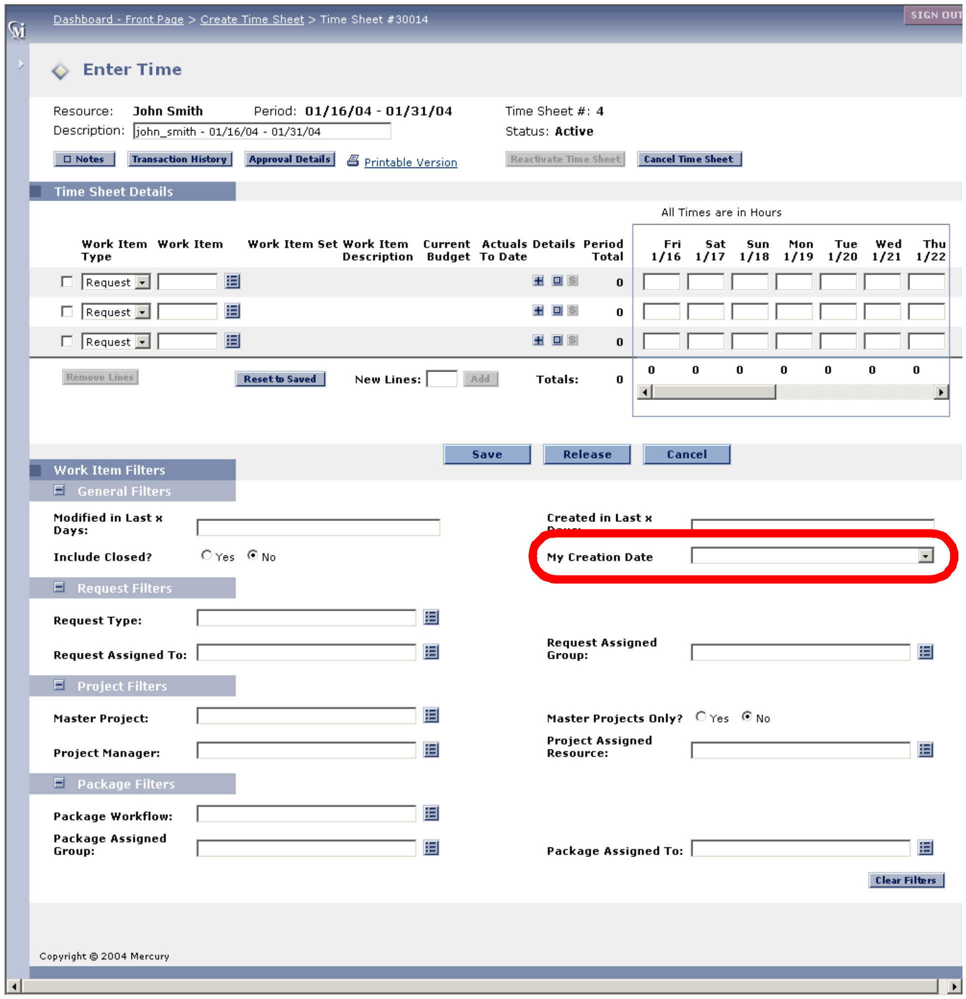
Note

The original Validation ID is stored in the column original_validation_id if the changes need to be reverted.

Verifying the New Filter Field

Verify the new filter field:

1. Log onto Time Mgmt.
2. Open a Timesheet.



3. Check the results of the Work Item auto-complete list.
4. Enter a value in the new filter field.
5. Re-check the results of the Work Item auto-complete list.

   The list of Work Items should be shorter.

Chapter 10

Maintaining Time Management Validations

Mercury Time Management includes several Time Management Validations that can be customized to meet specific business requirements. Validations determine the acceptable input values for fields, such as the acceptable Work Items to include on a Time Sheet.

This chapter covers the following topics:

Time Management Validation Overview

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

- **TMG - Charge Code Categories - Enabled**
  The categories of available Charge Codes. Charge Code categories can be used to restrict Charge Code access. The seeded Charge Code category values are:
  - Billable

- Non-Billable

- **TMG - Clients - Enabled**
  A list of available clients, typically internal or external customers, or both. Client is an attribute of a Charge Code used to restrict Charge Code access. The seeded Client values are:
  - Client 1
  - Client 2

- **TMG - Misc. Work Items**
  A list of possible miscellaneous and un-trackable Work Items such as Vacation or Meetings. The seeded Miscellaneous Work Item Values are:
  - Vacations
  - Meetings
  - Other

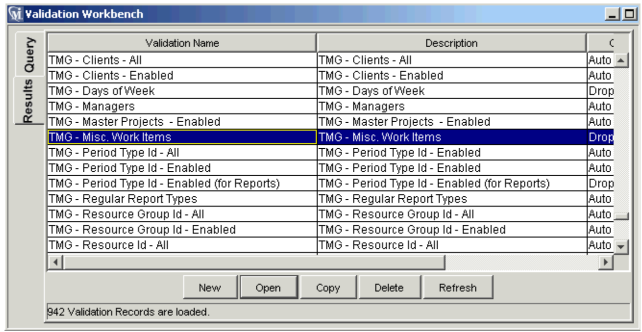
Opening a Time Management Validation

To open a Time Management Validation:

1. Open the Workbench.
2. Click **Configuration > Validation**.

   The Validation Workbench window opens.
3. In Validation Name, enter **TMG**.
4. Click **List**.

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



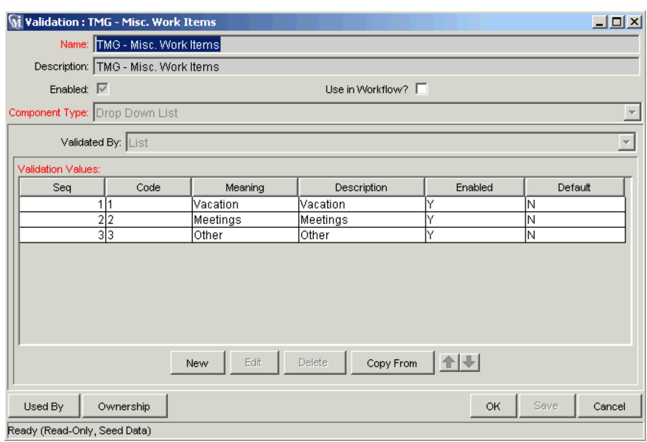
5. Select the Time Management Validation.

   The customizable Time Management Validations are:

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

6. Click **Open**.

   The Validation window opens with the values of the Validation.



Once the Validation is open, values can be added, edited or deleted. See the following sections to customize the Validation:

- *"Adding a New Validation Value"* on page 88

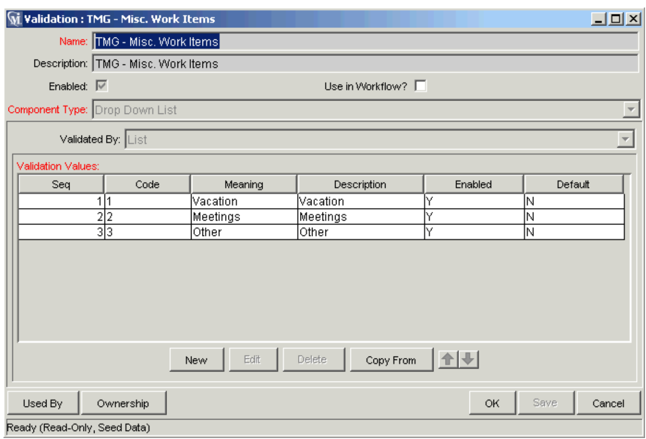
- *"Editing an Existing Validation Value"* on page 89
- *"Deleting an Existing Validation Value"* on page 90
- *"Copying a Validation Value from a Different Validation"* on page 91

Adding a New Validation Value

To add a new Validation value:

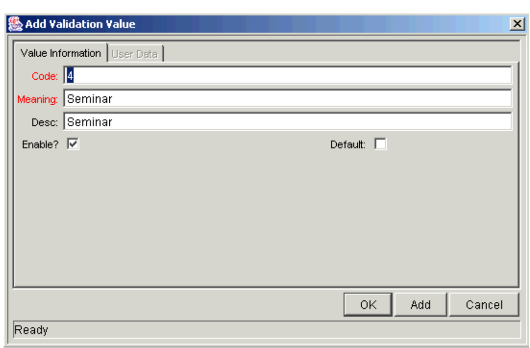
1. Open a Time Management Validation.

   See *"Opening a Time Management Validation"* on page 86. The Validation window opens.



2. Click **New** to create a new Validation Value.

   The Add Validation Value window opens.



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

Note

Code field entries must be unique.

4. Click **OK** to add the new value to the Validation and close the Add Validation Value window.

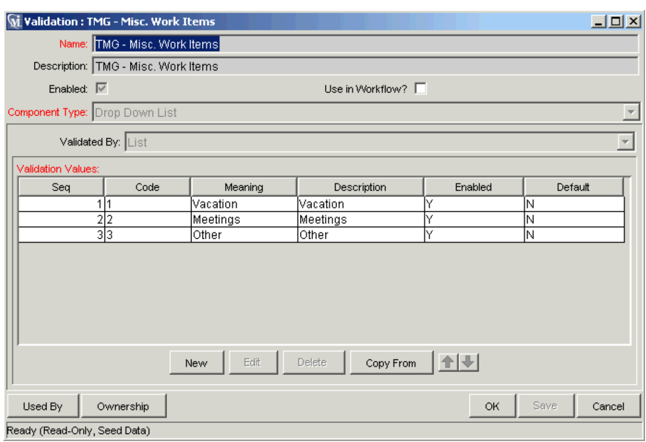
5. Click **OK** to save the changes to the Validation and close the Validation window.

Editing an Existing Validation Value

To edit an existing Validation Value:

1. Open a Time Management Validation.

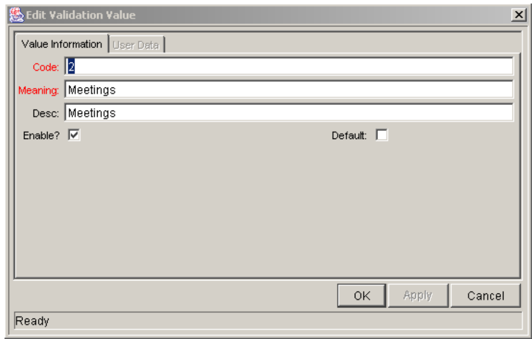
   See *"Opening a Time Management Validation"* on page 86. The Validation window opens.



2. Select the existing value to edit.

3. Click **Edit**.

The Edit Validation Value window opens.



4. Edit any or all fields.

Note

Code field entries must be unique.

5. Click **OK** to save the changed Value and close the Edit Validation Value window.

   The Validation window opens with the changed Validation Value.

6. Click **OK** to save the changes to the Validation and close the Validation window.

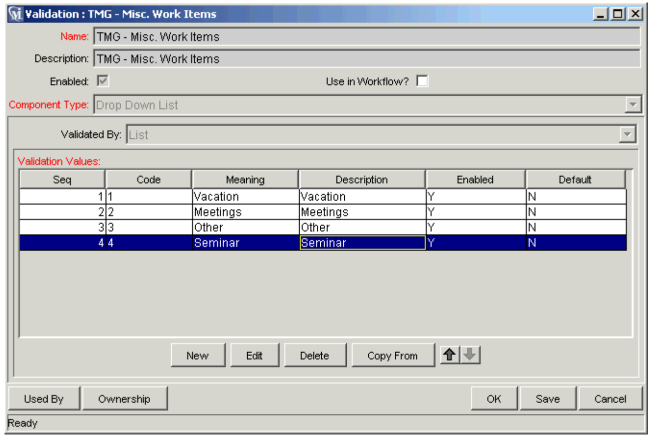
Deleting an Existing Validation Value

To delete an existing Validation value:

1. Open a Time Management Validation.

   See *"Opening a Time Management Validation"* on page 86. The Validation window opens.

2. Select the value to delete.



3. Click **Delete.**

   The selected Value is deleted.

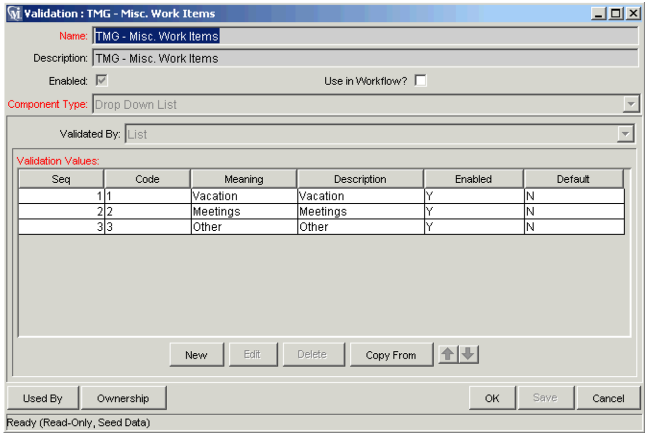
4. Click **OK** to save the changes to the Validation and close the Validation window.

Copying a Validation Value from a Different Validation

To copy a Validation value from a different Validation:

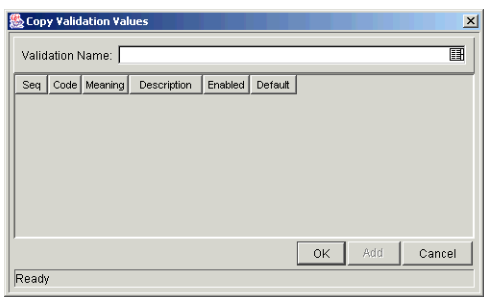
1. Open a Time Management Validation.

   See *"Opening a Time Management Validation"* on page 86. The Validation window opens.



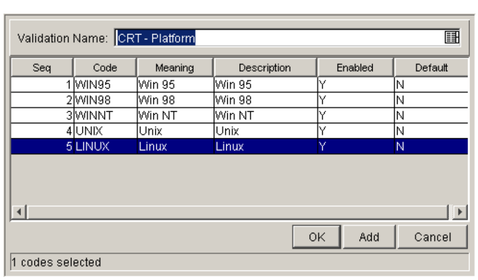
2. Click **Copy From**.

   The Copy Validation Value window opens.



3. In the Validation Name field, select the Validation containing the Validation Value to be copied.

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

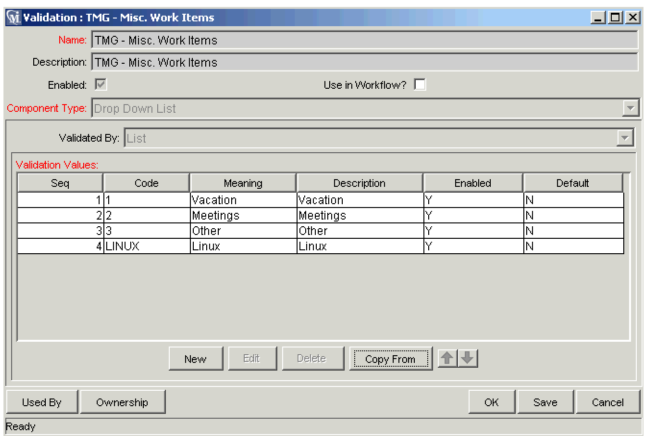


4. Select the Value to copy.

> **Note**
>
> Code field entries must be unique.

5. Click **OK**.

   The selected Validation Value is copied to the Validation window and the Copy Validation window closes.



6. Click **OK** to save the changes to the Validation and close the Validation window.

Chapter 11 Integrating Mercury Time Management with Mercury Project Management

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

For example, if Time Management is not integrated with Project Management, Actual Effort (Time) spent on a project is manually entered on the Task Details page. The Actual Effort (Time) then appears on the Project Details page. However, when Time Management is integrated with Project Management, actual time is entered on a Time Sheet, which automatically updates the Project Details page. *Figure 11-1* illustrates the Project Details page with a Task Details page and the Time Sheet.

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

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

Note

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

For more detailed information on effort and cost in Project Management, see *Managing Your Projects (Project Management)*.

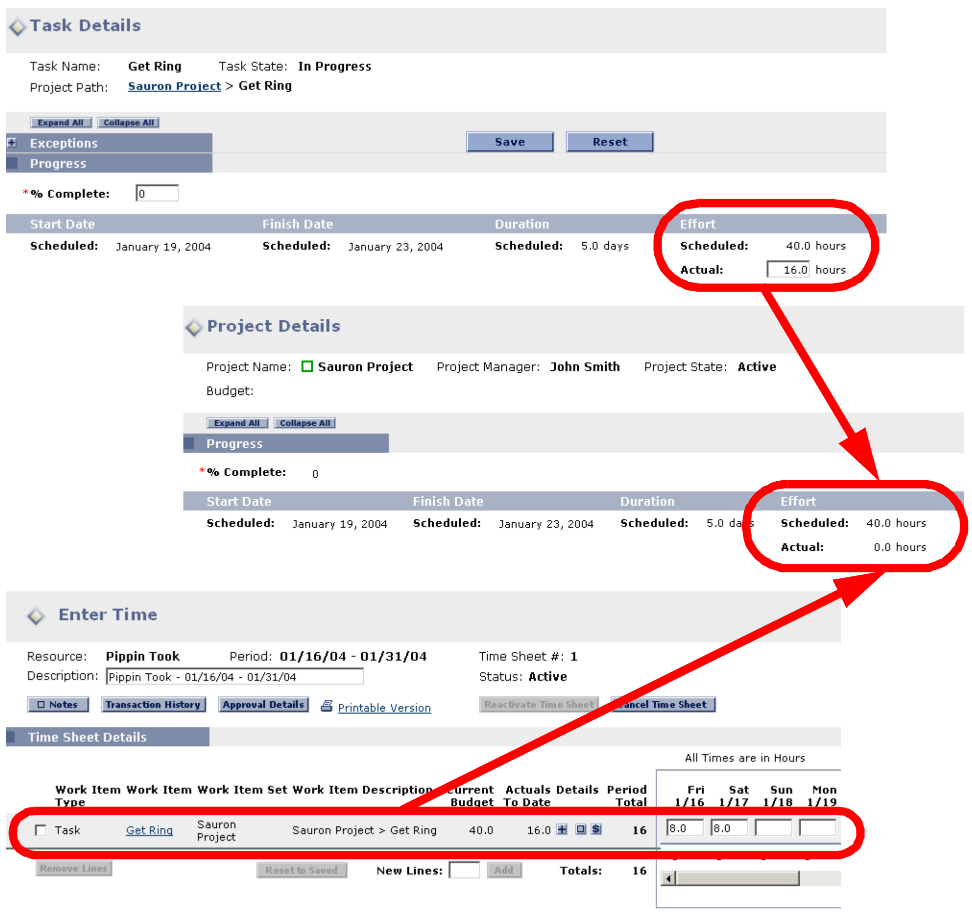


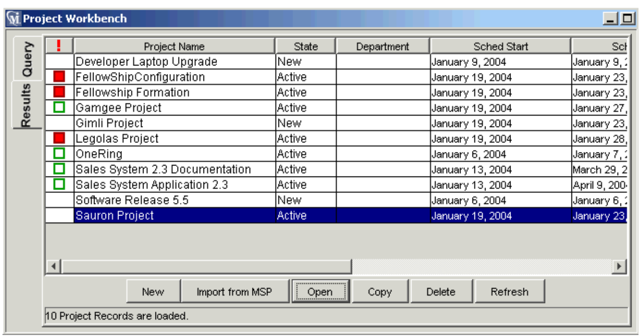
Figure 11-1 A Time Sheet Updating the Project Details Page

To integrate Time Management and Project Management:

1. Open the Workbench.
2. Click **Project Mgmt > Projects**.

   The Project Workbench window opens.
3. In the **Query** tab, enter the search criteria.
4. Click **List**.

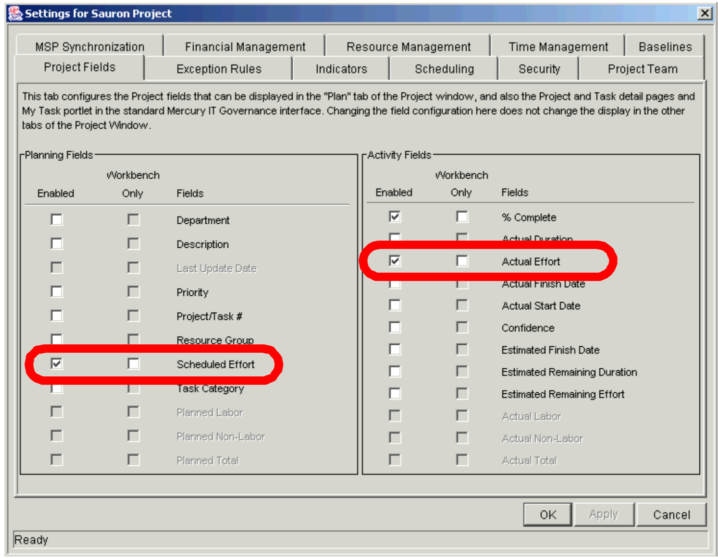
   The **Results** tab opens, displaying the results of the search. To display all Projects, click **List** without entering search criteria.
5. Select a Project.



6. Click **Open**.

   The Project window opens.
7. On the toolbar, click **Project > Settings**.

   The Settings window opens.
8. Verify Scheduled Effort and Actual Effort are selected.



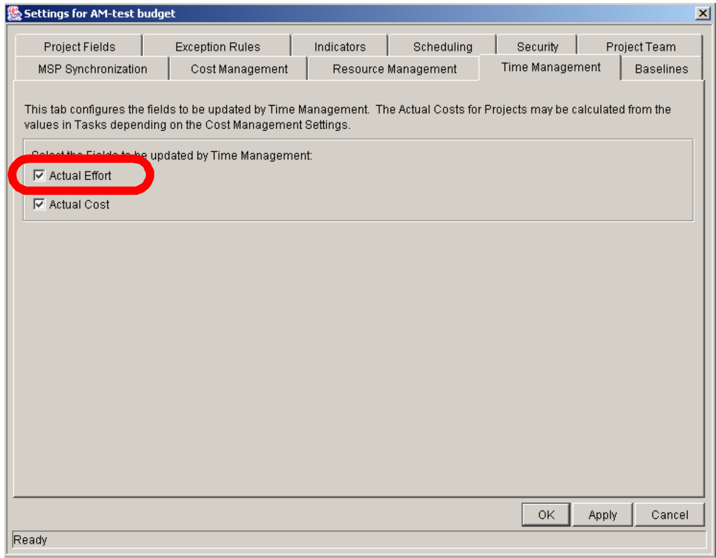
9. Click the **Time Management** tab.

10. Select the fields to be updated by Time Sheets:

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

Note

If Cost Management is not enabled for the Project, the Actual Cost option is not selectable.



11. Click **OK** to save the changes and close the **Time Management** tab.

12. Click **OK** to save the changes to the Project and close the Project window.

Chapter

12

Time Management Portlets and Reports

This chapter details the Portlets and Reports of Mercury Time Management. Time Management provides information in real-time through the Mercury ITG Dashboard.

This chapter covers the following topics:

- *"Time Management Portlet Overview"* on page 101
- *"Time Management Report Overview"* on page 103

Time Management Portlet Overview

This section details the Time Management Portlets. Time Management provides information in real-time through the Mercury ITG Dashboard. Time Management Portlets are available with a Time Management license.

Table 12-1. Time Management Portlets

Time Management Portlets	Description
My Time Sheets	Lists all the Time Sheets (except cancelled Time Sheets) for the owner of the Dashboard. This Portlet is similar to the My Requests and My Packages Portlets but does not have parameters.
My Work Items	Lists all the Work Items on open Time Sheets for the owner of the Dashboard. This Portlet gives a quick snapshot of what has been worked on and where time is charged. This Portlet is similar to the My Requests and My Packages Portlets but does not have parameters.

Table 12-1. Time Management Portlets [continued]

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

Table 12-1. Time Management Portlets [continued]

Time Management Portlets	Description
TMG - Work Item Set Budgets and Actuals	Displays summary information at the Work Item Set level. This Portlet is useful to get a snapshot of which projects or types of activities the users are spending the most time on as well as where the most time is budgeted. Values are for the entire project to date (as opposed to period-by-period). This Portlet is intended to provide Dashboard-level oversight into the status of a group of projects. The intended audience is PMO staff or external stakeholders. For this Portlet, the budgeted values for cost and hours are drawn from a Budget, not from a project baseline. Actuals for costs are gathered from the Budget.

Time Management Report Overview

This section details all of the Time Management Reports. All of these Reports are database based programs which create textual reports viewed through a Web browser.

Table 12-2. Time Management Reports

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

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