KINTANA™

Configuring the Kintana Dashboard

Version 5.0.0

Publication Number: DashboardConfig-0603A

Kintana Version 5.0.0

Kintana, Inc.
1314 Chesapeake Terrace, Sunnyvale, California 94089
Telephone: (408) 543-4400
Fax: (408) 752-8460
http://www.kintana.com

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Chapter 1 Introduction

Intended for large and complex environments, Kintana Dashboard™ provides 360° visibility and control over technology-based initiatives and IT operational tasks. Configurable, role-based visual displays called "portlets" provide relevant summary information and highlight exception conditions in Kintana-managed initiatives. Users can then drill down to any desired level of detail.

Kintana Dashboard is beneficial to all participants throughout the Technology Chain. For example, developers can use Kintana Dashboard to view all of their own action items, and end-users can consult their own Dashboards to see the status of all the Requests they have submitted.

This document provides instructions for configuring custom portlets and setting a Default Dashboard for all Kintana users.

Note

Knowledge of SQL is required for users who want to create or configure a custom portlet.

This chapter discusses the following topics:

- *About This Document*
- *Additional Resources*

About This Document

This section provides an overview of this document, who should read this document and what types of information are included. The following lists the main topics found in this section:

- *Who Should Read This Guide*

- *How to Use This Guide*

Who Should Read This Guide

This document provides details concerning the definition and creation of custom Kintana portlets, as well as configuring a Default Dashboard.

This business application guide is used primarily by:

- Business users who configure and maintain portlets in Kintana
- Technical users who configure and maintain portlets in Kintana

Note

Users must have a Power license to access the screens and windows described in this document. Users must also belong to a Security Group with the correct access grants.

This document does not provide information relevant to Personalizing a portlet. Personalizing a portlet refers to customizing a specific portlet to display only specific information. Each portlet can be edited (or personalized) to display only the information relevant to a specific Project, Task, Package, or Request.

How to Use This Guide

This document provides background information and details for defining custom portlets and a Default Dashboard in Kintana. Navigate to one of the following chapter topics or use the Index to find information related to key words.

- *Introduction*:
  Provides an overview of this document.
- *Key Concepts*:
  Describes the key concepts of the Kintana Dashboard and portlets, including: the Dashboard page, portlets, the menu and navigation, personalization and Dashboard templates.
- *Portlets*:
  Describes how to build portlets, edit portlets, delete portlets and add portlets to the Kintana Dashboard. The *Portlets* chapter also provides information concerning the PORTLET DETAIL REPORT and the portlet migrator.
- *Default Dashboard*:
  Provides step-by-step instructions on how to create a Default Dashboard page.

- *System Portlets*:
  Lists all of the available system portlets.
- *Example: Creating a Portlet*
  Provides step-by-step instructions on how to build an example portlet.

Additional Resources

Kintana provides the following additional resources to help you successfully implement, configure, maintain and fully utilize your Kintana installation:

- *Kintana Documentation*
- *Kintana Services*
- *Kintana Education*
- *Kintana Support*

Kintana Documentation

Kintana product documentation is linked from the Kintana Library page. This page is accessed by:

- Selecting **HELP > KINTANA LIBRARY** from the Kintana Workbench menu.
- Selecting **HELP > CONTENTS AND INDEX** from the menu bar on the HTML interface. You can then click the **KINTANA LIBRARY** link to load the full list of product documents.

Kintana organizes their documents into a number of user-based categories. The following section defines the document categories and lists the documents currently available in each category.

- *Kintana Business Application Guides*
- *User Guides*
- *Kintana Application Reference Guides*
- *Kintana Instance Administration Guides*
- *External System Integration Guides:*
- *Kintana Solution Guides*
- *Kintana Accelerator Guides*

Kintana Business Application Guides

Provides instructions for modeling your business processes in Kintana. These documents contain process overviews, implementation instructions, and detailed examples.

- Configuring a Request Resolution System (Create)
- Configuring a Deployment and Distribution System (Deliver)
- Configuring a Release Management System
- Configuring the Kintana Dashboard
- Managing Your Resources with Kintana
- Kintana Reports

User Guides

Provides end-user instructions for using the Kintana products. These documents contain comprehensive processing instructions.

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide
- Navigating the Kintana Workbench:
  Provides an overview of using the Kintana Workbench
- Navigating Kintana:
  Provides an overview of using the Kintana (HTML) interface

Kintana Application Reference Guides

Provides detailed reference information on other screen groups in the Kintana Workbench. Also provides overviews of Kintana’s command usage and security model.

- Reference: Using Commands in Kintana

- Reference: Kintana Security Model

- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

Kintana Instance Administration Guides

Provides instructions for administrating the Kintana instances at your site. These documents include information on user licensing and archiving your Kintana configuration data.

- Kintana Migration
- Kintana Licensing and Security Model

External System Integration Guides:

Provides information on how to use Kintana's open interface (API) to access data in other systems. Also discusses Kintana's Reporting meta-layer which can be used by third party reporting tools to access and report on Kintana data.

- Kintana Open Interface

Kintana Solution Guides

Provides information on how to configure and use functionality associated with the Kintana Solutions. Each Kintana Solution provides a User Guide for instructions on end-use and a Configuration Guide for instructions on installing and configuring the Solution.

Kintana Accelerator Guides

Provides information on how to configure and use the functionality associated with each Kintana Accelerator. Kintana Accelerator documents are only provided to customers who have purchased a site-license for that Accelerator.

Note

Kintana provides documentation updates in the Download Center section of the Kintana Web site (http://www.kintana.com/support/download/download_center.htm).

A username and password is required to access the Download Center. These were given to your Kintana administrator at the time of product purchase. Contact your administrator for information on Kintana documentation or software updates.

Kintana Services

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

http://www.kintana.com/services/services.shtml

Kintana Education

Kintana has created a complete product training curriculum to help you achieve optimal results from your Kintana applications. Learn more about our Education offering from our Web site:

http://www.kintana.com/services/education/index.shtml

Kintana Support

Kintana provides web-based interactive support for all products in the Kintana product suite via Contori.

http://www.contori.com

Login to Contori to enter and track your support issue through our quick and easy resolution system. To log in to Contori you will need a valid email address at your company and a password that will be set by you when you register at Contori.

Chapter
2
Key Concepts

This chapter details key concepts and definitions to help the user understand and configure the Kintana Dashboard and the Kintana portlets. The following lists these key concepts found in this document:

- *Default Dashboard*
- *System Portlets Versus Custom Portlets*
- *Building a Portlet*
- *Users Who Should Build Portlets*
- *Portlet Security and Licensing*
- *Retrieving Data from External Sources*

Default Dashboard

The advanced user can define a Default Dashboard page for all Kintana users. This Default Dashboard page is the first Dashboard page seen when logging onto the Kintana interface.

The use of a Default Dashboard page saves a user the time normally required to add and configure a page. After initially logging in, the user can personalize this page, adding and deleting portlets as necessary. For more information concerning the Default Dashboard, see the chapter *"Default Dashboard"* on page 41.

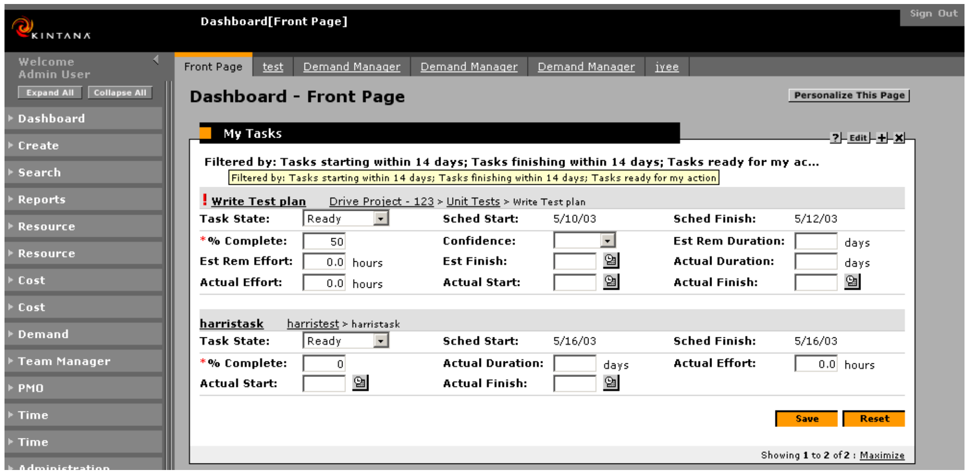


Figure 2-1 Typical Kintana Dashboard and Dashboard Page

System Portlets Versus Custom Portlets

System portlets are shipped with each Kintana installation. These system portlets are “seeded” in the Kintana system and cannot be edited or used as a basis for a new custom portlet.

Example

The REQUEST LIST portlet is a system portlet. It cannot be copied or edited to create a new portlet. A custom portlet that might be created could be an ‘Internal IS Requests’ portlet. See *“Example: Creating a Portlet”* on page 59 for an example procedure for building such a portlet.

Custom portlets are created from scratch by advanced users using the Kintana Workbench. Both system and custom portlets can be accessed and personalized on the Kintana Dashboard by the end user.

Building a Portlet

Portlets are created using the PORTLET WORKBENCH found under the **DASHBOARD** screen group. From the PORTLET WORKBENCH, an advanced user configures the queries and display parameters of the portlet, retrieving data from the Kintana system through SQL queries. *Figure 2-2* illustrates the DASHBOARD screen group.

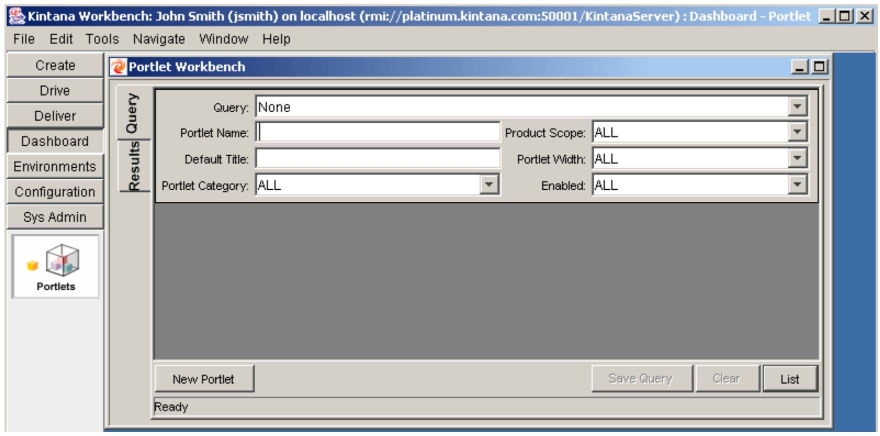


Figure 2-2 Dashboard Screen Group

Filter Fields

Filter fields appear on a portlet's edit page. These filter fields are used by the end user to personalize what data is to be displayed on a specific portlet on a specific Dashboard page. For example, on one Dashboard page, the REQUEST LIST portlet can be configured to display all Requests and on another Dashboard page the REQUEST LIST portlet can be configured to display only closed requests. *Figure 2-3* illustrates typical filter fields.

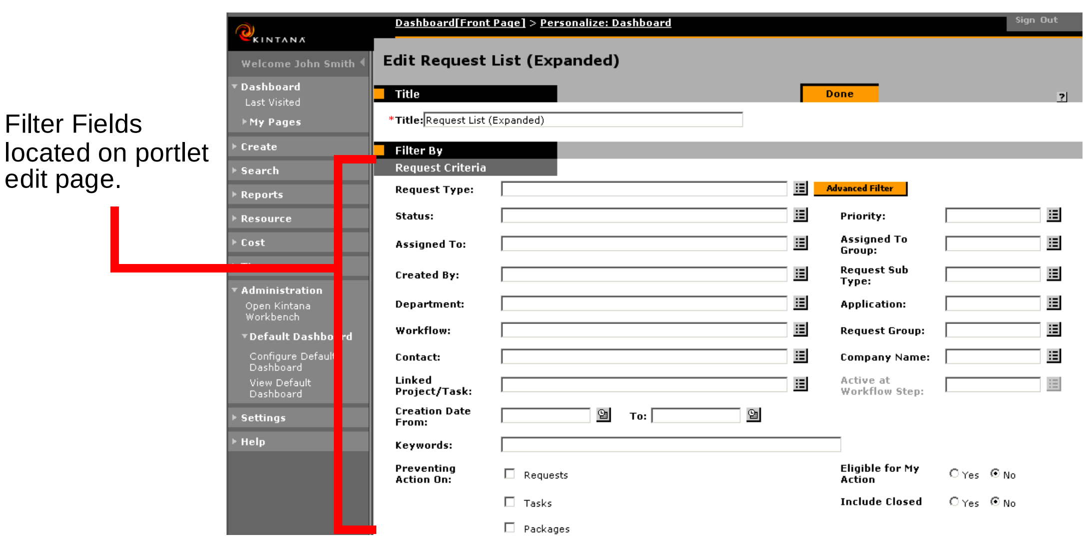


Figure 2-3 Filter Field on Edit Page

When constructing a custom Portlet, the advanced user must define the filter fields that will appear on the custom portlet's edit page. Filter fields are defined from the PORTLET window in the Kintana Workbench. The **FILTER FIELDS** tab is shown in *Figure 2-4*.

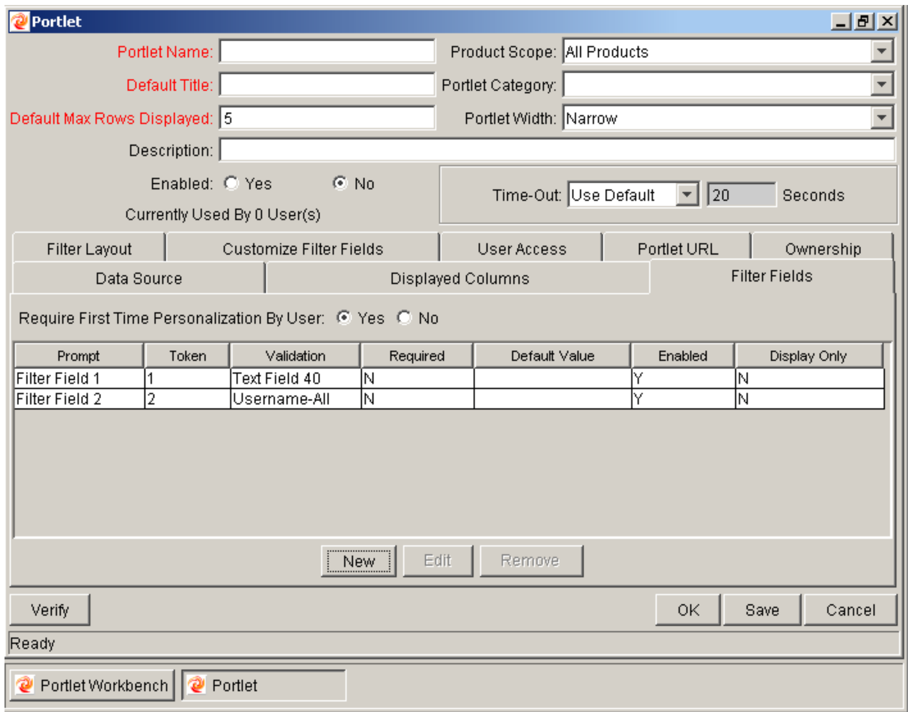


Figure 2-4 Filter Fields Tab

Users Who Should Build Portlets

Building custom portlets involves creating SQL queries accessing information from the Kintana database. Therefore, Kintana recommends that only advanced users with SQL and Oracle database experience build or configure portlets.

Portlet Security and Licensing

A Kintana user can only access portlets that are associated with the Kintana products licensed at that site and those Kintana products have been licensed for the user's use. In addition, the advanced user can restrict portlet access through the use of security groups and user access restrictions.

Security groups and user access restrictions are configured by using the **USER ACCESS** tab on the PORTLET window in the Kintana Workbench. A user who is not a member of a Security Group specified in the **USER ACCESS** tab will not see the portlet in their list of available portlets. See *"Portlet Security"* on page 28 for more information. See *Figure 2-5* for an illustration of the **USER ACCESS** tab of the PORTLET window.

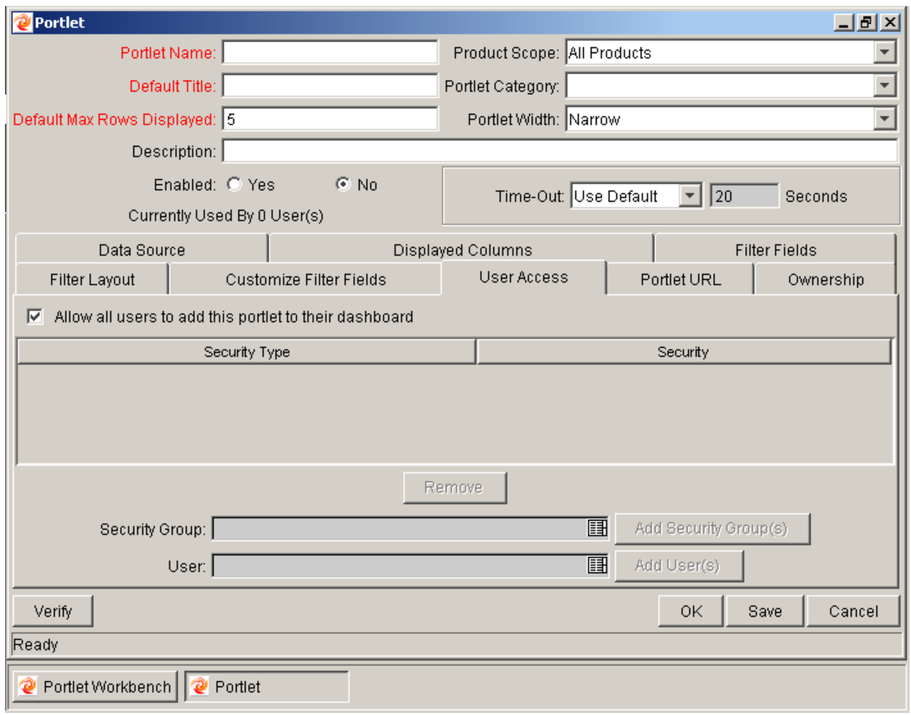


Figure 2-5 Portlet Window - User Access

Retrieving Data from External Sources

Portlets can display data from any external database accessible from the Kintana system. This can be done using the **SELECT/FROM** tab of the QUERY DEFINITION window. Include database links to external sources' tables and/or views in the FROM clause, following standard SQL formats.

Chapter 3 Portlets

The Kintana interface provides visibility into real-time data from the Kintana system while work is in progress. This data is presented through portlets. Portlets are visual displays that act as windows into different aspects of Kintana data. While portlets are customizable by end-users, they can be create by an advanced user to display any desired data. This chapter discusses how custom portlets can be created to meet the business needs of an organization.

The following sections discuss portlet creation, configuration and maintenance in more detail:

- *"Building Portlets"* on page 15
- *"Enabling Portlet Use"* on page 32
- *"Portlet Maintenance"* on page 36

Building Portlets

The following sections discuss the process of creating and configuring portlets:

- *"Before Building a Portlet"* on page 16
- *"Creating a Portlet"* on page 16

> **Note**
>
> Knowledge of SQL is required for users who want to create or configure portlets.
> For a detailed example procedure for building a portlet, see *"Example: Creating a Portlet"* on page 59.

Before Building a Portlet

Before building a portlet, the user needs to know what information to display and how to display the information. The following list provides some guidelines to help determine what information is required and how best to display the information:

- What type of information needs to be captured in this portlet? For this example, we would like to display the Request Number, Request Type, Description, Created By User, Assigned User, Priority, Progress (which is a custom field on the Request type), and Current Condition (which is an item of Request User Data).
- What additional requirements are there? Are any visual indicators needed (hyperlinks, Tooltips)? For example, should the Request Numbers be hyperlinked, so users can click on the links to go to Request Detail pages directly. Since the Progress field in this example (a custom field) has a percentage as data, we would like to display the column as progress bars for better visual representation. For Created By Users and Assigned Users, we would like to see more information as Tooltips when the user mouses over the usernames. In this case, the Tooltips should include the user's full name and email address. The field Current Condition (the Request User Data) has values of Red, Yellow or Green, so we would like to display them as colorful icons.
- What are the database columns for the information to display, and from which tables? This information bears most directly on the SQL query that will serve as the portlet's "back end," retrieving and displaying data. What is the criteria necessary to link the database tables.
- What possible filter fields would end users find most helpful?
- Is a JSP page being built for the portlet? Only very advanced Kintana users with extensive knowledge of JSP should create their own JSP pages for portlets.

Creating a Portlet

This section provides an overview of creating a portlet. See the referenced sections for detailed procedures. The user can also proceed directly to the desired procedure using the following list. To create a new portlet:

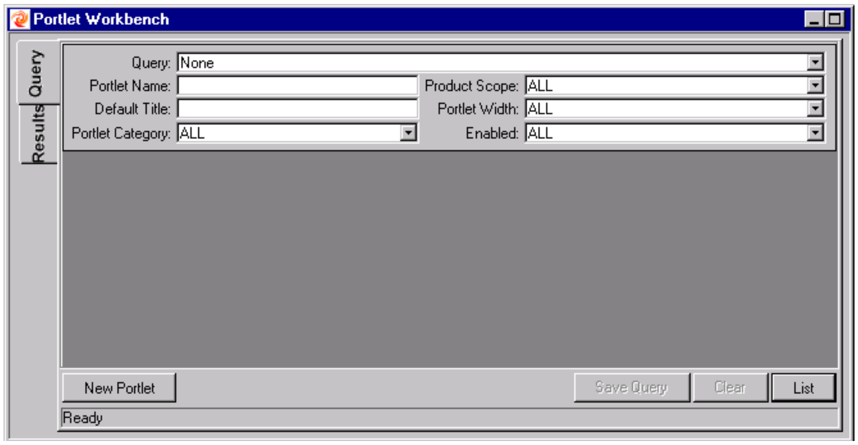
- Use the Kintana Workbench to open a new portlet window. See *"Creating the New Portlet"* on page 17 for more detailed information.

- Build the portlet SQL query. Use the QUERY DEFINITION window to build the SQL query that the portlet will use to retrieve and display data. See *"Building the Query"* on page 18 for more detailed information.
- Define the columns that are displayed in the portlet. Use the COLUMN DEFINITION window to modify the column's internal logic and appearance. See *"Defining the Portlet's Displayed Columns"* on page 23 for more detailed information. Repeat this step to create multiple portlet columns.
- Define the filter fields for the portlet's edit page. Use the FILTER FIELD DEFINITION window to configure the filter field's internal logic. See *"Defining Filter Fields"* on page 25 for more detailed information. Repeat this step to create additional portlet filter fields.
- Configure the filter field layout. See *"Laying Out Filter Fields"* on page 26 for more detailed information.
- Specify the Security Groups and users who can use the portlet. See *"Portlet Security"* on page 28 for more detailed information.
- (Optional) If desired, define the location of the portlet's JSP pages. See *"Portlet URL"* on page 29 for more detailed information.
- (Optional) If desired, specify the Ownership Groups and users who can copy, edit, or delete the portlet. See *"Setting Ownership for Portlets"* on page 30 for more detailed information.
- (Optional) It might be advantageous to require all Kintana users to personalize a portlet the first time they see it on their Dashboard. See *"Requiring First-Time Personalization"* on page 31 for more detailed information.
- Verify the portlet. Make sure the query's tokens and column interactions are correct. See *"Verifying the New Portlet"* on page 32 for more detailed information.

Creating the New Portlet

Portlets are created using the PORTLET window of the Kintana Workbench. To create a new portlet:

1. Open the Kintana Workbench.
2. In the **DASHBOARD** screen group, click the **PORTLETS** icon. The PORTLET WORKBENCH window opens.

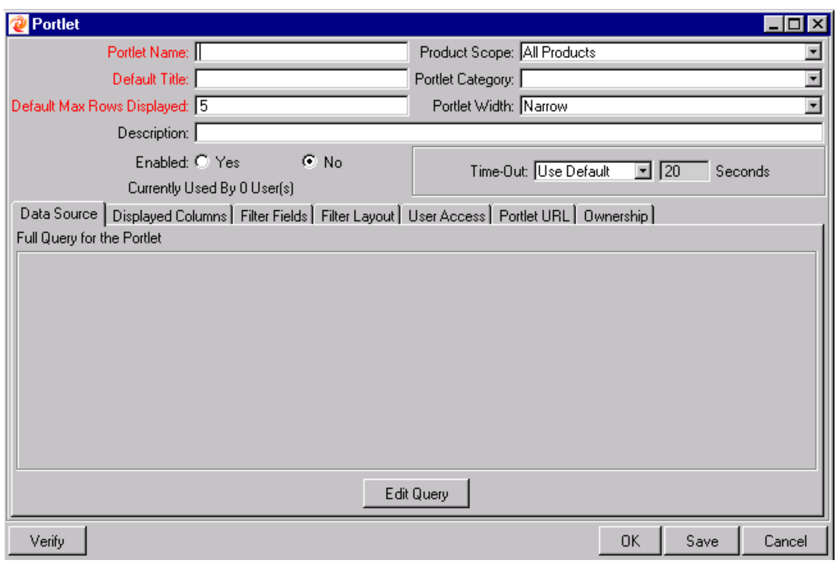


3. Click the **New Portlet** button. The Portlet window opens.

4. Enter data into all required fields. For field definitions, see <KAppRefGuide>.

5. Fill in any optional fields. For field definitions, see <KAppRefGuide>.

6. Click the **Save** button. The edits to the Portlet window are saved.



Building the Query

Kintana portlets use SQL queries to retrieve information from a database or table view. These queries are built from the Query Definition window. The Query Definition window's three tabs, **Select/From**, **Where/Filter**, and **Group**

BY/ORDER BY, assist with the construction of the SQL query. *Figure 3-1* illustrates an example of an SQL query for a portlet.

```
SELECT R.REQUEST_ID REQUEST_ID,
  R.REQUEST_NUMBER REQUEST_NUMBER,
  R.DESCRIPTION DESCRIPTION,
  R.CREATED_BY_USERNAME CREATED_BY_USERNAME,
  R.ASSIGNED_TO_USERNAME ASSIGNED_TO_USERNAME,
  R.PRIORITY_MEANING PRIORITY,
  RD.VISIBLE_PARAMETER1 PROGRESS,
  R.USER_DATA5 CURRENT_ CONDITION,
  U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' ||
U1.EMAIL_ADDRESS ASSIGNED_TO_USER_TOOLTIPS,
  U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' ||
U2.EMAIL_ADDRESS CREATED_BY_USER_TOOLTIPS,
FROM  KCRT_REQUEST_DETAILS RD,
        KNTA_USERS U1,
        KNTA_USERS U2,
KCRT_REQUESTS_V R
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
    AND RD.REQUEST_ID = R.REQUEST_ID
   AND R.BATCH_NUMBER = 1
   AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
   AND U2.USER_ID = R.CREATED_BY
   AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
     OR R.CREATED_BY = [SYS.USER_ID])
```

Configured by Select/From tab

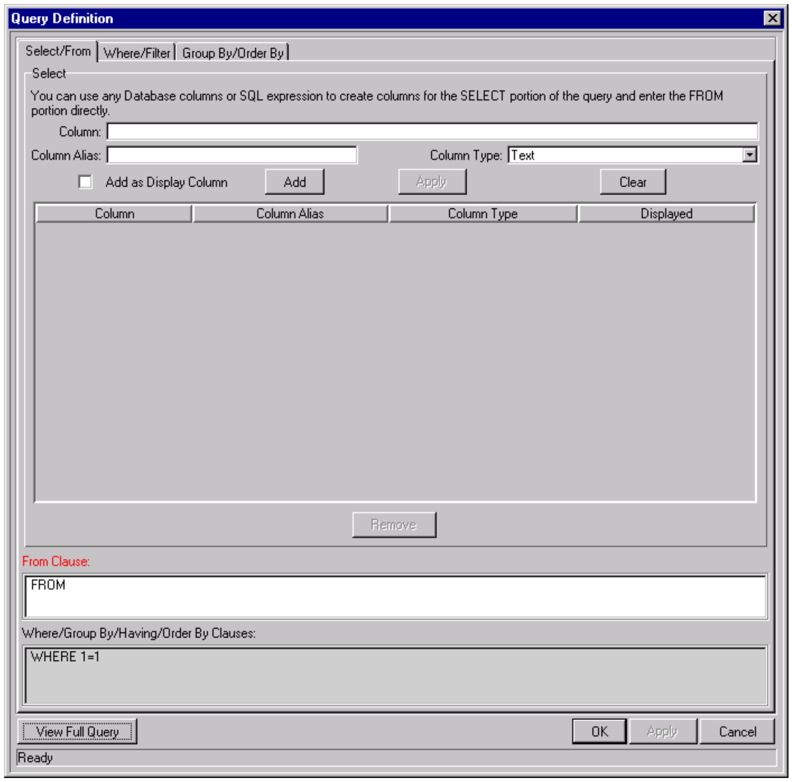
Configured by Where/Filter tab

Note: no Group By/Order By clauses

Figure 3-1 SQL Query Example

To build the query for a portlet:

1. In the PORTLET window, click the **DATA SOURCE** tab.
2. Click the **EDIT QUERY** button. The QUERY DEFINITION window opens.
3. In the **SELECT/FROM** tab, enter a database column or SQL expression into the COLUMN field.
4. Enter a column alias into the COLUMN ALIAS field. This column alias will be used in other parts of the portlet and must be unique.
5. Select the column data type from the **COLUMN TYPE** drop down list.



6. If the column is to be displayed in the portlet, select the **Add as Display Column** check box.

7. Click the **Add** button.

   - If the **Add as Display Column** check box is unchecked, the column is added to the table and the fields are cleared.

   - If the **Add as Display Column** check box is checked, the Column Definition window opens. See *"Defining the Portlet's Displayed Columns"* on page 23 for more detailed information on defining displayed columns.

8. Repeat steps *3* through *7* to add more columns.

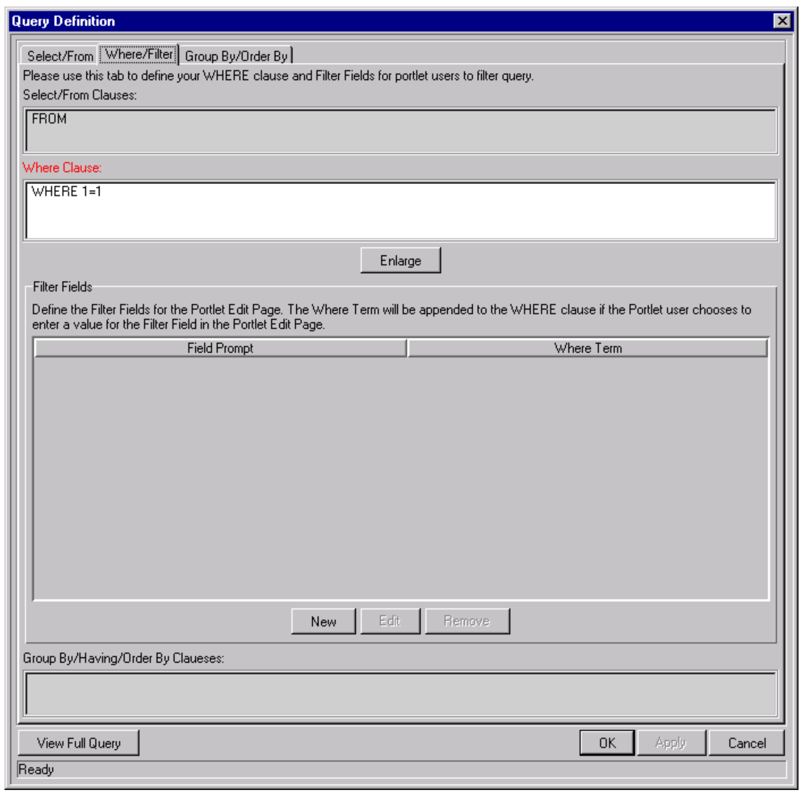
9. In the FROM CLAUSE field, enter the database table(s) or view(s) that the portlet will be drawing from. The FROM CLAUSE field is a free-form SQL text entry area.

Note

Portlets can display data from any external database accessible from the Kintana system. This can be done using the **SELECT/FROM** tab of the QUERY DEFINITION window. Include database links to external sources' tables and/or views in the **FROM CLAUSE**, following standard SQL formats.

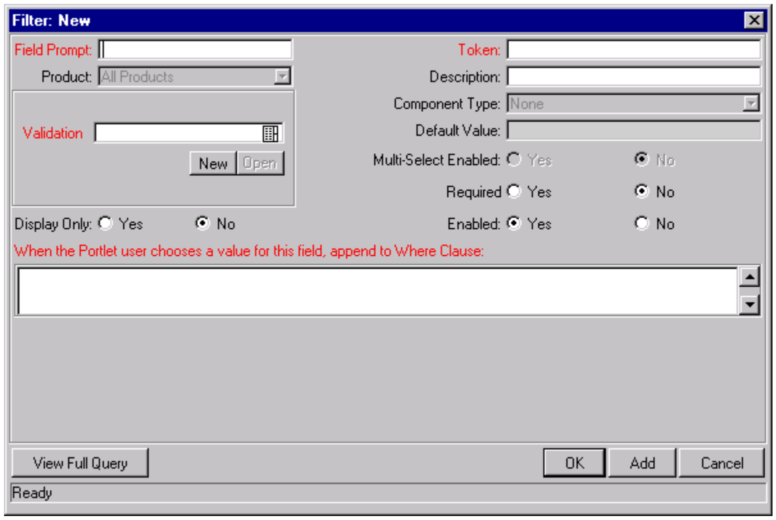
10. Click **APPLY** to save the edits in the **SELECT/FROM** tab.

11. In the QUERY DEFINITION field, click the **WHERE/FILTER** tab.



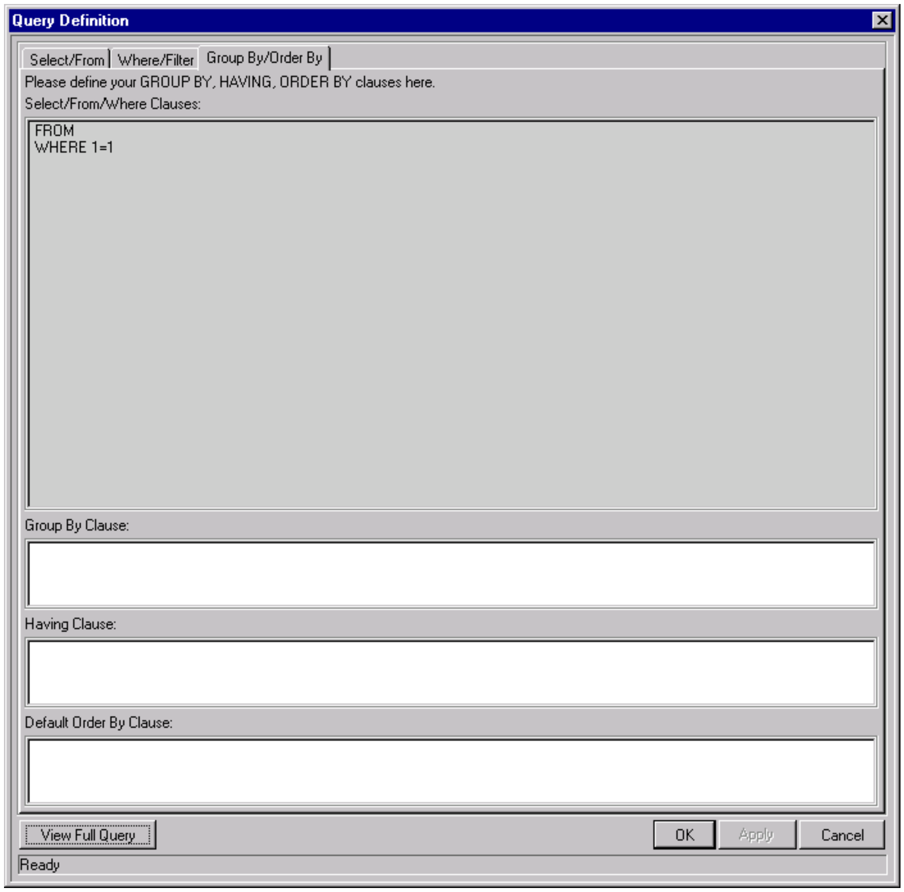
12. Define the WHERE clause of the portlet query in the WHERE CLAUSE field. The WHERE CLAUSE field is a free-form SQL entry area. To open a larger WHERE CLAUSE entry field, click **ENLARGE**.

13. Define any desired filter fields by clicking **NEW**. The FILTER: window opens.



The filter fields appear on the portlet's edit page. Each filter field appends its WHERE clause to the portlet query, but only when the filter field is being used by a Dashboard user. See *"Defining Filter Fields"* on page 25 for more detailed information on defining filter fields.

14. Click the **GROUP BY/ORDER BY** tab.



15. Enter any desired Group By terms in the GROUP BY CLAUSE field. The GROUP BY CLAUSE field is a free-form SQL entry area.

16. Enter any desired Having terms in the HAVING CLAUSE field. The HAVING CLAUSE field is a free-form SQL entry area.

17. Enter any desired Default Order By terms in the DEFAULT ORDER BY CLAUSE field. The DEFAULT ORDER BY CLAUSE field is a free-form SQL entry area.

18. View the full portlet query by clicking **VIEW FULL QUERY**.

19. Click **APPLY** to save the portlet query. Click **OK** to save the portlet query and close the QUERY DEFINITION window.

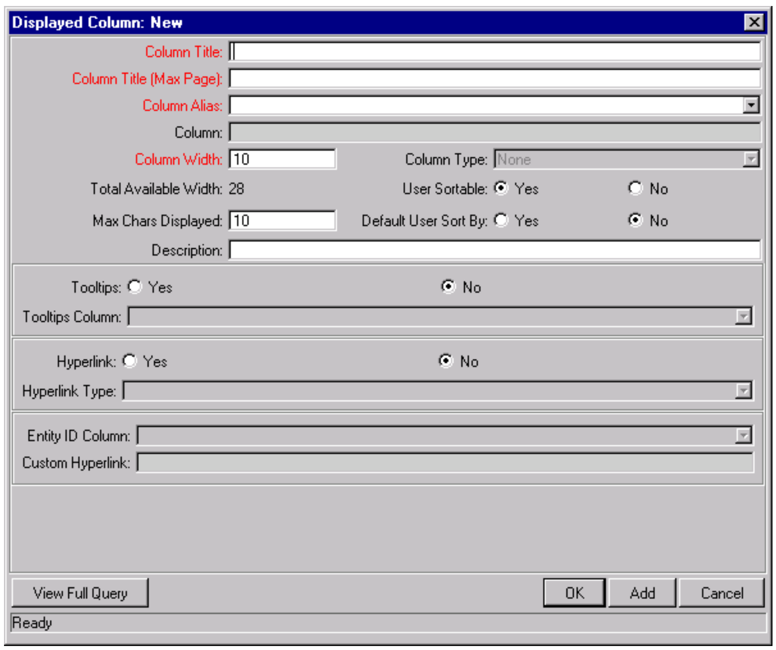
Defining the Portlet's Displayed Columns

Displayed portlet columns have many attributes to be configured. These attributes are set in the COLUMN DEFINITION window, which can be accessed in the following ways:

- When defining a column in the **Select/From** tab of the Query Definition window, select the **Add** as **Display Column** check box and click **Add**.
- In the **Displayed Columns** tab of the Portlet window, click **New**. At least one column must be defined in the Query Definition window.
- In the **Displayed Columns** tab of the **Portlet** window, select an existing column and click **Edit**.

To configure a portlet column:

1. Open the Displayed Column window using one of the methods described previously in this section.



2. Enter data into all required fields. For field definitions, see <KAppRefGuide>.

   If it is not already done, select the proper column alias defined in the **Select/From** tab of the Query Definition window from the **Column Alias** drop down list.

   The **Total Available Width** value indicates the number of characters remaining in the width of the portlet. It is updated every time **OK** or **Apply** is clicked.

3. Fill in any optional fields. For field definitions, see <KAppRefGuide>.

While any column can be **USER SORTABLE**, only one column can be set to **DEFAULT USER SORT BY**.

4. Decide whether the column will have **TOOLTIPS** enabled. If **YES**, select the column (defined in the **SELECT/FROM** tab of the QUERY DEFINITION window) that will supply the **TOOLTIPS** in the **TOOLTIPS** drop down list.

5. Decide whether the column data will be hyperlinked. If **YES**, select the type of hyperlink and entity ID column from the **HYPERLINK TYPE** and **ENTITY ID COLUMN** drop down lists.

6. Click **OK** to save the column configuration and close the COLUMN DEFINITION window.

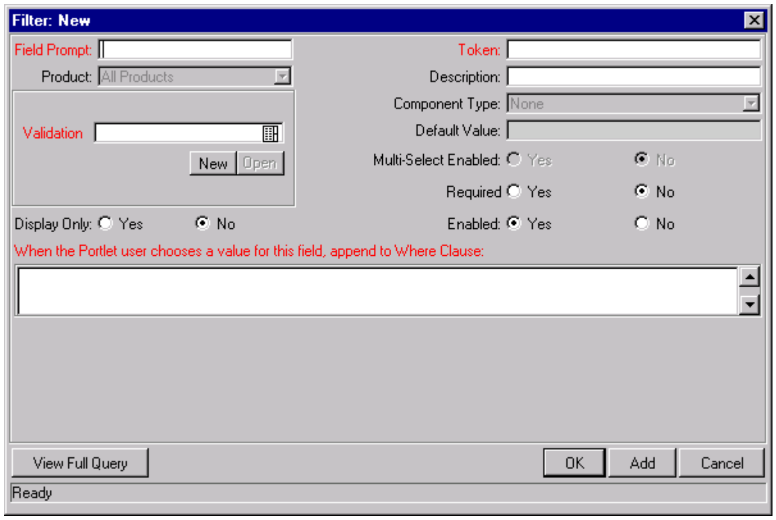
Defining Filter Fields

Each portlet can include filter fields on its edit page. Individual users select criteria from these fields to display more meaningful information in the portlet. Filter criteria are entered from a filter field and appended to the portlet query through AND clauses. Filter fields are defined from the FILTER field definition window, which can be reached in the following ways:

- In the **WHERE/FILTER** tab of the QUERY DEFINITION window, click **NEW**.
- In the **WHERE/FILTER** tab of the QUERY DEFINITION window, select an existing filter field in the table and click **EDIT**.
- In the **FILTER FIELDS** tab of the PORTLET window, click **NEW**.
- In the **FILTER FIELDS** tab of the PORTLET window, select an existing filter field in the table and click **EDIT**.

To define a filter field:

1. Open the FILTER field definition window using one of the methods previously described in this section.



2. Fill in all required fields. For field definitions, see <KAppRefGuide>.

   The WHEN THE PORTLET USER CHOOSES A VALUE FOR THIS FIELD, APPEND TO WHERE CLAUSE FIELD is a free-form SQL entry area. Each filter field will append its term to the portlet query, but only when the filter field is being used by a Dashboard user.

3. Fill in any optional fields. For field definitions, see <KAppRefGuide>.

4. Click **OK** to save the filter field configuration and close the FILTER FIELD DEFINITION window. Click **ADD** to save the filter field.

Laying Out Filter Fields

The graphical presentation of the filter fields on the portlet's edit page is configured on the PORTLET window in the **FILTER LAYOUT** tab. Modifying the layout of the filter fields can consist of the following activities:

- *Modifying the Width of a Filter Field*
- *Moving a Filter Field*
- *Switching the Positions of Filter Fields*

Modifying the Width of a Filter Field

To change the column width of a field:

1. Open the PORTLET window.

2. Click the **FILTER LAYOUT** tab.

3. Select the field.

4. From the **FIELD WIDTH** drop down list, select 1 (for narrow portlets) or 2 (for wide portlets).

5. Click **SAVE** to save the portlet and continue to modify the filter field layout. Click **OK** to save the portlet and close the PORTLET window.

Moving a Filter Field

To move a field or a set of fields:

1. Open the PORTLET window.

2. Click the **FILTER LAYOUT** tab.

3. Select the field(s). To select more than one field, press the **SHIFT** key while selecting the last field in a set. Selection is either singular or a sequential group. Only a group of adjacent fields can be selected.

4. Move the fields to the desired location in the layout builder, either by clicking the arrow buttons or using the corresponding keyboard arrow keys.

5. Click **SAVE** to save the portlet and continue to modify the filter field layout. Click **OK** to save the portlet and close the PORTLET window.

Note

A field, or a set of fields, cannot be moved to an area where other fields already exist. Those other fields must be moved out of the way first.

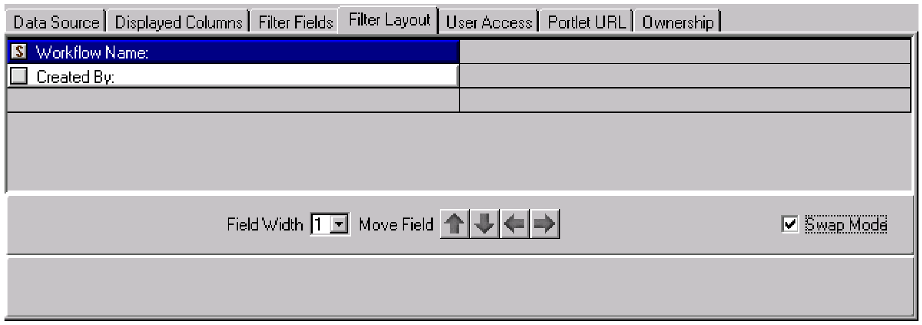
Switching the Positions of Filter Fields

To switch the positions of two filter fields:

1. Open the PORTLET window.

2. Click the **FILTER LAYOUT** tab. The FILTER LAYOUT window is returned.

3. Select the first field and select the **SWAP MODE** check box. This causes an "**S**" to appear in the check box area of the selected field.



4. Once the “**S**” appears, double-click on the field to be swapped. This causes the two fields to change positions.

   After the swap is completed, swap mode is automatically turned off. To swap the next selection of fields, repeat the above procedure.

5. Click **SAVE** to save the portlet and continue to modify the filter field layout. Click **OK** to save the portlet and close the PORTLET window. Click **CANCEL** to close the PORTLET window without saving changes.

Note

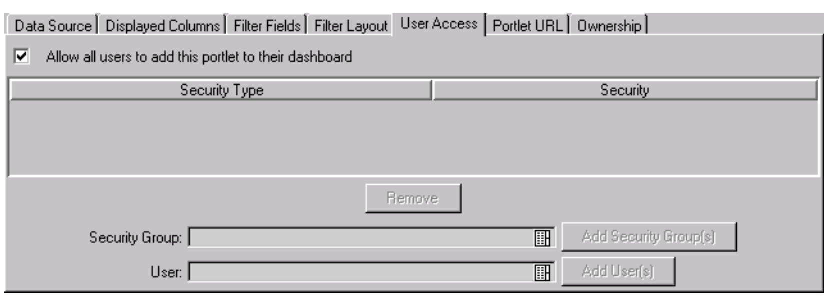
Swap Mode can also be used between a field and an empty space using the procedure defined above.

Portlet Security

User access to portlets is defined in the PORTLET window under the **USER ACCESS** tab. To define the security groups and users who can access a portlet:

1. Open the PORTLET window.

2. Click the **USER ACCESS** tab. The USER ACCESS window is displayed.



3. Decide whether the portlet will be restricted to only certain Security Groups or users.

- If no restriction is necessary, leave the '**ALLOW ALL USERS TO ADD THIS PORTLET TO THEIR DASHBOARD**' box checked. No further configuration is needed.

- If only certain Security Groups or users should use the portlet, de-select the '**ALLOW ALL USERS TO ADD THIS PORTLET TO THEIR DASHBOARD**' box. The SECURITY GROUP and USER multi-select auto-complete lists are enabled.

  i. Specify which Security Groups can use this portlet. Select SECURITY GROUP field. Click the **ADD SECURITY GROUP(S)** button.

  ii. Specify which users can use this portlet. Select the user from the USER field. Click the **ADD USER(S)** button.

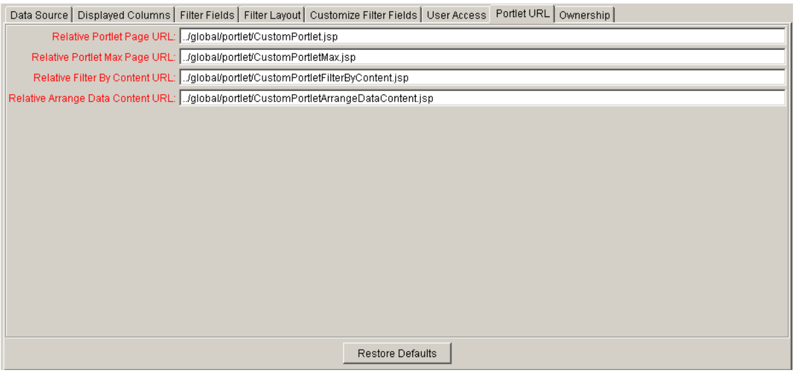
4. Click **OK** to save the security configuration and close the PORTLET window. Click **SAVE** to save the security configuration and continue to modify the portlet.

Portlet URL

Some portlets use custom JSP pages. If a custom JSP page exists for the portlet, the location of the JSP page must be specified. Specifying a JSP page is done from the PORTLET window under the **PORTLET URL** tab. The following details how to define a JSP page for a portlet:

1. Open the PORTLET window.

2. Click the **PORTLET URL** tab. The PORTLET URL window is displayed.



3. Enter the following information:

   o **RELATIVE PORTLET PAGE URL** — The JSP page that displays the portlet in the Dashboard.

- **RELATIVE PORTLET MAX PAGE URL** — The JSP page that displays the portlet in its own Maximized page.
- **RELATIVE FILTER BY CONTENT URL** — The JSP page that displays the Filter By section of the portlet’s Edit page.
- **RELATIVE ARRANGE DATA CONTENT URL** — The JSP page that displays the Arrange section of the portlet’s Edit page.

Note

Only very advanced Kintana users with extensive knowledge of JSP should create their own JSP pages for portlets. All other Kintana users will not need to use the **PORTLET URL** tab.

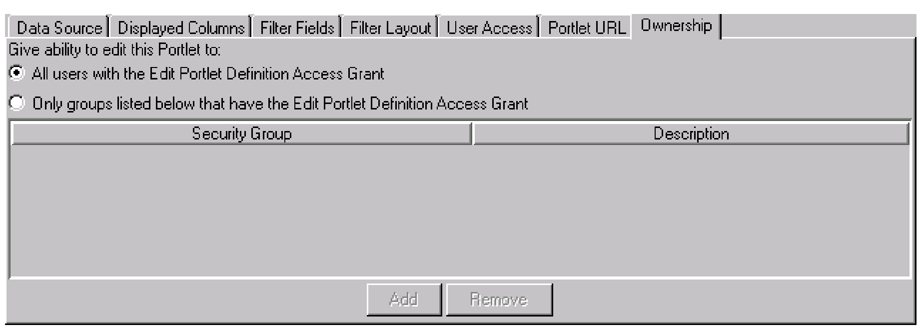
Setting Ownership for Portlets

Different groups of Kintana users have ownership and control over Kintana entities. These groups are referred to as Ownership Groups. Members of Ownership Groups are the only users who have the right to edit, delete or copy that entity.

Users can assign multiple Ownership Groups to the various entities. The Ownership Groups will have sole control over the entity, providing greater security. Ownership Groups are defined in the SECURITY GROUPS window. Security Groups become Ownership Groups when used in the Ownership configuration.

To link a portlet to an Ownership Group:

1. Open the PORTLET window.
2. Click the **OWNERSHIP** tab. The OWNERSHIP window is returned.



3. Click the **ONLY GROUPS LISTED BELOW THAT HAVE THE EDIT PORTLET DEFINITION ACCESS GRANT** radio button. This enables the **ADD** button.

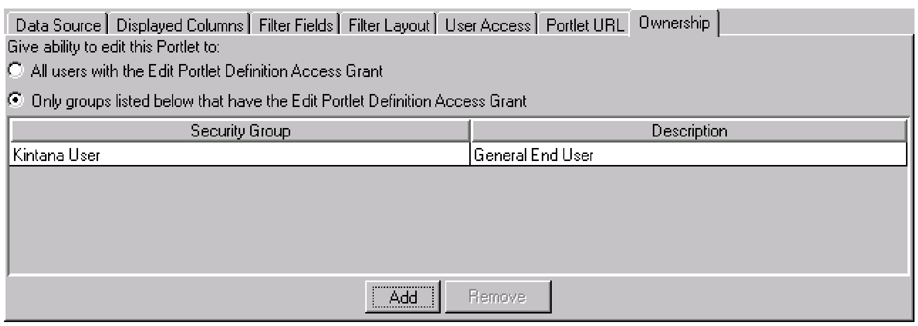
4. Click **Add**. The Add Security Group window opens.

5. In the Add Security Group window, select the icon in the **Security Group** field. The Validate autocomplete list is returned.

6. In the Validate autocomplete list, select the security groups and click OK.

7. Click **Add** to add the current Security Group and continue adding more Security Groups. Click **OK** to add the current Security Group and close the Add Security Group window.

   The selected Security Group(s) are displayed in the **Ownership** tab under the **Security Group** column.



8. Click **OK** to save the selection(s) and close the Portlet window. Click **Save** to save the selection(s) and leave the Portlet window open. Click **Cancel** to close the window without saving changes.

   Only members of the Security Groups specified in the Ownership window can edit, copy or disable a specific portlet. If a Security Group is disabled or loses the Edit Portlet Definition Access Grant, that group will no longer have access.

Note

If no Ownership Groups are associated with the entity, the entity is considered global and any user with the proper Edit Access Grant for the entity can edit, copy or disable it. Refer to the *"Kintana Security Model"* document for more information on Kintana Access Grants.

Users with the ‘Ownership Override’ access grant and can access configuration entities even if the user is not a member of one of the Ownership Groups and does not have the specific Edit Access Grant.

Requiring First-Time Personalization

It may be advantageous to require all Kintana users to personalize the portlet the first time they see it on their Dashboard. By requiring first-time personalization of a portlet, the user will see the message: **PLEASE EDIT THE DEFAULT SEARCH CRITERIA FOR THIS PORTLET** when adding the portlet to a Dashboard. To require users to personalize the portlet before using it:

1. Open the PORTLET WORKBENCH.
2. Locate and open the portlet to edit.
3. Click the **FILTER FIELDS** tab.
4. Set the 'REQUIRE FIRST TIME PERSONALIZATION BY USER' radio button to **YES**.
5. Click **SAVE** to save the personalization setting and continue to modify the portlet. Click **OK** to save the personalization setting and close the PORTLET window.

Note

Only members of designated Ownership Groups with the **EDIT PORTLET DEFINITION ACCESS GRANT** can change the personalization setting. See *"Setting Ownership for Portlets"* on page 30 for more information about Ownership.

Verifying the New Portlet

Once the new portlet is complete, verify the portlet to make sure the query's tokens and column interactions in the **DATA SOURCE** tab are correct. Verification of a portlet is performed from the PORTLET WORKBENCH window. To verify a portlet:

1. Locate and open the portlet to verify using the PORTLET WORKBENCH.
2. Click **VERIFY** to verify the query's tokens and column interaction in the **DATA SOURCE** tab. Once the portlet's query tokens and column interactions are verified, the portlet is ready to be added to the Kintana Dashboard. See *"Enabling Portlet Use"* on page 32 for more information.

Enabling Portlet Use

Once a custom portlet is built and verified, the portlet must be enabled before it can be accessed through the Kintana Dashboard. In addition, a custom portlet might require a new portlet category definition and changes to the portlet's access permissions. The following lists the considerations and steps required to add a portlet to the Dashboard:

- *"Enabling a Portlet"* on page 33
- *"Defining Portlet Categories"* on page 33
- *"Setting Portlet Access"* on page 36

Enabling a Portlet

Once a portlet's definition is complete, it must be enabled for use by Dashboard users. Enabling a portlet is done in the PORTLET window. To enable a portlet for use:

1. In the Kintana Workbench, open the PORTLET window.
2. In the portlet general information region, set the **ENABLED** radio button to **YES**.
3. Click **SAVE** to save and continue to modify the portlet. Click **OK** to save and close the PORTLET window.

Defining Portlet Categories

A user can define the categories into which portlets are placed. These categories appear on the ADD A PORTLET page (see *Figure 3-2*). Selecting a portlet category limits the options displayed in the ADD A PORTLET drop down list. This functionality helps end users select the types of portlets that are most closely related to their business activities.

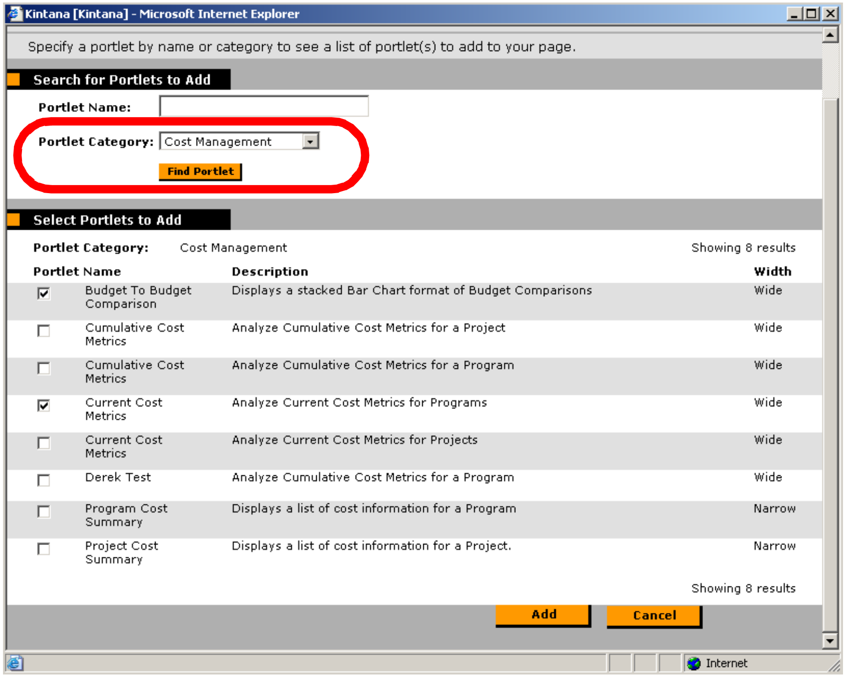
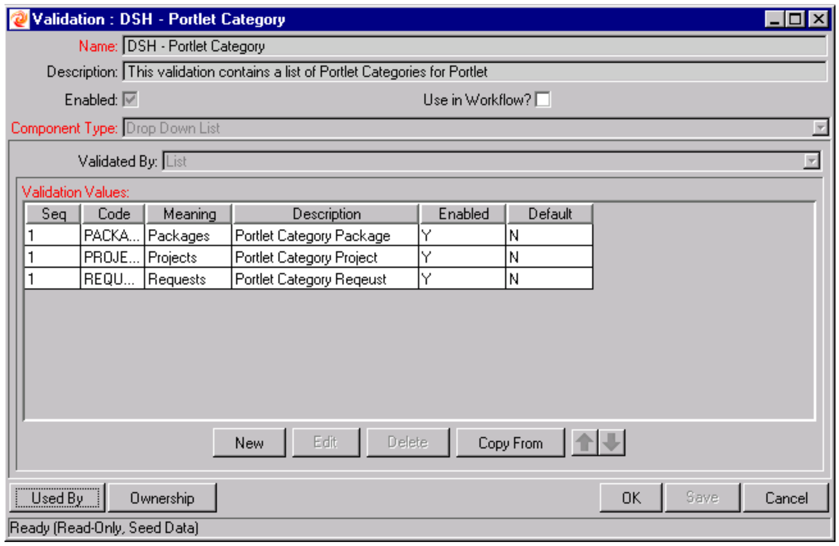


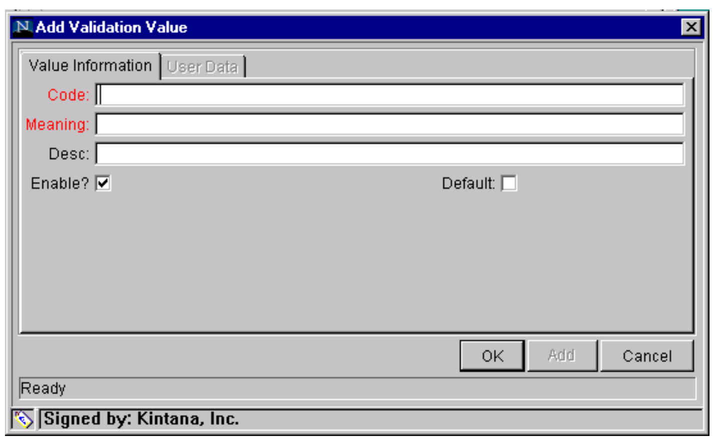
Figure 3-2 Example: Portlet Category Drop Down List

To define the portlet categories:

1. Logon to the Kintana Workbench.
2. In the **Configuration** screen group, click the **Validations** icon. The Validation Workbench opens.
3. In the Validation Name field, enter **DSH - Portlet Category**.
4. Click the **List** button. The **DSH - Portlet Category Validation** is listed in the **Results** tab.
5. Select the **Validation** and click the **Open** button. The Validation window opens, displaying all of the Portlet Categories currently configured.

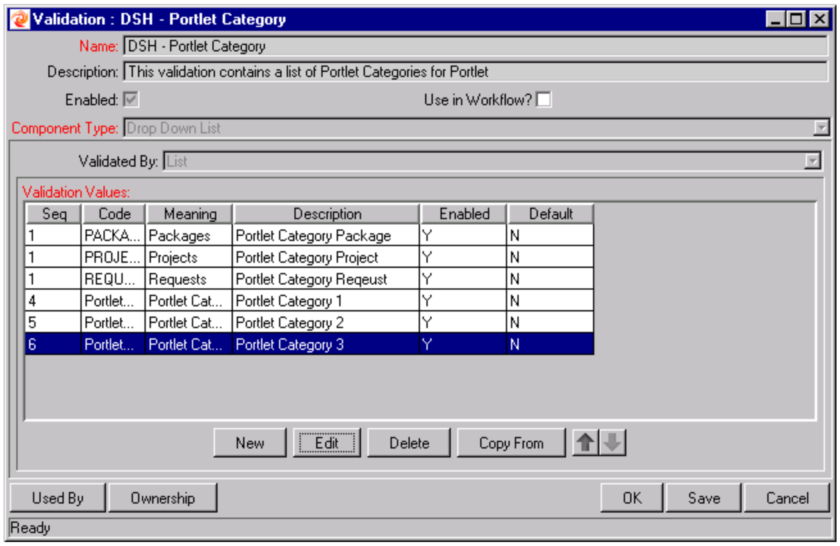


6. Click **New** to add a new portlet category. The Add Validation Value window opens.



7. Enter values into the Code and Meaning fields. The Code is a value that will be used for internal Kintana processing. The Meaning is the name of the **Portlet Category** appearing in the drop down list.

8. Click the **OK** button to close the Add Validation Value window or the **Add** button to enter another portlet category. The new **Validation** values will appear in the Validation window.



Setting Portlet Access

It may be advantageous to control which users can access certain portlets, depending on their business role in the organization. Access to portlets can be configured so that only certain users or Security Groups can use them. See *"Portlet Security"* on page 28 for more detailed information on setting up portlet user access or the *"Kintana Security Model"* document.

Example

There may be company, financial, and/or project data that a company director may have access to that would be inappropriate for a developer to see.

Note

If the global permission option was selected in the **Ownership** tab, all users with the **Edit Portlet Definition Access Grant** can configure portlet security. If the global permission option was not selected, only members of designated Ownership Groups with the **Edit Portlet Definition Access Grant** can configure portlet security. See *"Setting Ownership for Portlets"* on page 30 for more information about Ownership.

Portlet Maintenance

This section details how to edit and delete portlets, generate administration reports concerning portlets, and migrating portlets from one Kintana instance to another.

- *"Editing a Portlet"* on page 37

- *“Deleting a Custom Portlet”* on page 38
- *“Portlet Detail Report”* on page 39
- *“Portlet Migrator”* on page 40

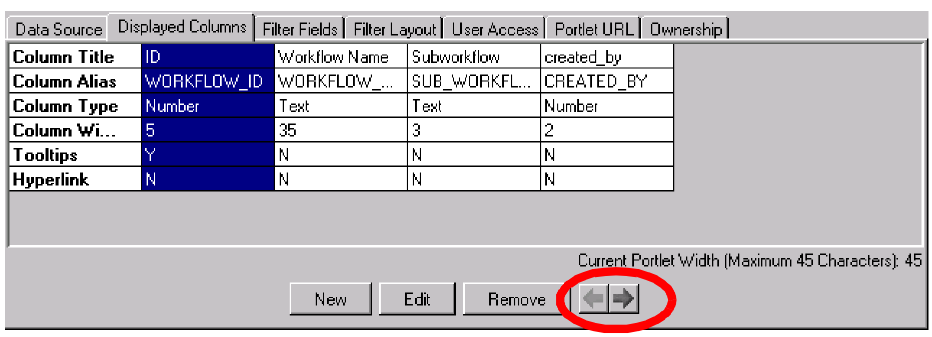
Editing a Portlet

Custom portlets can be edited using the same processes by which they were created. The following sections contain more detailed information about editing existing portlets:

- *“Editing Portlet Layout”* on page 37
- *“Propagating Change to Existing Portlets”* on page 38

Editing Portlet Layout

The graphical presentation of portlet columns can be modified in the DISPLAYED COLUMNS window.



To change the order of columns in the portlet:

1. In the Kintana Workbench, open the PORTLET window.
2. Click the **DISPLAYED COLUMNS** tab.
3. Select the column to move.
4. Click the direction arrow buttons (or) to move the column to its desired position.
5. Click the **SAVE** button to save the portlet column layout and continue to modify the portlet. Click the **OK** button to save the portlet column layout and close the PORTLET window.

Note

Only members of designated Ownership Groups with the **Edit Portlet Definition Access Grant** can edit the portlet column layout. See *"Setting Ownership for Portlets"* on page 30 for more information about Ownership.

Propagating Change to Existing Portlets

Changes to any aspect of a portlet take effect immediately upon save. Portlets that are not enabled cannot be placed on the Dashboard, so users remain unaffected. Portlets that are in use will exhibit the changes once the user refreshes the page the portlet is contained in.

Note

If a portlet's definition is altered such that a user no longer has access to that portlet, it will be deleted from the user's Dashboard. If the portlet's definition is altered again to re-include the user, the portlet will have to be added and personalized by the user from scratch.

Deleting a Custom Portlet

To delete a portlet:

1. Open the Kintana Workbench.
2. In the **Dashboard** screen group, click the **Portlets** icon. The Portlet Workbench opens.
3. Enter search criteria to locate the portlet in the **Query** tab.
4. Click the **List** button. The **Results** tab displays the portlets matching the search.
5. Select the portlet to be removed and click the **Delete** button.

Note

Portlets that are currently being used by Kintana users cannot be deleted. Users must remove the portlet from their Dashboards to allow it to be deleted from the system.

If the global permission option was selected in the **Ownership** tab, all users with the **Edit Portlet Definition Access Grant** can delete the portlet. If the global permission option was not selected, only members of designated Ownership Groups with the **Edit Portlet Definition Access Grant** can delete the portlet. See *"Setting Ownership for Portlets"* on page 30 for more information about Ownership.

Portlet Detail Report

The PORTLET DETAIL REPORT is used to return the details of a portlet or range of portlets. It lists the portlet's columns, as well as the SQL query used by the portlet to retrieve data from the system. The portlet's filter fields and security configuration can also be listed.

Note

The portlets displayed by the report will be restricted. The user running the report will only see information on the portlets for which that user has access, based on settings in the portlet **USER ACCESS** tab. If the user can access the portlet, that portlet will be included in the report. Otherwise, information about the portlet will not be included in the report.

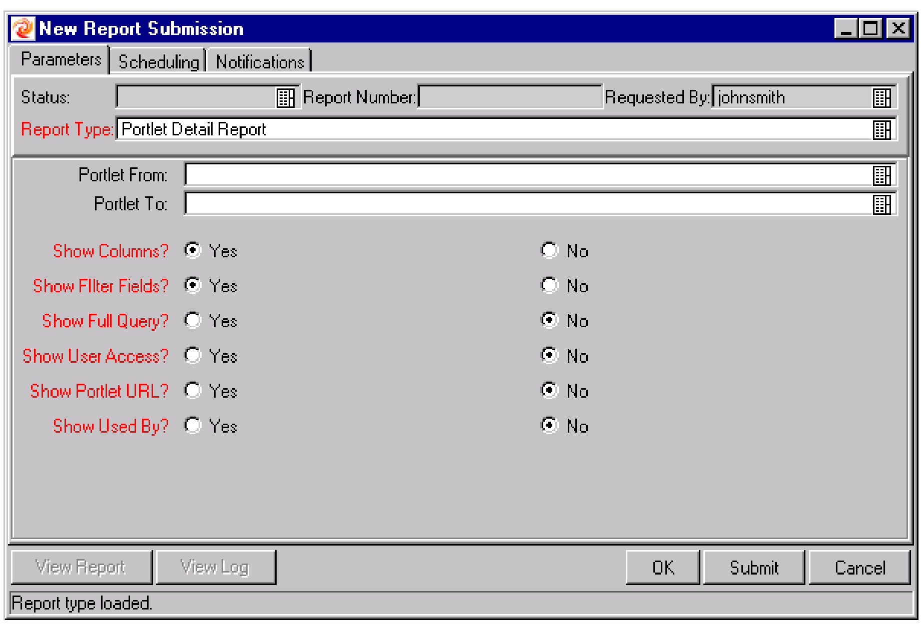
To submit a PORTLET DETAIL REPORT:

1. Logon to the Kintana Workbench.

2. In the DELIVER, CREATE or DRIVE screen group, click the **REPORTS** icon. The REPORT SUBMISSION WORKBENCH window opens.

3. Click the **NEW REPORT** button. The NEW REPORT SUBMISSION window opens.

4. In the REPORT TYPE field, select the **PORTLET DETAIL REPORT** entry. The NEW REPORT SUBMISSION window is populated with the **PORTLET DETAILED REPORT** data.



5. Enter data into all required fields. For field definitions, see *Table 3-1*.

6. Fill in any optional fields. For field definitions, see *Table 3-1*.
7. Click the **SUBMIT** button. The **PORTLET DETAIL REPORT** is started. In the STATUS: field, the status will be **RUNNING**.
8. When the STATUS: field is **COMPLETED**, the **PORTLET DETAIL REPORT** is complete.
9. Click the **VIEW REPORT** button. The PORTLET DETAIL REPORT is displayed.

Table 3-1. Parameters - Portlet Detail Report

Field / Button	Description
Portlet From	Only select portlets that are alphabetically equal to or greater than the value in this field.
Portlet To	Only select portlets that are alphabetically equal to or less than the value in this field.
Show Columns	Determines whether to show portlet column information.
Show Filter Fields	Determines whether to show portlet filter field information.
Show Full Query	Determines whether to show the full portlet query.
Show User Access	Determines whether to show portlet Security.
Show Portlet URL	Determines whether to show portlet URLs.
Show Used By	Determines whether to show which users are using this portlet.

Portlet Migrator

Kintana Migrators are used to move Kintana configuration data such as Validations, Workflows, and Request Types between instances (installations) of Kintana. These Migrators are provided as Kintana Deliver Object Types. For more information on Migrators, see the *"Kintana Migrators"* document.

Chapter 4
Default Dashboard

Users with the EDIT DEFAULT USER HOMEPAGE access grant can configure a Default Dashboard page that all Kintana users will see when they log in for the first time. This saves time and allows first-time users to more quickly and easily integrate the Kintana Dashboard into their business processes. The Default Dashboard page is configured using the Kintana Dashboard interface. The following sections contain more detailed information on working with the Default Dashboard page:

- *Portlet Organization*
- *Configuring the Default Dashboard Page*

Portlet Organization

The EDIT DEFAULT USER HOMEPAGE page is used to add, move or remove portlets from the Default Dashboard page. This page is also used to arrange the portlets' locations on their pages. *Figure 4-1* provides a graphical overview of the EDIT DEFAULT USER HOMEPAGE page. For detailed instructions on using the

EDIT DEFAULT USER HOMEPAGE page to configure the Default Dashboard page for all Kintana users, see *"Configuring the Default Dashboard Page"* on page 42.

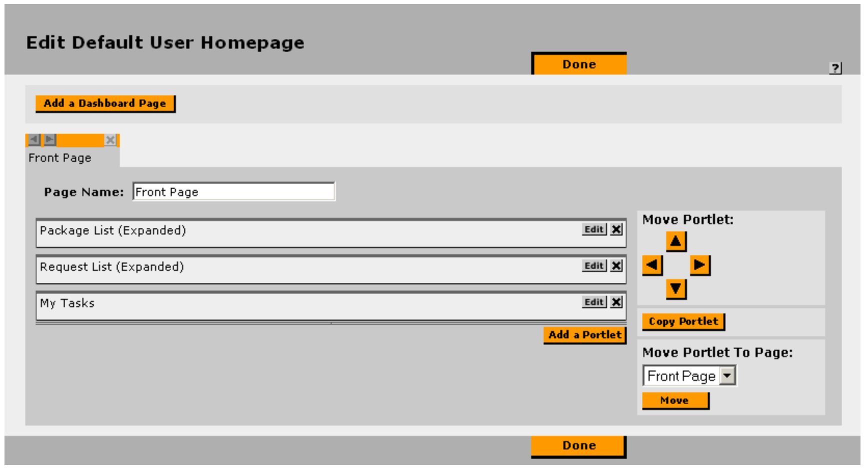


Figure 4-1 Edit Default User Homepage Overview

Configuring the Default Dashboard Page

The EDIT DEFAULT USER HOMEPAGE access grant is required to configure the Default Dashboard page.

Note

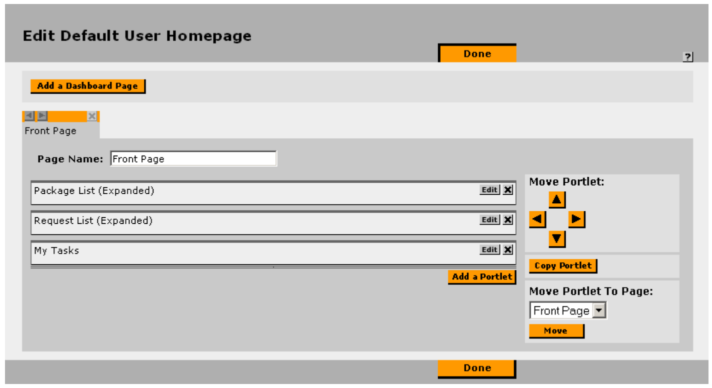
Since each user might have a different Security configuration, different portlets will appear on the Default Dashboard page of each user.

For example, the Default Dashboard page contains portlets A, B, C, D, and E. User "jsmith" has access only to portlets A,C, and E. "jsmith" will only see portlets A, C, and E.

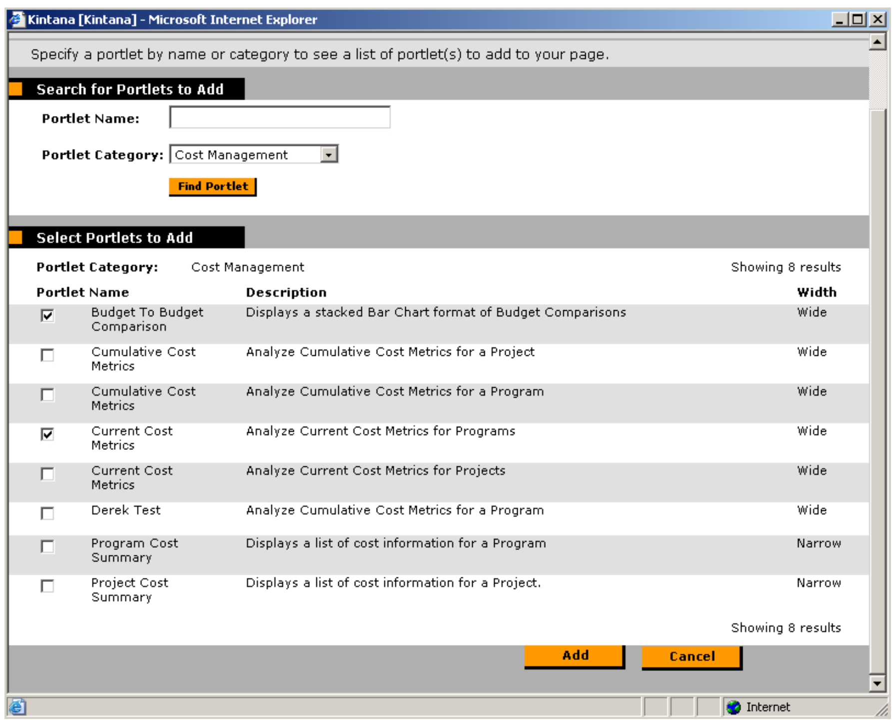
To configure the Default Dashboard page:

1. Logon to Kintana.

2. Select **ADMINISTRATION > DEFAULT DASHBOARD** > **CONFIGURE DEFAULT DASHBOARD** from the menu.



3. On the EDIT DEFAULT page, click the **ADD A PORTLET** button. The ADD A PORTLET window is displayed.



4. Add the portlet. The following lists the two ways to add a portlet:

   a. In the PORTLET NAME field, enter some or all of the portlet's name.

   b. Click the **FIND PORTLET** button. A list of portlets is returned matching the search criteria.

c. Select the portlet to be added to the Dashboard.

d. Click the **Add** button. The portlet is added to the Dashboard page.

or

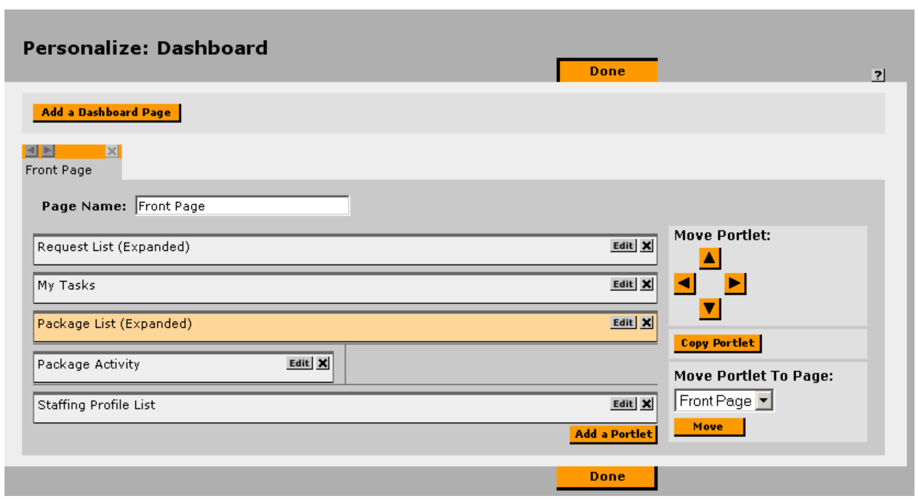
a. From the Portlet Category drop-down list, select a category. The drop-down list identifies the available groupings for portlets. (For example, **Cost Management**.)

b. Click the **Find Portlet** button. A list is returned of portlets associated with the chosen portlet category.

c. Select the portlet or portlets to be added to the Dashboard page.

d. Click the **Add** button. The portlet is added to the Dashboard page.

5. Move the portlet to the area where it should appear on the Kintana Dashboard. Select (highlight) the portlet to be moved and click the directional arrows to move the portlet in that direction.



Additionally, portlets can be moved to other Dashboard pages using the **Move Portlet to Page:** drop down list and **Move** button.

6. Personalize the portlet. Highlight the portlet and click the **Edit** button. The portlet edit page is returned.

7. Once the portlet is positioned and personalized, click the **DONE** button.The new portlet now appears on the Dashboard page in a position corresponding to the selected layout area.

Note

Because each portlet can be configured to provide a very specific view into a business' data, the same portlet can be added to the Kintana Dashboard multiple times with different configurations.

Viewing the Default Dashboard Page

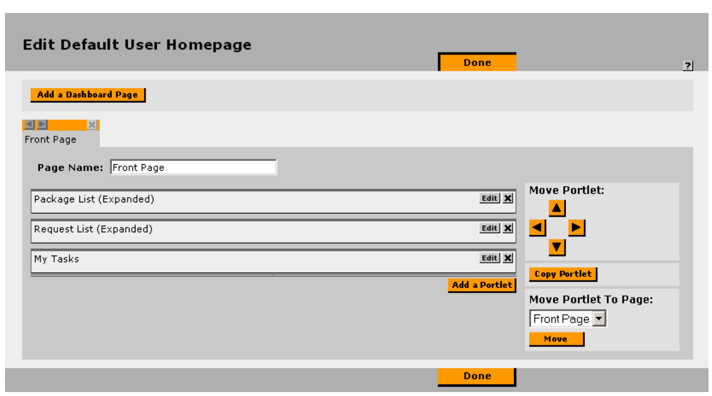
To view the Default Dashboard page at any time:

1. Logon to Kintana Dashboard page.
2. On the menu, select the **ADMINISTRATION** menu title. The **ADMINISTRATION** menu items appear.
3. Under the **DEFAULT DASHBOARD** menu title, select **VIEW DEFAULT DASHBOARD.** The DEFAULT DASHBOARD page is returned.

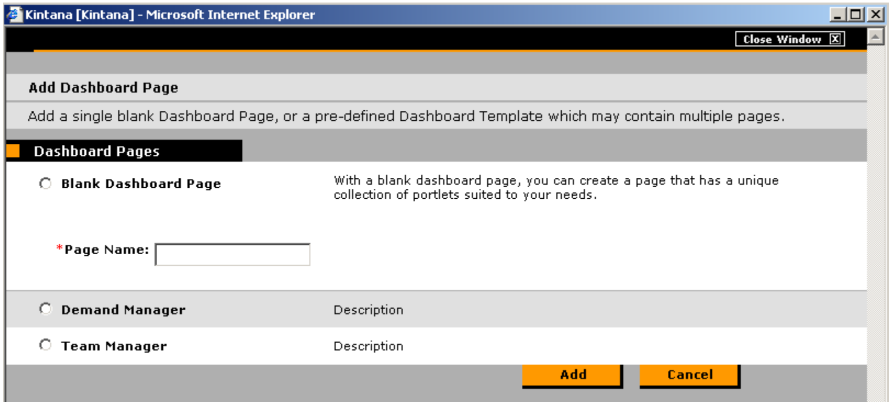
Adding Multiple Pages to the Default Dashboard

The EDIT DEFAULT USER HOMEPAGE access grant is required to add multiple pages to the DEFAULT DASHBOARD page. To add a page to the DEFAULT DASHBOARD page:

1. Logon to KINTANA DASHBOARD page.
2. Select **ADMINISTRATION > DEFAULT DASHBOARD** > **CONFIGURE DEFAULT DASHBOARD** from the menu.



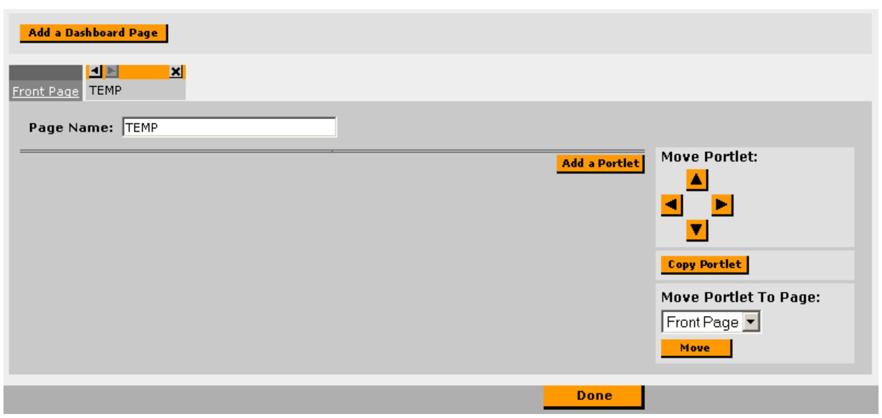
3. On the EDIT DEFAULT page, click the **ADD DASHBOARD** button. The ADD A DASHBOARD PAGE is displayed.



4. On the ADD DASHBOARD PAGE window, select a radio button for the type of Dashboard page to add. The number and definition of available Dashboard pages depends on the specific Kintana site.

5. In the PAGE NAME field, enter the name for the new Dashboard page.

6. Click the **ADD** button. The new Dashboard page is now added to the Kintana Dashboard.



Appendix A System Portlets

System portlets are configurable, role-based visual displays providing relevant summary information of the user's business data. Each user can select which portlets they want to display on their Dashboard page. Users can then personalize those portlets to display only information relevant to their specific Cost, Demand, Package, Program, Project, Request, Resource or Time. The following lists the categories of system portlets:

- Cost Management portlets are listed and described in *Table*
- Demand Manager portlets are listed and described in *Table A-1*
- Package portlets are listed and described in *Table A-2*
- Program portlets are listed and described in *Table A-3*.
- Project portlets are listed and described in *Table A-4*
- Project Overview portlets are listed and described in *Table A-5*
- Request portlets are listed and described in *Table A-6*
- Resource Management portlets are listed and described in *Table A-7*
- Time Management portlets are listed and described in *Table A-8*

Note

Not all users can view and access all portlets. Portlet access depends on:

- The appropriate Kintana licenses.
- The appropriate portlet access (Security Group setting).

Kintana Cost Management Portlets	Description
Budget To Budget Comparison	Displays a Budget to Budget Comparison bar chart. Allows a comparison of one or more Allocation Budgets to one or more Allocated Budgets. This allows users to compare one budgeted allocation to another.
Cumulative Cost Metrics (Program)	Displays a trend chart analyzing the cumulative cost metrics for a Program. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Cumulative Cost Metrics (Project)	Displays a trend chart analyzing the cumulative cost metrics for a Project. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Current Cost Metrics (Program)	Displays an analysis of the Current Cost Metrics for a Program. Displays a bubble chart analyzing the current cost metrics for a Program. The bubble chart can be used to show current cost status of a project or current cost status of a program.
Current Cost Metrics (Project)	Displays an analysis of the Current Cost Metrics for a Project. Displays a bubble chart analyzing the current cost metrics for a Project. The bubble chart can be used to show current cost status of a project or current cost status of a program.
Project Cost Summary	Displays a list of cost information for a Project.

Table A-1. Kintana Demand Management Portlets

Kintana Demand Management Portlets	Description
Assignment Queue	Provides a personalized view into the Demand that has not been assigned to a resource. This portlet assigns a Kintana user as a resource to a Request.
Consolidated Demand	Provides a graphical overview of the Demand placed on an organization.
Demand by Category	Provides a quick view into different areas of Demand. This portlet provides a quick, graphical Demand summary and can be grouped by DEPARTMENT, DEMAND TYPE, PRIORITY, etc.
Demand List	Provides a personalized list of the demand placed on an organization or individual. This portlet can be personalized to display demand filtered based on specified criteria (DEMAND TYPE, PRIORITY, DEMAND DISPOSITION, etc.)
SLA Exception Roll Up	Lists the open Requests that have triggered SLA exceptions. The Service Level Agreements are configured using Request Type rules. The portlet displays the active SLAs related to a Demand, highlighting the violations in red.

Table A-2. Kintana Packages Portlets

Kintana Packages Portlets	Description
My Packages	Displays all Packages created by or assigned to the current user. Users can drill down on any Package to view its details, such as the Workflow status and Package Lines. This portlet provides a critical view into the most pressing Packages.
Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Users can drill down on any Object Type or Environment to view the included Packages.

Kintana Packages Portlets	Description
Package List	Displays general information about Kintana Packages, such as their description and status. This portlet can be personalized to display information based on various Package related criteria. This enables users to display only the Packages that are relevant to their personal activities.
Package List (Expanded)	Displays general information about Kintana Packages, such as their description and status. This portlet can be filtered for the same Package criteria as the Package List portlet, but displays more detailed Package information on the Dashboard.
Package Reference	Displays the References that are attached to the Package based on filters such as Reference Types, Relationship, and the time period when they were added.
Package Summary Bar Chart	Displays information in the form of a bar chart about groups of Kintana Packages, including priority, 'ASSIGNED TO' user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages that comprise the group's total number.
Package Summary Pie Chart	Displays information in the form of a pie chart about groups of Kintana Packages, including priority, 'ASSIGNED TO' user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages that comprise the group's total number.
Pending Deployment	Displays general information about Kintana Packages which have not been deployed. This portlet provides visibility into scheduled or required Package migration.

Table A-3. Kintana Program Portlets

Kintana Program Portlets	Description
Program Cost Summary	Displays an overview of the Project Cost Health. Cost overview summarizes labor, non-labor and total expenses set against baseline, planned and actual costs. The EARNED VALUE SUMMARY includes the PLANNED VALUE, SCHED VARIANCE, EARNED VALUE, COST VARIANCE, ACTUAL COST, SPI AND CPI.
Program Issue List	Displays a list of program issues. This portlet can be personalized to display program issues based on project, escalation level, priority, status or other Program related criteria. This enables users to display only the Programs that are relevant to their personal activities.
Program List	Displays general information about Programs, such as program priority, program state and issues. This portlet can be personalized to display information based on PROGRAM NAME or other Project related criteria. This enables users to focus on and display only the most relevant Program data.
Program Project List	Displays the Project List of a Program. The portlet is configured with default parameters to show all project items for the program so that the portlet can be used without personalizing the portlet. The project items are sorted by the project hierarchy and optionally, by name, resource, state, scheduled finish, and project hierarchy.
Program Resource Request List	Displays a list of program resource requests. This portlet can be personalized to display program resource requests based on, PRIORITY, STATUS, ASSIGNED TO AND ASSIGNED TO GROUP. This enables users to display only the Resource requests that are relevant to their personal activities.
Program Risk List	Displays a list of program risks. This portlet can be personalized to display program risks based on project, escalation level, priority, probability, impact level or other Program related criteria. This enables users to display only the Program Risks that are relevant to their personal activities.

Kintana Program Portlets	Description
Program Scope Change List	Displays the List of a Program’s Scope Changes. The sequence, Tasks and project name are displayed, as well as the values for the project and baseline pair selected of the four schedule fields. The four fields are: SCHEDULED START, SCHEDULED FINISH, SCHEDULED DURATION and SCHEDULED EFFORT.

Table A-4. Kintana Projects Portlets

Kintana Projects Portlets	Description
My Tasks	Displays all Project Tasks currently assigned to the user that have a scheduled finish date two weeks from the current date.This portlet provides a critical view into the most pressing Tasks and nearing deadlines.
Project Budget and Staffing Profile vs. Actuals	Displays a summary of project performance relative to budgetary constraints. Values are for the entire project to date. 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. Budgeted values for cost and hours are drawn from a budget, not from a project baseline. Actuals for cost are gathered from the budget. Actuals for hours are aggregated from Tasks assignments and Tasks actuals on the project linked to the budget. Percent complete is similarly drawn from the project actuals.
Project Gantt	Displays a Gantt chart for all Projects assigned to resources. The default values show Projects scheduled for the next two weeks.
Project List	Displays general information about Kintana Projects, such as how close they are to completion and their scheduled finish date. This portlet can be personalized to display information based on Project Name or other Project related criteria. This enables users to focus on and display only the most relevant Project data.

Kintana Projects Portlets	Description
Project List (Expanded)	Displays general information about Kintana Projects, such as how close they are to completion and their scheduled start and finish date. This portlet can be filtered for the same Project criteria as the PROJECT LIST portlet, but displays more detailed information on the Dashboard.
Project Summary Pie Chart	Displays a pie chart that rolls up a group of projects and displays them grouped by their summary condition. Users have the option to either select a set of specific projects and subprojects, or filter by DEPARTMENT and/or PROJECT MANAGER fields.
Resource Gantt	Displays a Gantt chart for all work items assigned to resources. Work items are differentiated by color, with Tasks remaining the same color as in the project Gantt chart and requests being a different color. The default values show Tasks and requests scheduled for the next two weeks. The work items are labeled by having the resource displayed to the right of the work item. This is necessary if there are multiple resources or a resource group specified.

Table A-5. Kintana Project Overview Portlets

Kintana Project Overview Portlets	Description
Project Cost Summary	Displays a list of cost information for a Project if the Project has Cost Management setting enabled. This portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Kintana Drive Workbench. The portlet is configured with default parameters to show all exceptions for the project so that the portlet can be used without personalizing the portlet.

Kintana Project Overview Portlets	Description
Project Milestones	Displays a list of milestones within a project. The portlet is configured with default parameters to show all milestones for the project so that the portlet can be used without personalizing the portlet.
Project Overview Gantt	Displays a Gantt chart in the PROJECT OVERVIEW page.
Project References	Displays the References that are attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The portlet is configured with default parameters to show all References for the project so that the portlet can be used without personalizing the portlet.
Project Related Actions	Displays links to related Assignments and Staffing Profiles.
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-6. Kintana Requests Portlet

Kintana Requests Portlets	Description
My Requests	Displays all Requests created by or assigned to the current user. This portlet provides a critical view into the most pressing Requests and nearing deadlines.
Open Requests by Priority	Displays a bar chart of the number of Requests currently open, grouped by priority. This portlet provides a graphical representation to help the user visualize and group a business' open issues.

Kintana Requests Portlets	Description
Request Activity	Displays general activity information such as the number of Requests opened and closed during the last two weeks, and the number of open Requests. This portlet provides visibility into high traffic Request Types as well as the groups or users assigned to address them.
Request List	Displays general information about Requests, such as their description and status. This portlet can be personalized to display information based on specific Request numbers or other Request related criteria. This enables users to display only the Requests that are relevant to their personal activities.
Request List (Expanded)	Displays general information about Kintana Requests, such as their description and status. This portlet can be filtered for the same Request criteria as the REQUEST LIST portlet, but displays more detailed REQUEST INFORMATION.
Request References	Displays the References that are attached to the Request based on filters such as Reference Types, Relationship, and the time period when they were added.
Request Summary	Displays information about groups of Kintana Requests, including priority, type, status and the total number of Requests for each category. Users can drill down on any group of Requests and individual Requests of the group’s total number.
Request Summary Bar Chart	Displays a bar chart that allows users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests that bar represents.
Request Summary Pie Chart	Displays as a pie chart information that allows users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests that bar represents.

Table A-7. Kintana Resource Management Portlets

Kintana Resource Management Portlets	Description
Analyze Assignment Load	Compares capacity (resource calendars X resource workload capacity) to assignments (requests, Tasks, and staffing profiles marked “treat as assignments.” It is used to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Analyzes the resource pools. This portlet compares capacity (active resource pools) to load (lines on active staffing profiles that draw from these resource pools). The portlet is used to assess planned load on resource pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a Project to the staffing profile. This portlet compares capacity (as the set of active staffing profiles for a project) to assignments within the Project. The portlet is used either by the project manager or by resource managers in charge of planning staffing profiles to monitor compliance of the project plan and actuals to organizationally agreed staffing levels for the Project.
Current Resource Load by Organization	Displays the current resource load by Organization. Organization unit or skill name is a link to the related detail page. Note that to support breakdowns it is desirable to sort the list by organization hierarchy structure.
Current Resource Load By Skill	Displays the current resource load by skills. This portlet displays a snapshot of current load on a set of resources, broken down by the skill booked on the work item. Note that when skill is not specified during the booking process, it will default to the resource’s primary skill.
Resource Assignment	Displays a list of assigned resources and their related assignments and statues including: Open Tasks, Task Effort, Open Reqs and Open Pkgs.
Resource Pool List	Displays a list of resource pools. Listings include following columns: Resource Pool, Resource Pool is for, Status, Active, Start and Finish. Columns are configurable.

Kintana Resource Management Portlets	Description
Staffing Profile List	Displays staffing profiles. This portlet allows flexible filtering so that the desired set of staffing profiles can be drawn out and presented. Filters include: Specific staffing profile name(s), department, workload type, status (multi-select), start date after, finish date before, and total hours above.

Table A-8. Kintana Time Management Portlets

Kintana Time Management Portlets	Description
TMG - Actuals for Direct Reports	Displays the total time entered by all the direct reports for a specific manager or set of managers.
TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.
TMG - My Work Items	Displays all Work Items created by or assigned to the current user. This portlet provides a critical view into the most pressing Work Items and nearing deadlines.
TMG - Resource Group Total by Work Item	Displays a snapshot of current load on a set of teams. Teams are organization units. By selecting both a particular organization unit and also the organization units beneath this unit, it is possible to display a departmental summary and team breakdown. This portlet is intended to provide dashboard-level summary of upcoming load. The intended audience is PMO staff or middle managers (responsible for coordinating several teams).
TMG - Resource Group Totals	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, letting the user see the level of activity (by time) in the current and previous period for these groups.
TMG - Resource Totals	Displays the time charged by a set of resources, letting the user see the level of activity (by time) in the current and previous period for these users.

Kintana Time Management Portlets	Description
TMG - Total Hrs by Work Item	Displays detail information on the time allocated to and the time charged for specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.
TMG - Work Allocation Details	Displays summary information on the defined work allocations. It is especially helpful to see which allocations are close to being used up or actually are over budget.
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.

Appendix B Example: Creating a Portlet

The following example demonstrates how to create a **REQUEST LIST** portlet. This example portlet shows all of the ‘Internal IS Request’ type requests assigned to or created by the current portlet user. The main topics in this appendix are:

Before Building a Portlet

Before building a portlet, the user needs to know what information to display and how to display the information. The following list provides some guidelines to help determine what information is required and how best to display the information:

- What type of information needs to be captured in this portlet? For this example, we would like to display the Request Number, Request Type, Description, Created By User, Assigned User, Priority, Progress (which is a custom field on the Request type), and Current Condition (which is an item of Request User Data).
- What additional requirements are there? Are any visual indicators needed (hyperlinks, Tooltips)? For example, should the Request Numbers be hyperlinked, so users can click on the links to go to Request Detail pages directly. Since the Progress field in this example (a custom field) has a percentage as data, we would like to display the column as progress bars for better visual representation. For Created By Users and Assigned Users, we would like to see more information as Tooltips when the user mouses over the usernames. In this case, the Tooltips should include the user’s full

name and email address. The field Current Condition (the Request User Data) has values of Red, Yellow or Green, so we would like to display them as colorful icons.

- What are the database columns for the information to display, and from which tables? This information bears most directly on the SQL query that will serve as the portlet's "back end," retrieving and displaying data. What is the criteria necessary to link the database tables.
- What possible filter fields would end users find most helpful?
- Is a JSP page being built for the portlet? Only very advanced Kintana users with extensive knowledge of JSP should create their own JSP pages for portlets.

Visualizing the Portlet Query

This example portlet takes information using the following SQL query:

```
SELECT R.REQUEST_ID REQUEST_ID,
  R.REQUEST_NUMBER REQUEST_NUMBER,
  R.DESCRIPTION DESCRIPTION,
  R.CREATED_BY_USERNAME CREATED_BY_USERNAME,
  R.ASSIGNED_TO_USERNAME ASSIGNED_TO_USERNAME,
  R.PRIORITY_MEANING PRIORITY,
  RD.VISIBLE_PARAMETER1 PROGRESS,
  R.USER_DATA5 CURRENT_ CONDITION,
  U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' ||
   U1.EMAIL_ADDRESS ASSIGNED_TO_USER_TOOLTIPS,
  U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' ||
   U2.EMAIL_ADDRESS CREATED_BY_USER_TOOLTIPS,
FROM  KCRT_REQUEST_DETAILS RD,
KNTA_USERS U1,
KNTA_USERS U2,
KCRT_REQUESTS_V R
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
    AND RD.REQUEST_ID = R.REQUEST_ID
   AND R.BATCH_NUMBER = 1
   AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
   AND U2.USER_ID = R.CREATED_BY
   AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
     OR R.CREATED_BY = [SYS.USER_ID])
```

Note

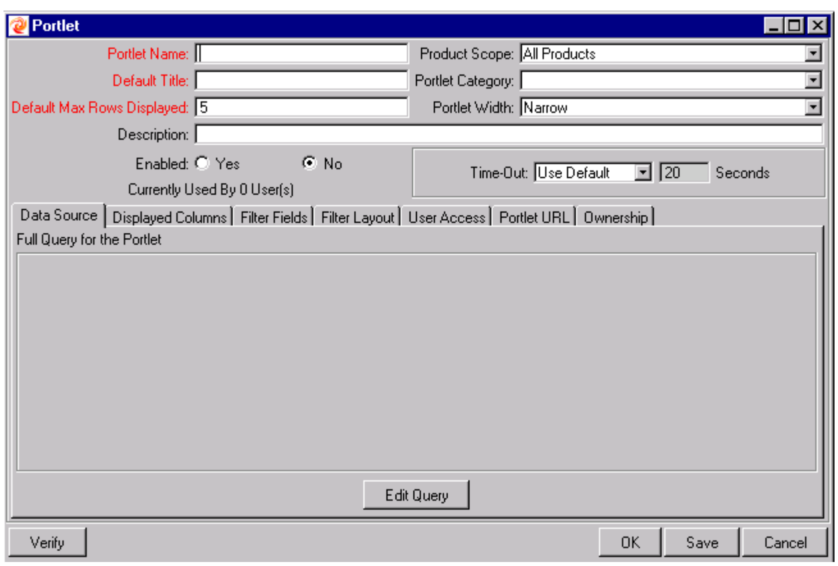
In this example, the REQUEST TYPE '**INTERNAL IS REQUEST**' is being used. The VISIBLE_PARAMETER1 field is a custom field defined in the '**INTERNAL IS REQUEST**' REQUEST TYPE as the Request's progress. The VISIBLE_USER_DATA5 field is a USER DATA field defined in REQUEST TYPE USER DATA to indicate the current status of the request. A drop down list with values **RED**, **YELLOW** and **GREEN** is used for this particular field.

This query will be built line by line in the PORTLET WORKBENCH.

Building the Portlet Query

The following example details the basic steps used to build a portlet using the Kintana Workbench:

1. Open the Kintana Workbench.
2. In the **DASHBOARD** screen group, click the **PORTLETS** icon. The PORTLET WORKBENCH window is returned.
3. Click **NEW PORTLET** in the PORTLET WORKBENCH window. The PORTLET window opens.

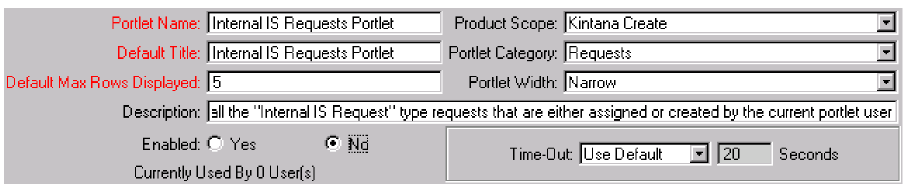


4. Enter the following information into the general information fields:

Table B-1. Portlet General Information Fields

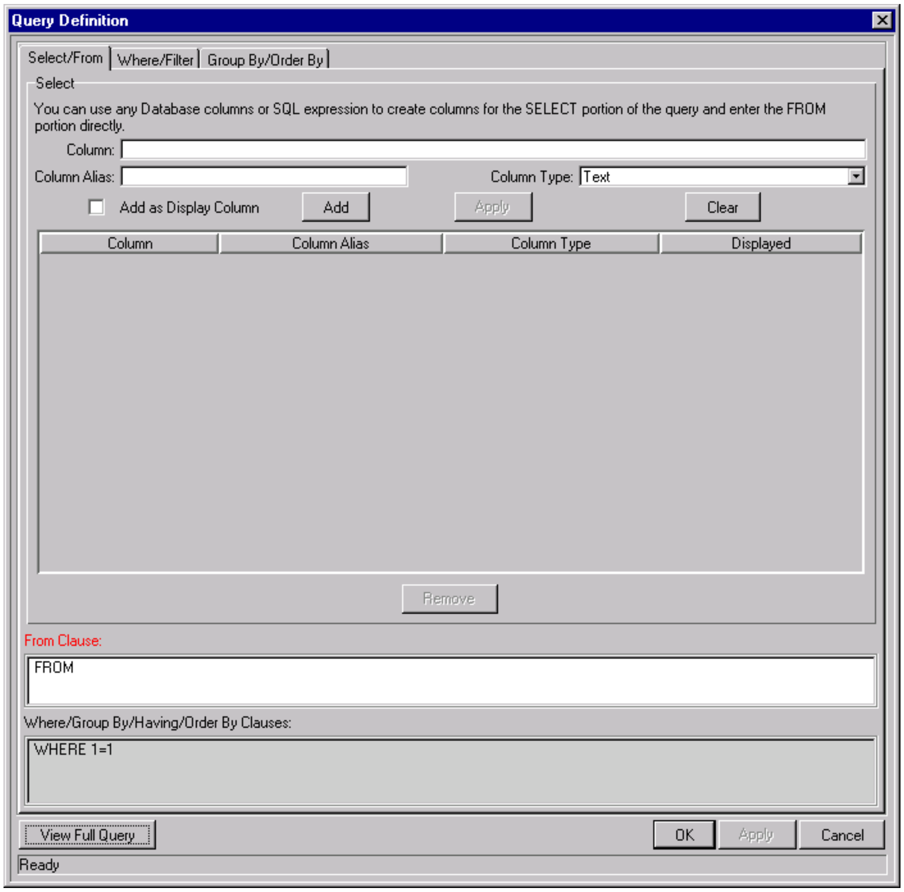
Field	Information
Portlet Name	Internal IS Requests Portlet
Product Scope	Kintana Create
Default Title	Internal IS Requests Portlet
Portlet Category	Requests
Default Max Rows Displayed	5
Portlet Width	Wide
Description	(any useful description)
Enabled	No
Timeout	Use Default

The general information fields should look like this:



5. Click the **Save** button. The edits to the Portlet Workbench window are saved.

6. Click the **Edit Query** button in the **Data Source** tab. The Query Definition window opens.



7. Create the portlet columns. The type of column defines the procedure to follow to create the portlet column. *Table B-2* lists all of the columns for this example, the type of column, and the table listing the parameters for each column.

Note

The user can **Apply** the newly created columns until data is added to the From Clause field.

Table B-2. Example Portlet Columns

Column Name and Type	Table Number
Request ID	*Table B-3*
Request Number (Displayed Column)	*Table B-4*
Description (Displayed Column)	*Table B-5*
Assigned to User Tooltips	*Table B-6*
Created By User Tooltips	*Table B-7*

Column Name and Type	Table Number
Assigned User (Displayed Column)	*Table B-8*
Created By (Displayed Column)	*Table B-9*
Priority (Displayed Column)	*Table B-10*
Progress (Displayed Column)	*Table B-11*
Current Condition (Displayed Column)	*Table B-12*

The following procedure details how to add a non-displayed column:

a. Fill in the fields at the top of the **Select/From** tab. If the column is to be displayed in the portlet. *Table B-3* through *Table B-12* provide the data to be entered in these windows.

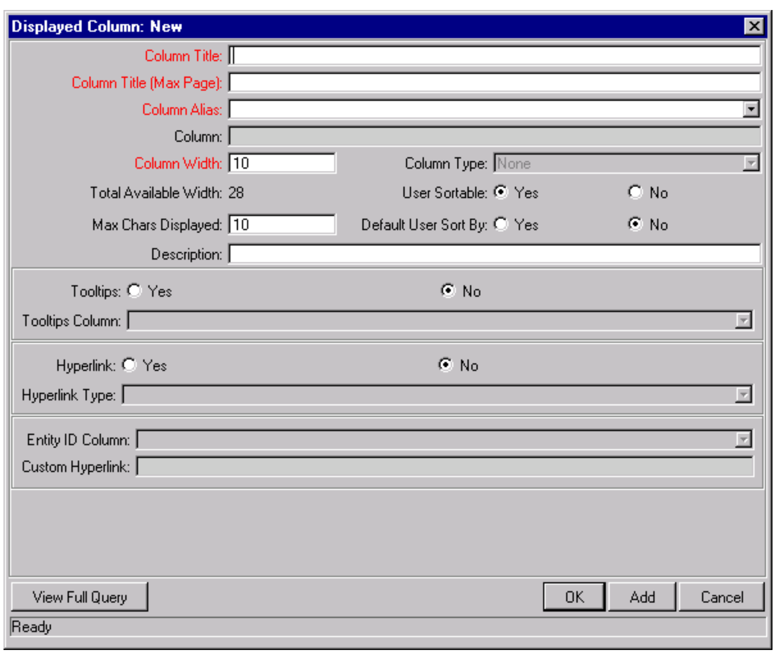
b. Click **Add**. The non-displayed column is added to the column list.

The following procedure details how to add a displayed column:

a. Fill in the fields at the top of the **Select/From** tab. *Table B-3* through *Table B-12* provide the data to be entered in these windows

b. Check the **Add as Display Column** box.

c. Click **Add**. The Column Definition window opens.



d. Fill in the appropriate fields. *Table B-3* through *Table B-12* provide the data to be entered in these windows.

e. Click **OK**. The displayed column is added to the column list.

Note

Make sure to create the columns in the order that they appear in this document. Some column definitions are dependent on others preceding them.

Table B-3. Request ID

Field	Information
Select/From Tab	
Column	R.REQUEST_ID
Column Alias	REQUEST_ID (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Text
Add as Display Column	Unchecked

Table B-4. Request Number (Displayed Column)

Field	Information
Select/From Tab	
Column	R.REQUEST_NUMBER
Column Alias	REQUEST_NUMBER (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Req #
Column Title (Max Page)	Request No
Max Chars Displayed	10
Column Width	10
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	Yes

Table B-4. Request Number (Displayed Column)

Field	Information
Hyperlink Type	Request Detail Page
Entity ID Column	REQUEST_ID

Table B-5. Description (Displayed Column)

Field	Information
Select/From Tab	
Column	R.DESCRIPTION
Select/From Tab	
Column Alias	DESCRIPTION (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Description
Column Title (Max Page)	Description
Max Chars Displayed	12
Column Width	12
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-6. Assigned to User Tooltips

Field	Information
Select/From Tab	
Column	`U1.FIRST_NAME || ' ' || U1.LAST_NAME || ', Email: ' || U1.EMAIL_ADDRESS`
Column Alias	ASSIGNED_TO_USER_TOOLTIPS
Column Type	Text
Add as Display Column	Unchecked

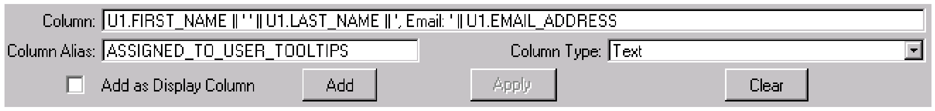


Table B-7. Created By User Tooltips

Field	Information
Select/From Tab	
Column	`U2.FIRST_NAME || ' ' || U2.LAST_NAME || ', Email: ' || U2.EMAIL_ADDRESS`
Column Alias	CREATED_BY_USER_TOOLTIPS
Column Type	Text
Add as Display Column	Unchecked

Table B-8. Assigned User (Displayed Column)

Field	Information
Select/From Tab	
Column	R.ASSIGNED_TO_USERNAME
Column Alias	ASSIGNED_TO_USERNAME (this should be filled in automatically once the 'Column' field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Assigned User
Column Title (Max Page)	Assigned User
Max Chars Displayed	13
Column Width	13
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)

Table B-8. Assigned User (Displayed Column)

Field	Information
Tooltips	Yes
Tooltips Column	ASSIGNED_TO_USER_TOOLTIPS
Hyperlink	No

Table B-9. Created By (Displayed Column)

Field	Information
Select/From Tab	
Column	R.CREATED_BY_USERNAME
Column Alias	CREATED_BY_USERNAME (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text
Add as Display Column	Checked
Column Definition Window	
Column Title	Created By
Column Title (Max Page)	Created By
Max Chars Displayed	10
Column Width	10
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	Yes
Tooltips Column	CREATED_BY_USER_TOOLTIPS
Hyperlink	No

Table B-10. Priority (Displayed Column)

Field	Information
Select/From Tab	
Column	R.PRIORITY_MEANING
Column Alias	PRIORITY (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Text

Table B-10. Priority (Displayed Column)

Field	Information
Add as Display Column	Checked
Column Definition Window	
Column Title	Priority
Column Title (Max Page)	Priority
Max Chars Displayed	8
Column Width	8
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-11. Progress (Displayed Column)

Field	Information
Select/From Tab	
Column	RD.VISIBLE_PARAMETER1
Column Alias	PROGRESS (this should be filled in automatically once the ‘Column’ field is filled and exited)
Column Type	Percentage Bar
Add as Display Column	Checked
Column Definition Window	
Column Title	Progress
Column Title (Max Page)	Progress
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

Table B-12. Current Condition (Displayed Column)

Field	Information
Select/From Tab	
Column	R.USER_DATA5
Column Alias	CURRENT_CONDITION
Column Type	Summary Condition/Exception
Add as Display Column	Checked
Column Definition Window	
Column Title	Summary Condition/Exception
Column Title (Max Page)	Summary Condition/Exception
User Sortable	Yes
Default User Sort By	No
Description	(any useful description)
Tooltips	No
Hyperlink	No

8. Enter the FROM clause in the FROM CLAUSE field:

```
FROM  KCRT_REQUEST_DETAILS RD, KNTA_USERS U1, KNTA_USERS U2,
KCRT_REQUESTS_V R
```

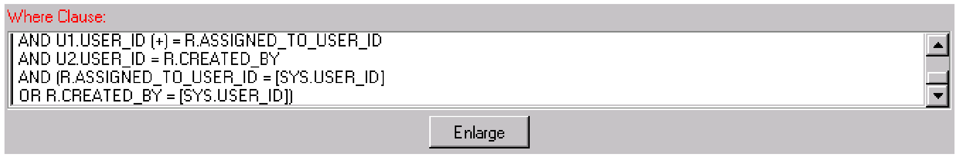
9. Click **APPLY** to save the data entered.

10. It is now time to enter the **WHERE** clause. Click the **WHERE/FILTER** tab in the QUERY DEFINITION window. Enter the **WHERE** clause in the WHERE CLAUSE field:

```
WHERE R.REQUEST_TYPE_NAME = 'Internal IS Request'
    AND RD.REQUEST_ID = R.REQUEST_ID
   AND R.BATCH_NUMBER = 1
   AND U1.USER_ID (+) = R.ASSIGNED_TO_USER_ID
   AND U2.USER_ID = R.CREATED_BY
   AND (R.ASSIGNED_TO_USER_ID = [SYS.USER_ID]
     OR R.CREATED_BY = [SYS.USER_ID])
```

If desired, click **ENLARGE** to open a larger SQL entry area to work in.

11. Click **Apply** when finished to save changes without closing the enlarged window or **OK** to save changes and close the enlarged window.



12. Click **OK** to save the data entered. The Portlet window is displayed.

13. Click **Save** to save the portlet.

14. From the Portlet window, click the **Edit Query** button. The Query Definition window is returned.

15. Click the **Where/Filter** tab. The Where/Filter window is returned.

16. Click **New**. The Filter Field Definition window opens.

17. Create the filter fields. See *Table B-13* for a list of the filter fields and their associated input tables.

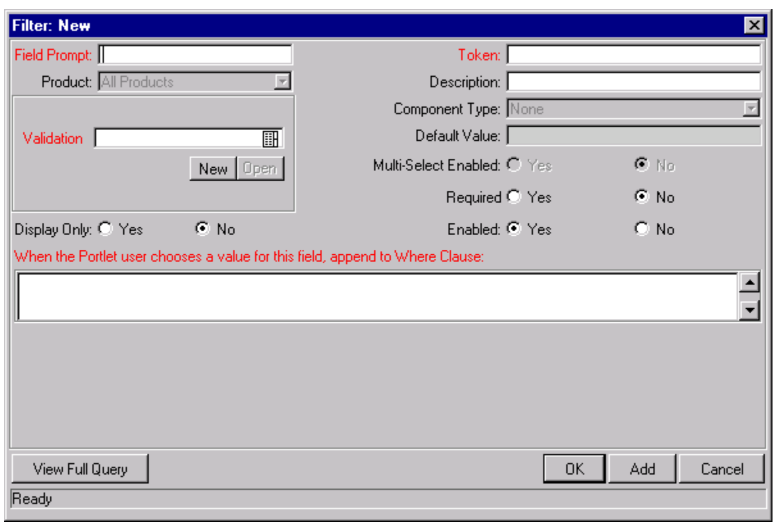


Table B-13. Filter Fields

Filter Field	Table
Request Status Filter Field	*Table B-14*
‘Created From’ Date Filter Field	*Table B-15*

Filter Field	Table
'Created To' Date Filter Field	*Table B-16*
Current Condition Filter Field	*Table B-17*
Priority Filter Field	*Table B-18*

To create a filter field:

a. Fill in the appropriate fields using the data in the following tables and click **ADD**. The filter field is saved and all fields in the FILTER FIELD DEFINITION window are cleared.

b. Repeat until the last filter field. When the information for the last filter field has been entered, click **OK**. The filter field is saved and the FILTER FIELD DEFINITION window closes, returning to the **WHERE/FILTER** tab of the QUERY DEFINITION window.

Table B-14. Request Status Filter Field

Field	Information
Field Prompt	Request Status
Token	P_REQ_STATUS
Description	(any useful description)
Validation	CRT - Request Type Status - All
Multi-Select Enabled	Yes
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.STATUS_ID IN([P.P_REQ_STATUS])`

Table B-15. 'Created From' Date Filter Field

Field	Information
Field Prompt	Created From
Token	P_CREATED_FROM
Description	(any useful description)

Table B-15. 'Created From' Date Filter Field

Field	Information
Validation	Date
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND R.CREATION_DATE >= TO_DATE('[P.P_CREATED_FROM]', 'YYYY-MM-DDHH24:MI:SS')`

Table B-16. 'Created To' Date Filter Field

Field	Information
Field Prompt	To
Token	P_CREATED_TO
Description	(any useful description)
Validation	Date
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	`AND TO_DATE(R.CREATION_DATE || '00:00:00', 'YYYY-MM-DD HH24:MI:SS') <= TO_DATE([P.P_CREATED_TO], 'YYYY-MM-DDHH24:MI:SS')`

Table B-17. Current Condition Filter Field

Field	Information
Field Prompt	Current Condition
Token	P_CONDITION
Description	(any useful description)
Validation	DRV - Summary Condition
Multi-Select Enabled	Yes
Required	No
Display Only	No
Enabled	Yes

Table B-17. Current Condition Filter Field

Field	Information
When the Portlet user chooses a value for this field, append to Where Clause	**AND R.USER_DATA5 IN ([P.P_CONDITION.TO_STRING])**

Table B-18. Priority Filter Field

Field	Information
Field Prompt	Priority
Token	P_PRIORITY
Description	(any useful description)
Validation	CRT - Priority - Enabled
Required	No
Display Only	No
Enabled	Yes
When the Portlet user chooses a value for this field, append to Where Clause	**AND R.PRIORITY_CODE = '[P.P_PRIORITY]'**

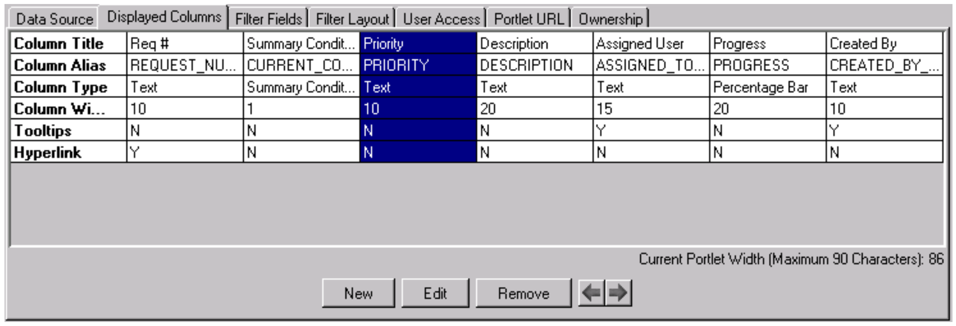
18. Click **APPLY** to save the data entered.

19. Click **OK** to save the portlet. The PORTLET window is returned.

20. In the PORTLET window, click the **DISPLAYED COLUMNS** tab. The DISPLAYED COLUMNS window is displayed.

21. Using the arrow buttons ( and ), arrange the columns to appear in the following order, left to right:

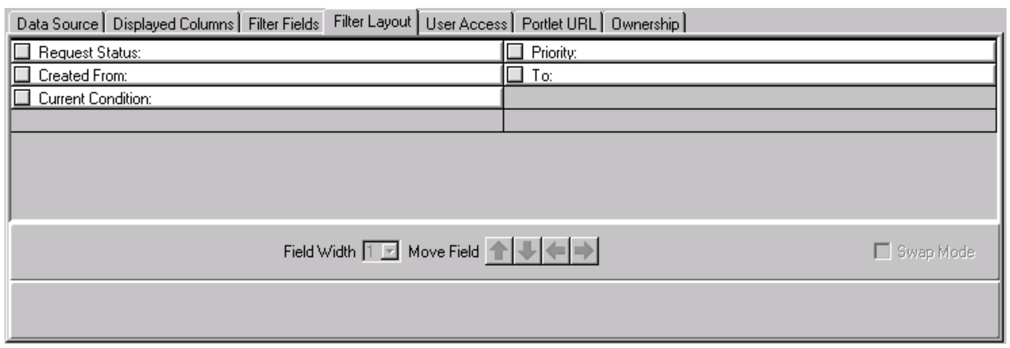
    REQ # - SUMMARY CONDITION - PRIORITY - DESCRIPTION - ASSIGNED USER - PROGRESS - CREATED BY



22. Click **SAVE** to save the data entered.

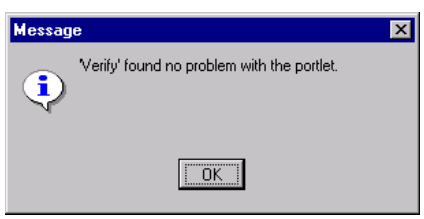
23. In the PORTLET window, click the **FILTER LAYOUT** tab. The FILTER LAYOUT window is displayed.

24. Arrange the layout according to the following illustration:



25. Click **SAVE** to save the portlet.

26. In the PORTLET window, click **VERIFY**. The following question dialog box should appear:



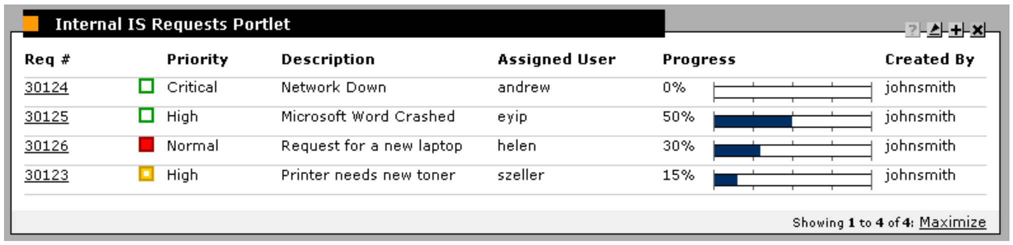
If the VERIFY PORTLET window illustrated in <KAppRefGuide> appears instead, fix the problems it indicates and click **VERIFY** again until portlet is without problems and the question dialog pictured above appears.

27. In the PORTLET window, set the ENABLED radio button to **YES**

28. Click **SAVE** to enable the portlet without closing the PORTLET window. Click **OK** to save changes and close the PORTLET window.

29. Open the Kintana Dashboard.

30. Add the **INTERNAL IS REQUESTS** portlet to the Dashboard using the PERSONALIZE page. The portlet should appear where it was placed. The following represents what the portlet should look like:



Internal IS Requests Portlet

Req #	Priority	Description	Assigned User	Progress	Created By
30124	Critical	Network Down	andrew	0%	johnsmith
30125	High	Microsoft Word Crashed	eyip	50%	johnsmith
30126	Normal	Request for a new laptop	helen	30%	johnsmith
30123	High	Printer needs new toner	szeller	15%	johnsmith

Showing 1 to 4 of 4: Maximize

The custom portlet has been successfully created.

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