KINTANA™
Using the Kintana Workbench

Version 5.0.0
Publication Number: UsingWorkbench-0603A

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

Contents

Chapter

1

Introduction

The Kintana Product Suite features two interfaces: the Kintana interface and the Kintana Workbench interface. The Kintana interface uses HTML and Javascript to provide users with access to many key areas of functionality. The Kintana interface lets users of each product in the suite perform common tasks without requiring a Power License.

The Kintana Workbench is a Java applet designed to help Kintana Administrators, product configuration experts, and Power Users to perform advanced configuring and processing tasks, such as creating entities (like Request Types, Object Types, and Workflows). The Kintana Workbench can also query detailed information on a specific entity, such as a particular Package. Most entities within the Kintana Product Suite can be accessed through the Workbench.

The Workbench is used to:

- Create and configure Kintana entities such as Request Types, Object Types, and Workflows.

- Define Environments for your distribution and deployment processes.

- Configure field validations and logic.

- Create Project plans in Kintana Drive.

- Set user access and security through licensing and entity configuration.

- Create custom Reports and synchronize them with the Reporting Meta Layer.

- Manage your Kintana instances using the Migrator Object Types.

Users Who Should Read This Guide

This guide is intended for the following sets of users:

- Users who configure the Kintana application for:

    o Request resolution

    o Distribution and deployment

    o Other Workflow-based systems

- Users who create and manage Projects

- Users who create and process Packages

- Users who create and manage Releases

- Users who configure and maintain portlets

- Users who maintain Kintana instances along with user setup and screen access

- Users who maintain the Kintana database, server and web server

- Users who maintain LDAP and any other third-party integration

Licensing and Functionality

Only users with a Power license can access the Kintana Workbench. If you need access to the Kintana Workbench, contact your Kintana Instance Administrator.

How to Use This Guide

This guide will help you to better understand and navigate through the Kintana Workbench interface. This document contains the following chapters:

- *Navigating Screens* — Explains navigation between screen groups in the Kintana Workbench, as well as navigation using the **NAVIGATE** menu.

- *Navigating Detail Windows* — Gives the details on navigating to specific detail windows in the Kintana Workbench. Entity-dependent menus like the **REQUEST TYPE** and **DISTRIBUTION** menus are also discussed.

- *Workbench Settings* — Explains the regional and other settings for the Kintana Workbench that can be configured on a per-user basis.

- *Field Formats* — Discusses each field format in the Kintana Workbench and how it is used, such as auto-complete fields, text areas, and drop down lists.

> Note
>
> This document assumes the user has access to all screen groups and screens. See *"Kintana Security Model"* for more detailed information on users and screen access.

Browser Considerations

The following browser-specific issues may impact your use of the Workbench:

- *Netscape 7 and the Kintana Workbench*

- *Pop-Up Blockers*

- *Java Plug-In Defaulting Issues*

Netscape 7 and the Kintana Workbench

If you are using Netscape 7, ensure that the COMPARE THE PAGE IN THE CACHE TO THE PAGE ON THE NETWORK setting is not set to **NEVER**. If it is set to **NEVER**, the Kintana Workbench will not open.

This setting can be reached from the PREFERENCES dialog in the **ADVANCED -> CACHE** settings.

Pop-Up Blockers

If you have installed a pop-up blocker on your web browser, you will not be able to open the Kintana Workbench, nor will auto-complete lists in the Kintana interface function.

Java Plug-In Defaulting Issues

Users of the Kintana Workbench may run into issues resulting from the Java Plug-In setting itself as the default JVM for their browser.

- The Kintana Workbench may throw a "class not found" exception error.

- The user may have other applications requiring different versions of the Java Plug-In.

To resolve these issues, remove the default browser associations for all versions of the Java Plug-In.

1. Open your Windows Control Panel and find the Java Plug-In icon. Each Plug-in version will have a icon, but by opening them and inspecting the **ABOUT** tab you can readily identify the newly installed Java Plugin 1.4.1_02.
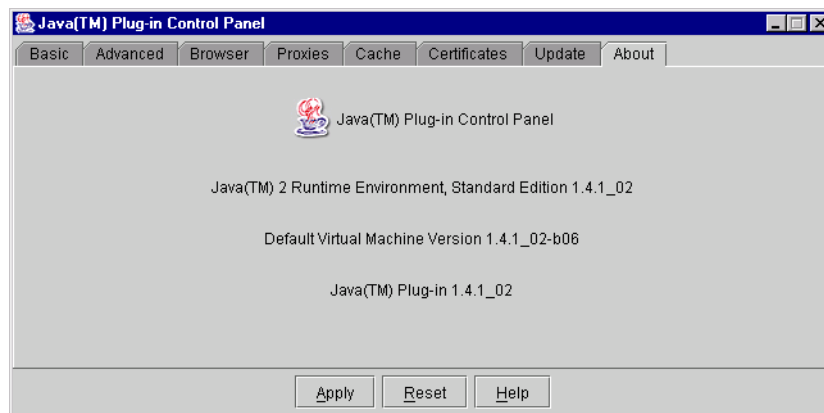
2. Click the **BROWSER** tab and uncheck the default browser associations.
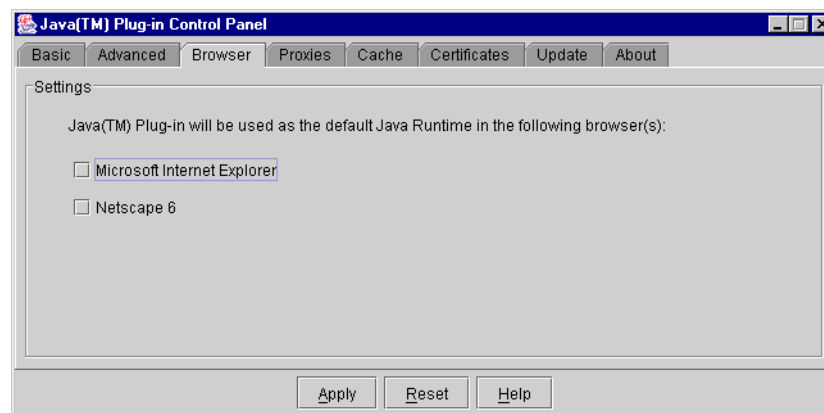
3. After you apply the changes, your other applications will be able to use their desired version of the Java Plug-in and the Workbench will function properly.

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

Navigating Screens

This chapter describes the different ways of navigating between the screens and screen groups in the Kintana Workbench. See the following sections for more detailed information:

- *Screen Groups and Screens*

- *Menu Navigation*

Screen Groups and Screens

Kintana administration and configuration is performed in the Kintana Workbench by accessing the functions available in the various screen groups. The **CONFIGURATION** and **SYS ADMIN** screen groups, which appear as tabs located on the left side of the application, provide features which are common across all Kintana products. Functions inside the Kintana **DELIVER**, Kintana **DRIVE**, and Kintana **CREATE** screen groups are specific to their respective products. The Kintana **DASHBOARD** screen group lets the Kintana Administrator create custom Portlets.

Each screen group contains a sets of screens, which consist of an entity workbench window and any number of detail windows. Screens are represented as icons below the screen groups, and perform end-user as well as configuration functions. *Figure 2-1* illustrates a screen group, screen, workbench window, and detail window.

> Example
>
> In the Kintana Create screen group, the Reports screen allows users to create and submit Reports, while the Request Types screen is used to create and configure Request Types.
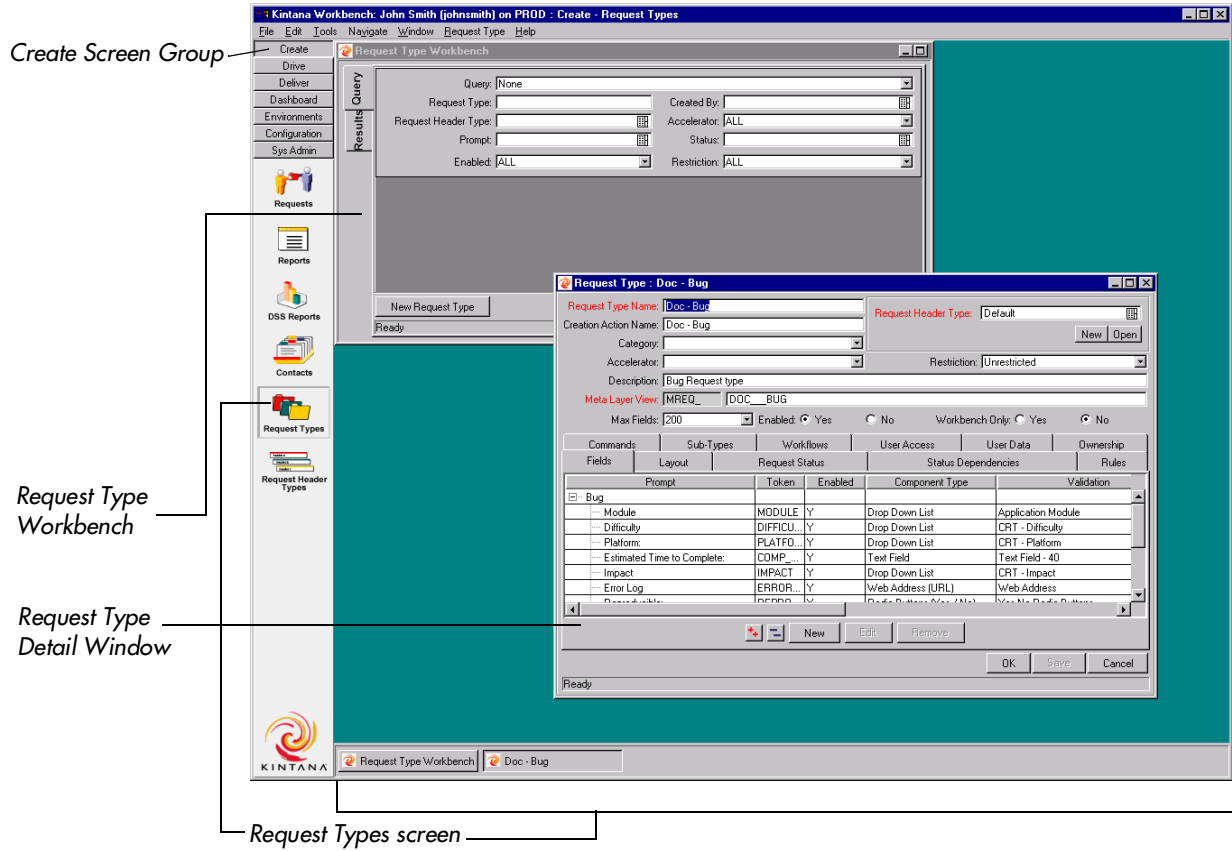
Figure 2-1 Screen Group, Screen, Workbench Window, and Detail Window

Clicking on a screen group opens a different set of screens.
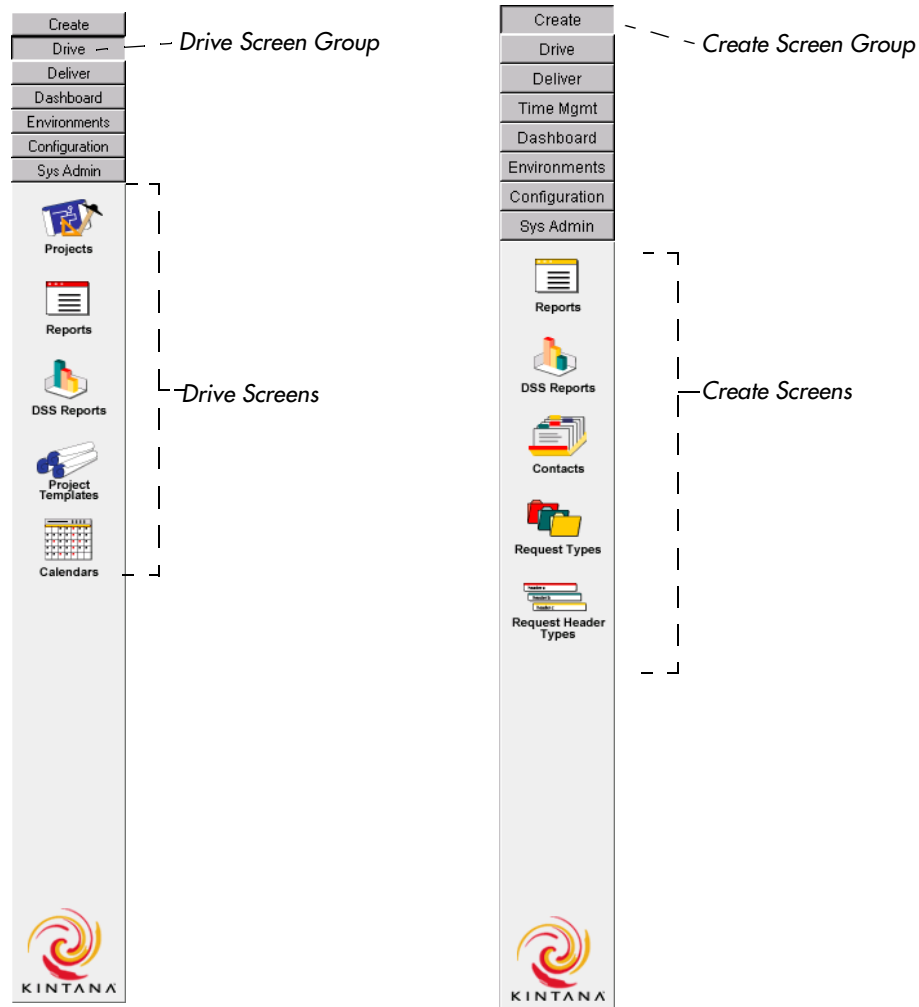
Figure 2-2 Different Screen Groups and Screens

Note	Depending on your level of access to the system, certain screen groups or screens may not be available to you. This guide discusses all available screen groups and screens.

The following sections discuss each screen group in more detail:

- *Kintana Create Screen Group*

- *Kintana Drive Screen Group*

- *Kintana Deliver Screen Group*

- *Dashboard Screen Group*

- *Environments Screen Group*
- *Configuration Screen Group*
- *Sys Admin Screen Group*

Kintana Create Screen Group

The **CREATE** screen group contains the Kintana Create-specific functions for system configuration. Access the Create screen group by clicking **CREATE** at the top of the screen group bar.
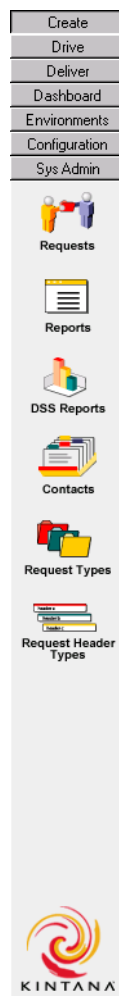
Figure 2-3 Kintana Create screen group bar

The Kintana **CREATE** screen group consists of the following:

- *Reports*

- *DSS Reports*
- *Contacts*
- *Request Types*
- *Request Header Types*

Reports

The REPORTS WORKBENCH window is used to run standard and custom Kintana Create reports. These include reports regarding system set-up, specific configurations, as well as end user reports such as Request Details or Contact Details.

For more detailed information on running reports, see *"Processing Requests"*.

DSS Reports

Similar to the REPORTS screen, this function is used to run and view end user Decision Support System (DSS) graphical reports.

For more detailed information on running reports, see *"Processing Requests"*.

Contacts

The CONTACTS WORKBENCH window is used to quickly generate new contacts as well as edit existing contact information. Standard information is collected in the CONTACT window, such as LAST NAME and PHONE NUMBER. The CONTACT window can also be configured to capture additional information by using the User Data functionality.

For more information on the Contacts interface, see *"Create Workbench Reference"*.

Request Types

A Request Type is a type of template that defines the nature of a Request in Kintana Create. A few of the available system Request Types are Bug, Enhancement Request, and Patch Request. The fields that appear when a Request is generated are based on the Request Type. The base install of Kintana Create includes default Request Types which can be customized. Custom Request Types can also be created from scratch. Additionally, the Request Type is used to determine the default Workflow through which a Request will be routed.

For more detailed information on setting up Request Types, see *"Configuring a Request Resolution System"*.

Request Header Types

Similar to the REQUEST TYPES screen, the REQUEST HEADER TYPES screen enables Request Headers to be changed to have one of several header field configurations. Request Header Types are used to customize which header fields appear, as well as the layout of these fields.

For more detailed information on setting up Request Header Types, see *"Configuring a Request Resolution System"*.

Kintana Drive Screen Group

The Kintana **DRIVE** screen group contains the project management functions for Kintana Drive, as well as the Kintana Drive-specific functions for system configuration. Access the Kintana **DRIVE** screen group by clicking **DRIVE** at the top of the screen group bar.
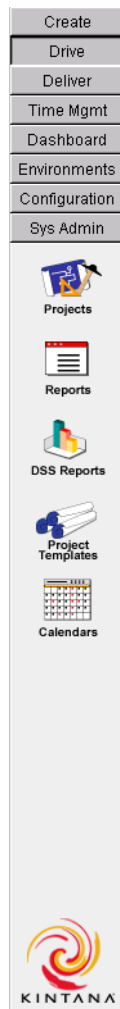
Figure 2-4 Kintana Drive screen group bar

The Kintana **DRIVE** screen group consists of the following:

- *Projects*

- *Reports*

- *DSS Reports*

- *Project Templates*

- *Calendars*

Projects

The Project is the fundamental entity of Kintana Drive. The PROJECT screen contains all of the information that is normally required to manage a Project.

For more detailed information on Projects, see *"Working with Projects"*.

Reports

Use the REPORTS WORKBENCH window to run standard and custom Kintana Drive reports. These include reports regarding system set-up, specific configurations, and end user reports such as Project Details.

For more detailed information on running reports, see *"Working with Projects"*.

DSS Reports

Similar to the REPORTS WORKBENCH, the DSS REPORTS WORKBENCH provides the ability to run and view end user Decision Support System (DSS) graphical reports.

For more detailed information on running reports, see *"Working with Projects"*.

Project Templates

Project Templates are reusable collections of Project parameters and processes that can be applied to any Project. This allows project managers to rapidly create customized project plans. The PROJECT TEMPLATE screen captures basic Project Template information. This information helps to create reusable Project structures and hierarchies.

For more detailed information on working with Project Templates, see *"Working with Projects"*.

Calendars

The CALENDAR WORKBENCH is an area where project managers can record company and individual working and non-working days. This information is then used by the scheduling engine to aid in determining project start and finish dates.

For more detailed information on setting up calendars, see *"Working with Projects"*.

Kintana Deliver Screen Group

The **DELIVER** screen group contains both the end user functions for Kintana Deliver as well as the Kintana Deliver-specific functions for system

configuration. Access the Kintana **DELIVER** screen group by clicking **DELIVER** at the top of the screen group bar.
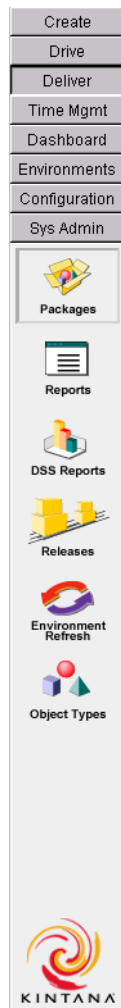

Figure 2-5 Kintana Deliver screen group bar

The Kintana **DELIVER** screen group consists of the following:

- *Packages*

- *Reports*

- *DSS Reports*

- *Releases*

- *Environment Refresh*

- *Object Types*

Packages

The Package is the fundamental entity of Kintana Deliver. The Package contains all of the information needed to process the Package, including the Package Type, priority, and status. The Package also contains a list of all objects to be tracked and/or migrated as the Package moves through the Workflow. Each object is included on a separate Package Line. While each Line can be acted upon separately, the group of Package Lines and objects represents a logical unit that should move and be tracked together. The processing of a Package and Package Lines can vary greatly depending upon the Workflow specified for that Package.

For more detailed information on working with Packages, see *"Processing Packages"*.

Reports

The REPORTS WORKBENCH window is used to run standard and custom Kintana Deliver reports. These include reports regarding system set-up, specific configurations, and end user reports such as Package Details or Object Migration History.

For more detailed information on running reports, see *"Processing Packages"*.

DSS Reports

Similar to the REPORTS WORKBENCH, the DSS REPORTS WORKBENCH is used to run and view end user Decision Support System (DSS) graphical reports.

For more detailed information on running reports, see *"Processing Packages"*.

Releases

Using the RELEASE screen, Kintana Deliver users can manage and control changes to eBusiness environments by grouping them in scheduled releases. Releases codify best practices and easily manage complex Package dependencies.

For more detailed information on working with Releases, see *"Configuring a Release Management System"*.

Environment Refresh

During the course of day-to-day application management activity, specific software changes are migrated to various instances in a controlled manner using Kintana Deliver. Kintana Deliver maintains an audit trail of all this activity, providing clear visibility to all the changes for each environment.

However, there are situations when it is necessary to "refresh" an environment, essentially replacing that environment with a physical copy of another environment.

Following a physical refresh, Kintana Deliver has the ability to update its audit history and its in-process Packages. This update is performed through the ENVIRONMENT REFRESH screen.

For more detailed information on using the Environment Refresh functionality, see *"Deliver Workbench Reference"*.

Object Types

The OBJECT TYPES screen can be used to define the different types of entities to be controlled and migrated. Object Types are user-configurable. Every Object Type has a unique set of fields that determines the information it requires, as well as any additional information it may accept. Each Object Type can also have associated Commands which determine its behavior as it moves from one Environment, or Environment Group, to another. Commands are used to define what a migration means for each type of Object.

Example — A File Object Type might only require the copying of a file while a Database Script Object Type might require both the copying of a file, as well as executing it against the destination database.

For more information on working with Object Types, see the *"Configuring a Deployment System in Kintana"* Business Application Guide.

Dashboard Screen Group

The **DASHBOARD** screen group contains all of the functions required for creating custom Portlets. Access the **DASHBOARD** screen group by clicking **DASHBOARD** in the middle of the screen group bar. The **DASHBOARD** screen group is shown in *Figure 2-6*.
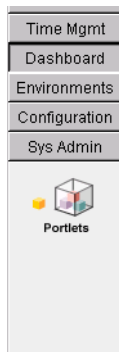
Figure 2-6 Dashboard screen group bar

The **DASHBOARD** screen group consists of the *Portlet* screen.

Portlet

The PORTLET WORKBENCH window is used to query for and list specific Portlets, as well as create new ones. Kintana Administrators can create custom Portlets according to their organization's business requirements.

Custom portlets are created in the PORTLET window by identifying the information to be displayed in the portlet, designing a database query to retrieve the information and creating a portlet configuration that will perform these steps. In order to create custom portlets, the configuring user should know SQL programming and understand the Kintana data model.

After creating the custom portlets, the configuring user can distribute them to users across the organization.

For more detailed information on configuring portlets, see *"Configuring the Kintana Dashboard"*.

Environments Screen Group

The **ENVIRONMENTS** screen group contains all of the functions required for general Environment and Environment Group configuration. Access the **ENVIRONMENTS** screen group by clicking **ENVIRONMENTS** in the middle of the screen group bar. The **ENVIRONMENTS** screen group is shown in *Figure 2-7*.

Figure 2-7 Environments screen group bar

The Kintana **ENVIRONMENTS** screen group consists of the following:

- *Environments*
- *Environment Groups*

Environments

The ENVIRONMENT screen is used to create and maintain Environments. A Kintana Environment is comprised of a unique combination of server, client, database, and file system information which represents one logical group. Environments are typically used in distribution and deployment systems. For example, the DEV Environment specifies the machines and database that represent the Development instance in the enterprise.

A particular machine may be referenced by more than one Environment. For example, the same UNIX machine might hold the databases for two different Environments, one used for Development and the other for Quality Control.

The Environment server is the main host machine for the Environment. This machine may be of any platform type: UNIX, Windows NT, etc. Typically, the server is a UNIX machine that houses both the application files and the database for this environment.

The Environment client is the remote client machine for the specified Environment. The client is typically defined when users are performing multi-platform development in a client/server environment (some development is done on UNIX, and some on Windows NT). The client may correspond to a file server that stores client code accessed by users.

> **Note** The terms 'server' and 'client' are defined very specifically for Kintana Deliver Environments.

For more detailed information on working with Environments, see the *"Configuring a Deployment System in Kintana"* Business Application Guide or the *"Environment Workbench Reference"* Application Reference Guide.

Environment Groups

The ENVIRONMENT GROUPS screen is used to create and maintain Environment Groups. Environment Groups define a set of Kintana Environments that can be referenced as the Sources or Destinations for object migrations. Environment Groups are designed to facilitate the migration of objects to multiple Environments. A Source Environment Group and Destination Environment Group can be specified when configuring a Workflow Execution step.

For more detailed information on working with Environment Groups, see the *"Configuring a Deployment System in Kintana"* Business Application Guide or the *"Environment Workbench Reference"* Application Reference Guide.

Configuration Screen Group

The **CONFIGURATION** screen group contains all of the functions required for general system configurations of the Kintana Product Suite. Access the **CONFIGURATION** screen group by clicking **CONFIGURATION** near the top of the screen group bar.
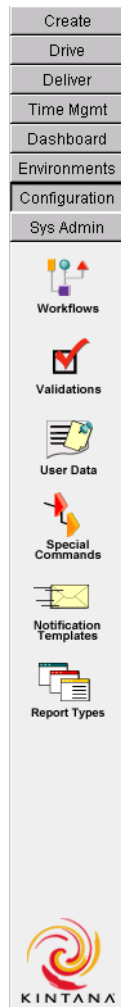
Figure 2-8 Configuration screen group bar

The Kintana **CONFIGURATION** screen group consists of the following:

- *Workflows*

- *Validations*

- *User Data*

- *Special Commands*

- *Notification Templates*

- *Report Types*

Workflows

The WORKFLOW screen is used to create and maintain Workflows that can potentially be used by all Kintana products. A Workflow consists of a logical series of steps that defines a business process. Business process routing is configurable with the Kintana Product Suite, handling virtually any situation. This allows an organization to generate Workflows to automate existing processes, rather than forcing users to adopt a new set of processes to perform their work.

- For more detailed information on configuring Workflows for Request resolution, see the *"Configuring a Request Resolution System"* Business Application Guide.

- For more detailed information on configuring Workflows for software deployment and distribution, see the *"Configuring a Deployment System in Kintana"* Business Application Guide.

- For more detailed information on configuring Workflows for Release Management, see the *"Configuring a Release Management System"* Business Application Guide.

Validations

The VALIDATIONS screen is used to create and maintain Validations in the Kintana system. Validations determine the acceptable values that may be used in user-defined custom fields, such as those found in Request Types, Workflow Steps and Object Types. Validations enforce data integrity by ensuring that the proper information is entered in a field before it is saved to a database. For example, Validations can be used to ensure that no textual information is entered into a numeric field, or that valid dates are entered into a date field.

More complex Validations can be used to verify such information as whether or not a user assigned to a task is a valid Kintana user. These Validations can be based on values returned from a database query or the execution of a system command.

- For more detailed information on configuring Validations for Request resolution, see the *"Configuring a Request Resolution System"* Business Application Guide.

- For more detailed information on configuring Validations for software deployment and distribution, see the *"Configuring a Deployment System in Kintana"* Business Application Guide.

User Data

Every entity (Workflow, Package, Environment, etc.) in the Kintana Product Suite comes with a set of standard fields. Every entity also has the flexibility to hold additional information specific to business processes. The USER DATA screen provides the ability to create fields to capture this additional information.

For more detailed information on configuring User Data, see the User Data chapter in *"Configuring a Request Resolution System"* or *"Configuring a Deployment System in Kintana"*.

Special Commands

The SPECIAL COMMANDS screen is used to create and maintain Special Commands. Special Commands are commands with variable parameters used in Object Types, Report Types, and Request Types command steps to perform a variety of functions such as copying files between Environments and establishing connections to Environments for remote command execution. The Kintana Product Suite includes two types of Special Commands:

1. Predefined Special Commands - These commands are read-only and are denoted by the naming convention 'ksc_command_name'

2. User Defined Special Commands - These commands are defined by the user and denoted by the naming convention 'sc_command_name'

For more detailed information on configuring and using Special Commands, see *"Using Commands and Tokens"*.

Notification Templates

Notifications are sent out by Kintana products to let users know the status of a Package, Request, or Project. Notification Templates can be defined for standard messages that may be required on multiple Workflow steps. The NOTIFICATION TEMPLATES screen is used to create and maintain these Templates.

Fore more detailed information on configuring Notification Templates, see *"Configuration Workbench Reference"*.

Report Types

Report Types define the standard or custom reports defined within the Kintana Product Suite. These reports are configurable and can be run by both the administrators and the end users to show information in the system. The reports are run from the Reports or DSS Reports screen and produce textual

and graphic reports that are viewable through a Web browser. The REPORT TYPES screen is used to create and maintain Report Types.

For more detailed information on working with Report Types, see *"Kintana Reports"*.

Sys Admin Screen Group

The **SYS ADMIN** screen group contains all of the functions required to generate access levels for the Kintana products and grant access to individual users. Access the **SYS ADMIN** screen group by clicking **SYS ADMIN** near the top of the screen group bar.
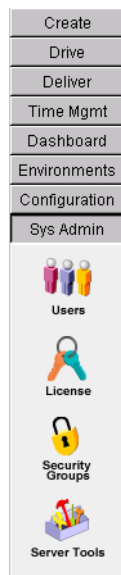
Figure 2-9 Sys Admin screen group bar

The Kintana Sys Admin screen group consists of the following:

- *Users*
- *License*
- *Security Groups*
- *Server Tools*

Users

The USERS screen is used to create and maintain all users in the Kintana system. Kintana provides a secure access mechanism and a complete audit trail

of activity. Each user definition contains essential information about the user, including the user's email address, start and end dates, the applications for which the user is authorized, and the security groups to which the user belongs.

For more detailed information on creating and working with users, see the "Users and Licensing" Instance Administration Guide.

License

The License Administration window provides a means of assigning licenses to multiple users at once, or modifying the license assignments to already-licensed users.

Security Groups

The SECURITY GROUPS screen is used to create and maintain Security GRoups. Security Groups provide a means of grouping users together into Workflow access levels. Security Groups are granted access to appropriate steps on an individual Workflow basis. For example, in a sample Workflow DEV->TEST->PROD, the 'Developers' security group might be given access to migrate objects to TEST, but not be given access to migrate objects to PROD. Only the 'Config. Management' group might be allowed to affect the production instance. Additionally, Security Groups can be used to limit the entities a group of users can modify or create (however, if a user has access to a given product, they can always view all data for that product).

- For more detailed information on working with Security Groups, see *"Kintana Security Model"*.

Server Tools

The SERVER TOOLS screen provides the ability to view the technical status of the Kintana application server. This screen offers a series of queries against the Kintana server to give information such as connected users and number of database sessions. This screen is primarily for the system administrator to view application activity and trouble-shoot connection problems.

For more detailed information on working with Server Tools, see *"Kintana System Administration Guide"*.

Menu Navigation

The **NAVIGATE** menu at the top of the Kintana Workbench can be used in lieu of the screen group bar, if you so desire.

You can choose to not display the screen group bar in the Kintana Workbench by selecting the appropriate options in the **GENERAL** tab of the USER PROFILES window.
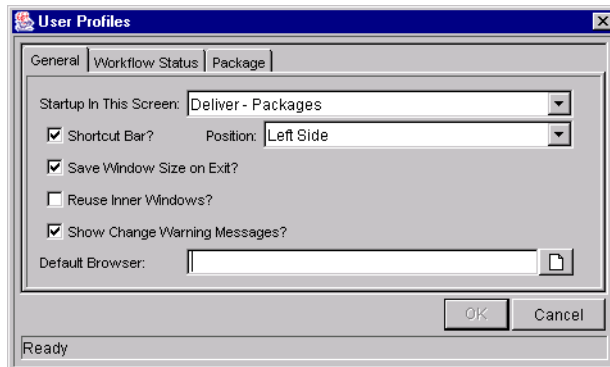

Figure 2-10 User Profiles Window - General Tab

For more detailed information on the USER PROFILES window, see *"User Profiles"* on page 43.

If you choose not to display the screen group bar, you can navigate to all accessible screen groups and the Kintana interface through the **NAVIGATE** menu at the top of the Kintana Workbench. The **NAVIGATE** menu's structure mimics that of the screen group bar, and is accessible at all times.
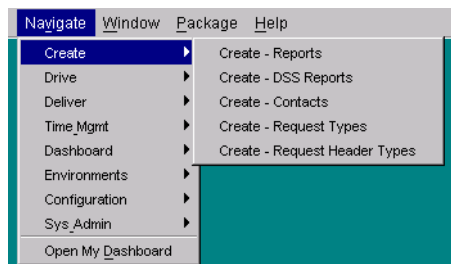
Figure 2-11 Navigate Menu

Chapter
3

Navigating Detail Windows

This chapter describes the different ways of navigating between detail windows in the Kintana Workbench, including discussion of the workbench windows and window buttons. Several Kintana entities also feature additional configuration options accessible from entity-dependent menus at the top of the Workbench; these menus are also discussed. See the following sections for more detailed information:

- *Navigating Between Detail Windows*
- *Entity-Dependent Menus*

Navigating Between Detail Windows

Screens in Kintana are reached by clicking their icons in the screen group bar. They typically consist of an entity workbench window and any combination of detail windows.

Examples of entities with workbench windows include:

- Request Types
- Request Header Types
- Projects
- Portlets
- Object Types
- Environments
- User Data
- Validations
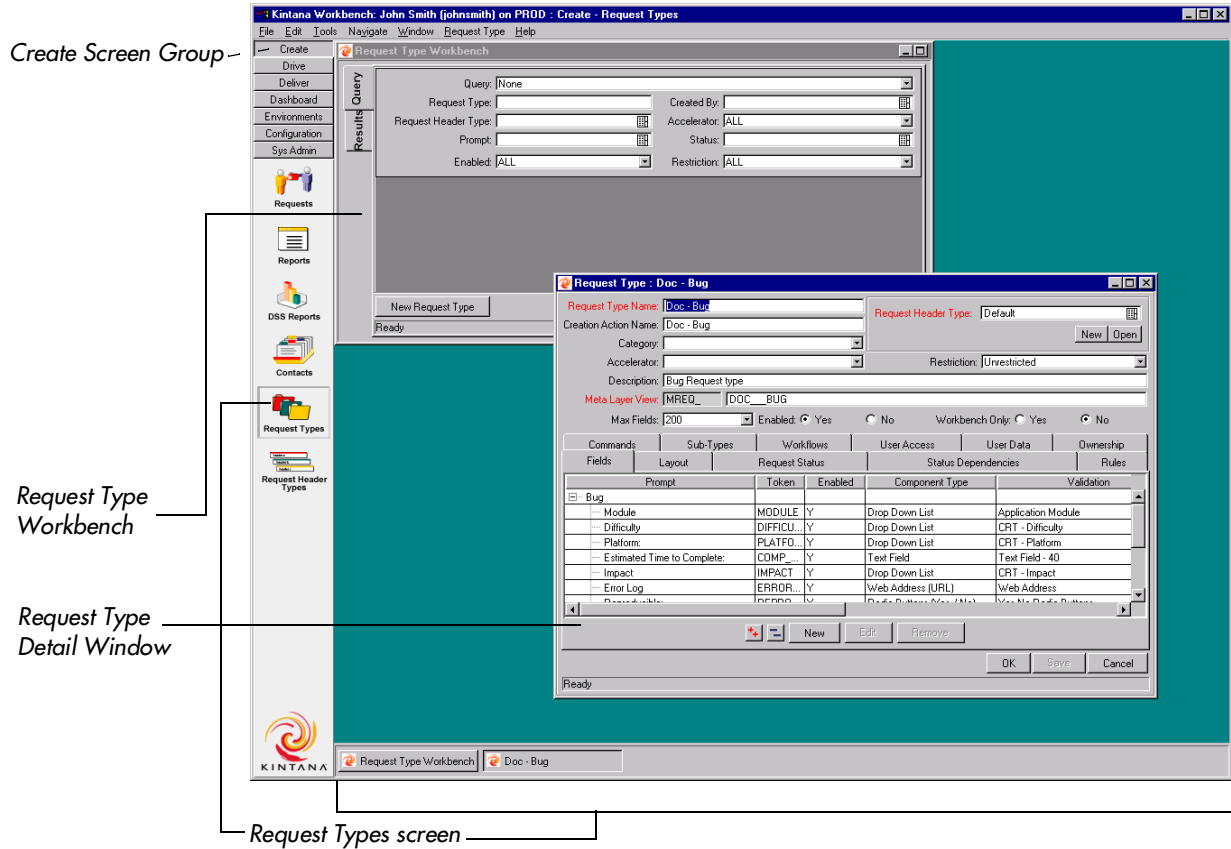
*Figure 3-1 Screen Group, Screen, Workbench Window, and Detail Window*

Detail windows are reached through the entity workbench window, which consists of a **QUERY** tab and a **RESULTS** tab. *Figure 3-2* illustrates how to navigate to the detail window for an existing entity from a workbench window.

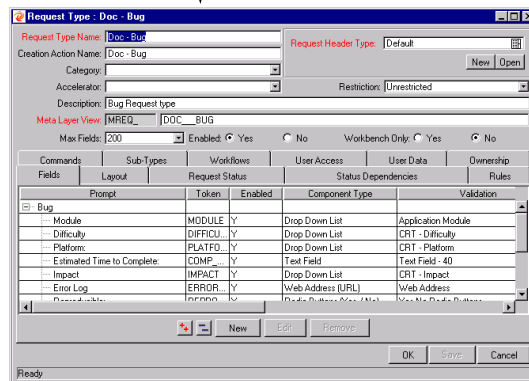*1. Enter search criteria and click **List** to see matching results.*
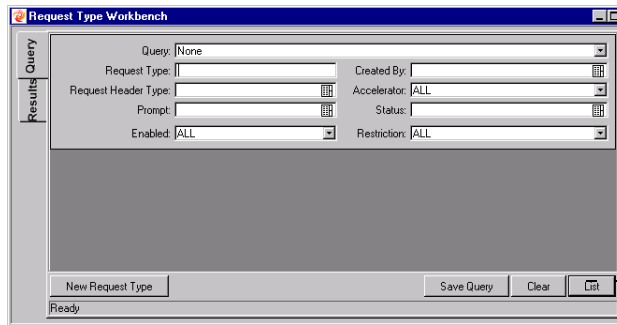
Request Type Workbench Query Tab

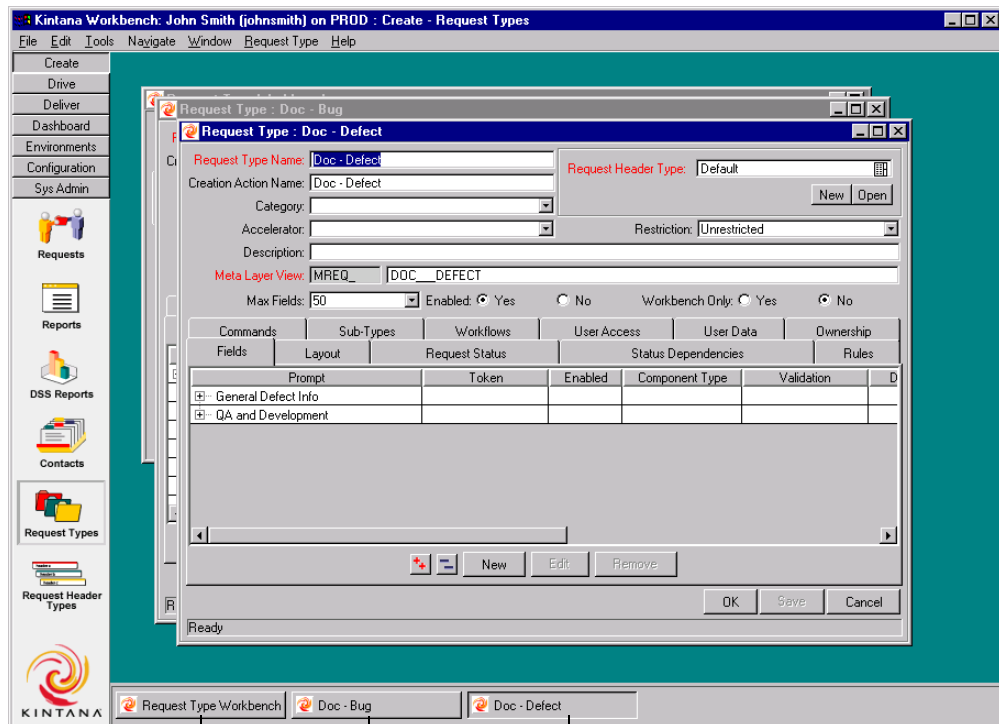*2. Select the desired entity and click **Open** to view details.*
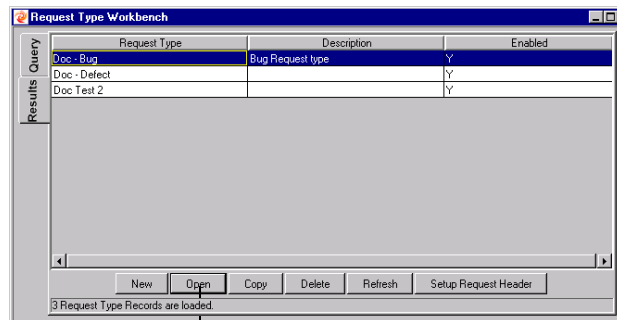
Request Type Workbench Results Tab

3. Detail window opens.

Request Type Detail Window (Bug)

Figure 3-2 Navigating to a detail window

If multiple detail windows have been opened, they can be accessed using the buttons at the bottom of the Workbench.

Click to access workbench or detail windows

Figure 3-3 Navigating between multiple open detail windows

For more detailed information on searching for entities, see *"Searching for Entities and Using Advanced Searches"* on page 34.

For more detailed information on the specific fields in each entity workbench window's **QUERY** tab, consult the appropriate Kintana Application Reference Guide for the screen group in question.

Searching for Entities and Using Advanced Searches

The entity workbench window provides an interface for users to search for a specific entity, such as a Package or Request Header Type. These entities are selected by entering search criteria in the **QUERY** tab of the workbench, which then returns the matching records in the **RESULTS** tab of the workbench. The entity workbench window cannot be closed, only minimized.

To search for an entity, you can enter criteria in any combination into the fields in the **QUERY** tab. Clicking **LIST** will search for all records that match your

criteria and report the results in the **RESULTS** tab. See the following topics for more detailed information:

- *Query Tab*
- *Results Tab*

Query Tab

The **QUERY** tab of a given workbench includes all of the fields that can be used to search for an entity. For example, the Request Type Workbench **QUERY** tab includes fields that are included in a Request Type.
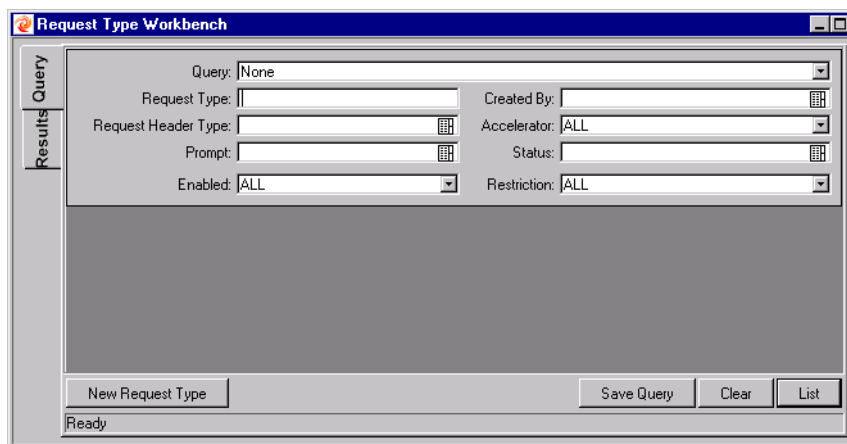

Figure 3-4 Request Query Tab

Each workbench has one field used to query the primary name for the entity. When searching for the name of an entity, the value entered in the field is case insensitive and can be a partial value. For example, entering "test" in the Request Type Name field returns Request Types with names like 'TEST Project' and 'Testing Case Project.'

The **QUERY** tab also accepts a wildcard character ("%") when searching on the entity's name. This matches against any characters. For example, if you want to query all Request Types with "ample" in their name, you could search by "%ample". This query returns Request Types with names like 'Request Type Example' and 'Sample Request Type'.

Some workbenches also have a MAX ROWS field. This field limits the number of rows returned by a query. For example, as shown in *Figure 3-4*, regardless of the total results in the system that match the query parameters, no more than 200 rows will be returned. Decrease the number of maximum rows to yield faster queries.

Advanced Query

To perform an advanced query, click the **ADVANCED** tab on the workbench window. This lets you set up custom lists of inclusions and exclusions in your database search. You can set up new conditions, edit a standing condition, enable, disable, and delete individual parts of your advanced query. A search is first done on the information in the query. Whatever results are processed from the simple query are passed through your advanced query.

Tip	To use only the advanced query, make sure to leave the simple query tab blank.

To create new criteria for an advanced query:

1. Click **NEW**.

2. In the ADVANCED QUERY window, choose a field from the auto-complete field.

3. Select the condition from the CONDITION drop down list and enter a value to use as the benchmark for your search in the VALUE field.

4. Click **ADD** to add this logic to your list of parameters.

   The list of results will run through each logic on your list, and everything that matches ALL of your logic is displayed. If zero matches are constantly being returned, try being less strict by disabling or removing some of the criteria.

Descriptions of the Boolean operators available in the CONDITION drop down list are shown below.

- **LIKE** looks for close matches of your value to the contents of the selected field.

- **NOT LIKE** looks for contents in the selected field that are not close matches to your value field.

- **EQUAL TO** looks for an exact match of your value to the contents of the selected field.

- **NOT EQUAL TO** will return all results that are not an exact match of your value to the contents of the selected field.

- **IS NULL** will return all instances in which the selected field is blank.

- **IS NOT NULL** will return all instances in which the selected field is not blank.

- **GREATER THAN** looks for a numerical value in excess of the value entered in the Value field.

- **LESS THAN** looks for a numerical value below the value entered in the Value field.

- **GREATER THAN EQUAL TO** looks for a numerical value in excess or the same as the value entered in the Value field.

- **LESS THAN EQUAL TO** looks for a numerical value below or the same as the value entered in the Value field.

Results Tab

The **RESULTS** tab is automatically displayed when a query is submitted by clicking **LIST**. The **RESULTS** tab displays all of the records that match the query criteria, along with key data fields for each entity. The results can be sorted on any of the fields by clicking the column header. In the **RESULTS** tab, you can select any of the returned records (or a range of records) for viewing, copying or modifying.

From the **RESULTS** tab, the user can proceed to view detailed information on the desired entity (for example, Request Header Type). Select the result and click **OPEN** to proceed to that entity's detail window. Click on a record to select it, or use Ctrl-click (press Ctrl while clicking the mouse) to select multiple distinct records. You can also use Shift-click (press Shift key while clicking the mouse) to select a range of records.

The **RESULTS** tab also provides buttons for executing other common Kintana tasks. From the **RESULTS** tab, users can also create **NEW** records, **COPY** or **DELETE** existing items, or re-run the query by clicking **REFRESH**. A sample **RESULTS** tab is shown in *Figure 3-5*.
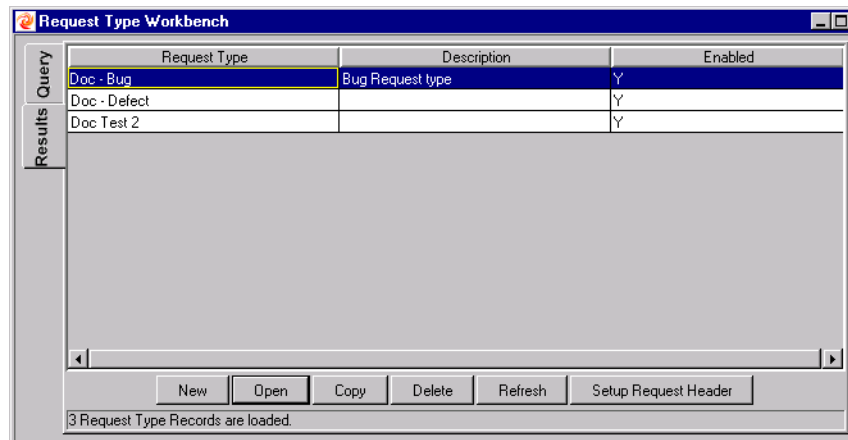
Figure 3-5 Results Tab

Saved Queries

Saved queries provide a quick method for performing standard, reoccurring searches.
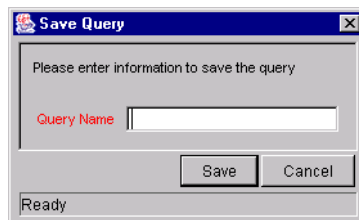
> Example
>
> Each day you query all the Packages that have been assigned in the last day. These query parameters can be saved to avoid entering the same parameters every day.

Saving a Query

To save a search query:

1. Enter the search parameters for your query in the appropriate fields.

2. Click **SAVE QUERY**. The SAVE QUERY window opens.

3. Enter a unique query name and click **SAVE** to save the search parameters.

   Once the query is saved, you can select the saved query name from the QUERY drop down list at any time.

Note | The user that created the saved query is the only user with access to use that saved query.

Using a Saved Query

To use a saved search query:

1. Select the saved query name from the QUERY drop down list.

2. Click **LIST**. The search is run with the saved parameters of your query.

Deleting a Saved Query

To delete a saved query, choose it from the QUERY drop down list and then select **FILE -> DELETE <QUERY NAME>** from the menu.

Entity-Dependent Menus

Certain Kintana entities have extra configuration or processing options that are accessed through their own menus, which appear at the top of the Kintana Workbench. The menu becomes accessible once the entity's screen is selected.

The following sections discuss each entity that has such a menu:

*   *Request Type Menu*

*   *Project Menu*

*   *Package Menu*

*   *Distribution Menu*

*   *Environment Menu*

*   *Notification Templates Menu*

Request Type Menu

The **REQUEST TYPE** menu contains the options described in *Table 3-1*:

Table 3-1. Request Type Menu Options

Option	Description
Request Header Setup	Sets a global default Request Header Type and Workflow for any new Request Types. A newly-created Request Type will associate the Request Header Type specified unless a new one is chosen, and any Requests created from that Request Type will use the Workflow specified, unless a different Workflow is indicated in the Request Type **RULES** tab.
Request Type Category Setup	Opens the Request Type Category Validation, enabling users with the proper access to add new values.

Project Menu

The **PROJECT** menu contains the options described in *Table 3-2*:

Table 3-2. Project Menu Options

Option	Description
Import from Microsoft Project	Begins the process of importing a Project from Microsoft Project.
Export to Microsoft Project	Enabled only when a Project is open, this option begins the process of exporting the open Project to Microsoft Project.
Project History Setup	Opens the Project History Setup window, which sets the attributes of Projects that are captured in Transaction Histories. Settings configured in this window apply to all Projects in Drive.
Copy Project URL	Enabled only when a Project is open, this option copies the URL of the Project in the Kintana interface to the computer's clipboard. The URL opens the Project in the Kintana interface.
Copy Project URL (Workbench)	Enabled only when a Project is open, this option copies the URL of the Project in the Kintana Workbench interface to the computer's clipboard. The URL opens the Project in the Kintana Workbench interface.

Table 3-2. Project Menu Options

Option	Description
Convert Project to Template	Enabled only when a Project is open, this option opens the Convert Project to Template window, which controls the conversion of the open Project to a Template.

Package Menu

The **PACKAGE** menu contains the options described in *Table 3-3*:

Table 3-3. Package Menu Options

Option	Description
Cancel Package Line	Enabled only when a Package Line within a Package is selected, this option cancels a Package Line from processing.
Submit Package	Enabled only when an un-submitted Package is open, this option submits the Package.
New Package Group	Opens the Package and Request Groups Validation, enabling users with the proper access to add new values.
Merge	Enabled only when two or more Packages have been selected from the **RESULTS** tab of the Package Workbench window, this option opens the Merge Package window. This window controls the merging of several Packages into one.

Distribution Menu

Enabled when the Releases screen group has been clicked, the **DISTRIBUTION** menu contains the options described in *Table 3-4*:

Table 3-4. Distribution Menu Options

Option	Description
Cancel Distribution	Enabled only when a Distribution is open from the **DISTRIBUTION** tab of a Release, this option cancels the open Distribution.

Table 3-4. Distribution Menu Options

Option	Description
Submit Distribution	Enabled only when an un-submitted Distribution is open, this option submits the Distribution.

Environment Menu

The **ENVIRONMENT** menu contains the options described in *Table 3-5*:

Table 3-5. Environment Menu Options

Option	Description
Update Base Paths	Opens the Update Base Paths window, which updates all base paths for the open Environments.
Update Password	Opens the Update Environments Password window, which updates all passwords for the open Environment's hosts.

Notification Templates Menu

The **NOTIFICATION TEMPLATES** menu contains the following option:

- **INTERVALS** — Opens the NOTIFICATION INTERVALS window, which allows users to add or modify intervals for the sending of Notifications.

Chapter
4

Workbench Settings

Certain user-specific settings can be configured from the Workbench **EDIT** menu. These settings break down into the following categories, each with its own window:

- *User Profiles*

- *Regional Settings*

- *Server Settings*

User Profiles

The USER PROFILES window configures the way certain Kintana Workbench features function for a particular user. These user profiles are set on a per-user basis. Changes to your user profile will not affect other users' Workbench settings.

Open the USER PROFILES window by selecting **Edit -> User Profiles** from the menu at the top of the Kintana Workbench. The USER PROFILES window has three tabs:

- *User Profiles Window - General Tab*

- *User Profiles Window - Workflow Status Tab*

- *User Profiles Window - Package Tab*

User Profiles Window - General Tab

The **GENERAL** tab of the USER PROFILES window controls common settings for the Kintana Workbench.
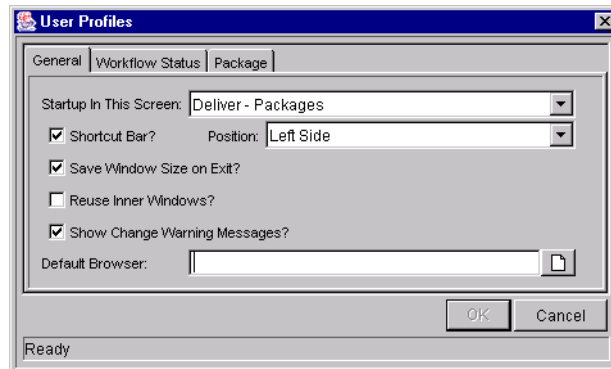
Figure 4-1 User Profiles Window - General Tab

Table 4-1. User Profile Window - General Tab

Fields	Description
STARTUP IN THIS SCREEN	Determines which Kintana Product Suite screen group is the first one you see when you log into the application.
SHORTCUT BAR?	Determines whether or not the shortcut bar is shown. If you do not show it you must navigate between screens using the **NAVIGATE** menu.
POSITION	If the shortcut bar is shown, determines which side of the Kintana Product Suite window it appears on.
SAVE WINDOW SIZE ON EXIT?	Saves the size of the entire Kintana Workbench window when you exit the application. The window retains its size when you log back into the application.
REUSE INNER WINDOWS?	Determines whether or not you can have multiple windows open at once. If this field is unchecked, you can only select and open one detail window for each entity from its workbench.
SHOW CHANGE WARNING MESSAGES?	Determines whether or not you receive warning messages when you are attempting to change the entities (such as Project Templates).
DEFAULT BROWSER	Determines which browser is used to view attachments and URLs.

User Profiles Window - Workflow Status Tab

The **WORKFLOW STATUS** tab of the USER PROFILES window controls settings for the display of Workflows based on the status of their steps.
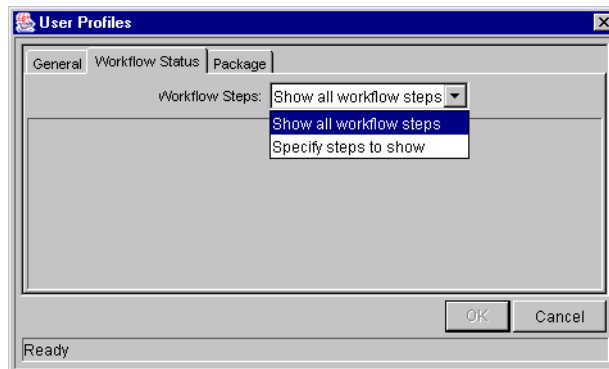
Figure 4-2 User Profiles Window - Workflow Status Tab

When **SHOW ALL WORKFLOW STEPS** is selected in the Workflow Steps drop down list, no options are available.

When **SPECIFY STEPS TO SHOW** is selected, you can choose whether to show traversed steps, and also whether to hide immediate and condition steps that are not in progress.

User Profiles Window - Package Tab

The **PACKAGE** tab of the USER PROFILES window controls settings for the display of cancelled Package Lines.
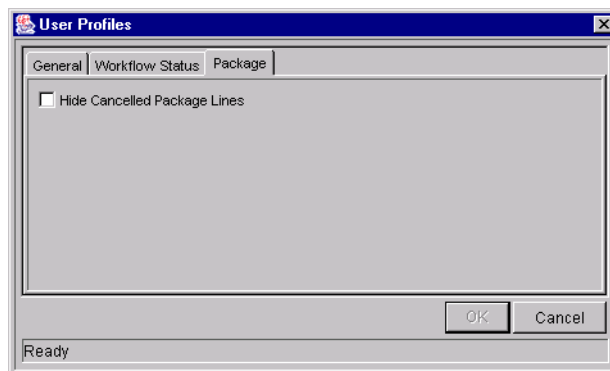
Figure 4-3 User Profiles Window - Package Tab

To hide cancelled Package Lines, check the HIDE CANCELLED PACKAGE LINES box.

Regional Settings

Users can modify the display of dates, times, and numbers in the Kintana Workbench using the REGIONAL SETTINGS window, which is opened by selecting **EDIT -> REGIONAL SETTINGS.**

Each user's computer operating system has a locale setting that specifies the user's language and country. Kintana reads this setting and displays dates, times, and numbers according to the region's customary format. For example, in Germany dates are displayed in day-month-year format with periods as separators (18.4.2001). In the United States, dates are displayed in month-day-year format with backslashes as separators (4/18/01).

To use a Date and Time format other than the one defaulted by the computer's operating system, users can change it by selecting **EDIT -> REGIONAL SETTINGS** in the Kintana Workbench. The USER REGIONAL SETTINGS window opens.

All dates, times, and numbers are set to display using the default settings for the user's locale. To set their own preferences, users must first deselect the USE DEFAULT SETTING? check box to enable the fields on the **DATE**, **TIME** and **NUMBER** tabs.
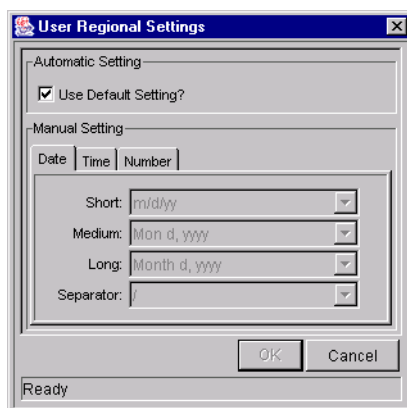
Figure 4-4 User Regional Settings Window

| Note | Users must logout of Kintana Workbench and then logon again for the new settings to take effect. |

The user can modify the display of data using the following tabs:

- **DATE** - The **DATE** tab allows users to set the display of dates to short, medium and long format. Examples of the Date formats are shown below.

    o   Short - m/d/yy

    o   Medium - dd-Mon-yy

    o   Long - Month d, yyyy

Users can also specify the characters used to separate days, months, and years. Formats and delimiters are updateable through drop down lists.

- **TIME** - The **TIME** tab allows users to set the display of times in either 12 or 24-hour format. User can also specify AM and PM symbols and the character used to separate hours, minutes, and seconds. Format, symbols, and delimiters are updateable through drop down lists.

- **NUMBER** - The **NUMBER** tab allows users to configure which characters are used to denote decimals (either a period or a comma). Users can also define the grouping of digits, the symbol used to group them, and the sign used to mark percentages. Decimal markers, digit groupings and symbols, and percentage signs are updateable through drop down lists.

Click **OK** to save any settings for date, time, and number display. These settings are saved in each user's personal profile, and are not editable by any other user.

Server Settings

The Server Settings configure how much information is logged by the Kintana server while you are running the application. This log information is used to analyze performance issues and gather information while the application is in use.

Note	In general, you should not change any of these settings unless you are specifically asked to do so by the Kintana System Administrator at your site.
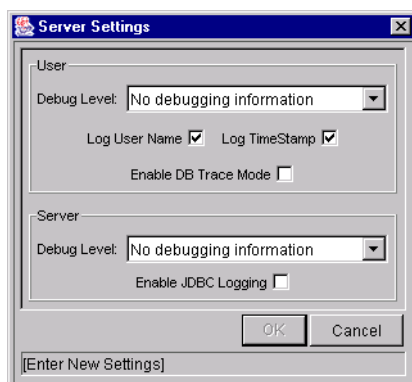
Figure 4-5 Server Settings Window

Appendix

A

Field Formats

The Kintana Workbench interface features a number of standard interface components. These components are discussed in the following sections:

* *Text Areas/Text Fields*

* *Auto-Complete Lists*

* *Drop Down List*

* *Check Boxes*

* *Radio Buttons*

* *Dates*

* *Arrows*

* *Lists*

> Note
>
> The field labels for required fields are always marked with a red asterisk.

For detailed information on altering the look and feel of these fields, consult the Validations appendix in *"Configuring a Request Resolution System"* or *"Configuring a Deployment System in Kintana"*.

Text Areas/Text Fields

Text areas and text fields are generic entry fields. Text fields are displayed on a single line, while text areas are displayed on multiple lines using a scroll bar if necessary. Text fields can be pre-configured to only accept certain types of data, such as pure text or numbers. You cannot type a non-conforming value

into a text field or text area. For example, if you try to type the letter 'A' into a numeric field, the character is not accepted.

Creation Action Name: [ ]

Figure A-1 Text Area

Auto-Complete Lists

Auto-complete lists are used for fields that must be validated against a list of pre-defined values. When you type a partial value into an auto-complete field (as shown in *Figure A-2*) and press the tab key, an auto-complete list opens. The auto-complete list (as shown in *Figure A-3*) shows all of the pre-defined values that match the partial value. You can also access the auto-complete list by clicking on the icon located in the field.

Request Header Type: [   ] 📇

Figure A-2 Auto-Complete Field
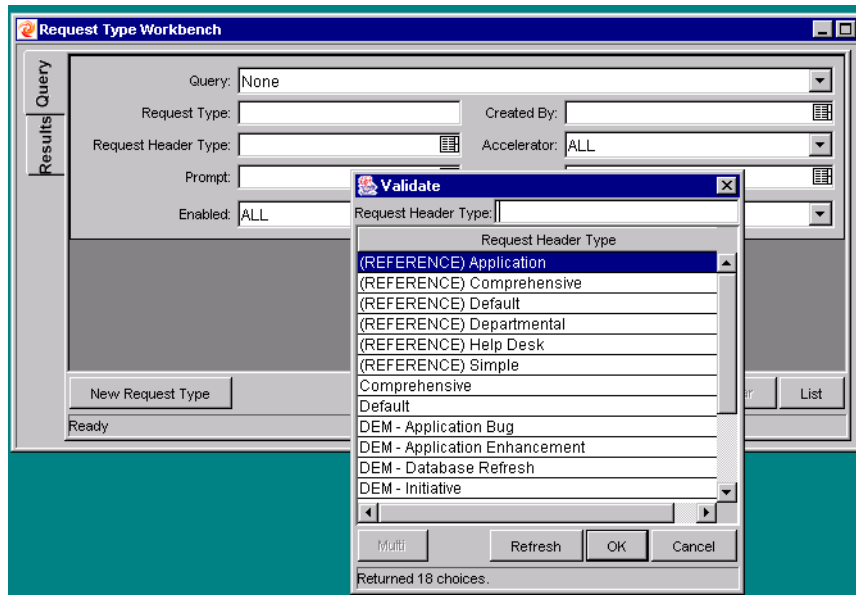
Figure A-3 Auto-Complete List

For example, if you type "m" into the Assigned To field in the Request screen, a list of all the users whose username starts with "m" appears. If the partial value you enter matches exactly one value from the list, the list value is

automatically entered in the field. If no values match the partial value you entered, the full list is returned.

| Note | If no value is typed into the auto-complete field and you try to tab out of the field, the auto-complete dialog will not open, even if the field is required. If you try to navigate out of the field using the mouse, the field will not be validated. If you leave the field without using the tab key, the field will be validated when you try to save your changes. |

If you want to see the full list of values that are not limited by a partial value, you can either type "%" into the field and press the **Tab** key, or you can click on the auto-complete icon on the right side of the field. In either case, the auto-complete dialog opens showing the full list of possible values.

The auto-complete component can be configured to provide a warning when the number of rows returned from a search will exceed a certain amount. For example, assume that you have 2000 entries in a CONTACT auto-complete list. When you click on the CONTACT auto-complete list (without limiting the search), Kintana displays a warning message:

You can then either:

- Click **YES** to load all of the rows into the auto-complete list.

- Click **NO** to abort the auto-complete search.

Multi-Select Auto-Complete List

Some auto-complete lists can be configured to hold multiple values. This functionality is enabled through the multi-choice auto-complete list component. When the auto-complete's Validate window opens, it displays an adjacent selection window. This is shown in *Figure A-4*.
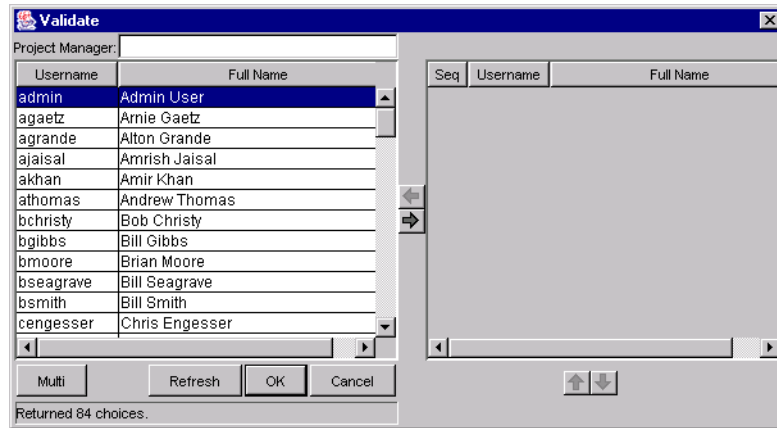
Figure A-4 Multi-Choice Auto-Complete List

Clicking the **MULTI** button closes the selection window, as shown in *Figure A-5*.
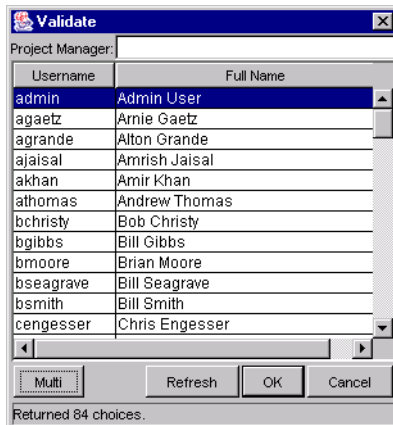
Figure A-5 Validate Window with secondary window closed

To include more than one item in a single field, use one of the following methods:

- Type the values directly into the auto-complete field with a semi-colon to separate the entries. An example is shown below.
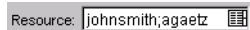
- Open the auto-complete's Validate window. You can specify multiple entities in the adjacent selection window.
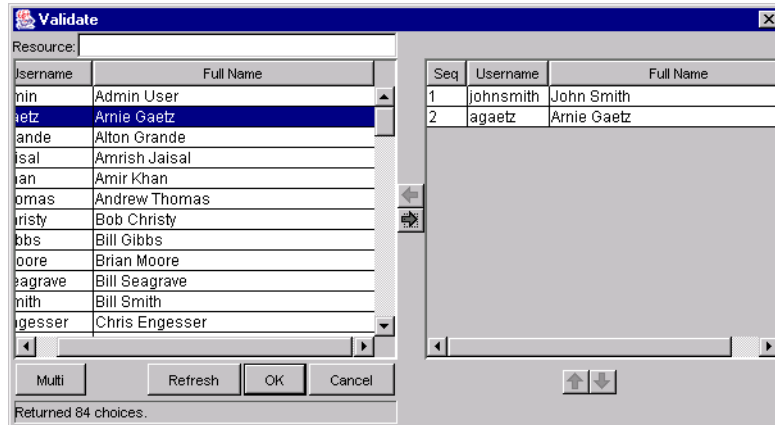
Select the desired entity and click the **RIGHT** arrow button to move the entity to the selection window. Repeat the process to add additional entities. To remove an entity from the selection window, select that entity and click the **LEFT** arrow button. Move multiple entities by using Shift + click for adjacent entities or Ctrl + click for non-adjacent entities.

Move an item up or down in the selection window by selecting the entity and clicking the **UP** or **DOWN** arrows.

Click **OK** to accept the multiple selections. This closes the Validate window and the selected entities appear in a semi-colon delimited list in the field for which the multi-choice auto-complete list was used.

> **Note**
>
> If the right-hand selection window is closed, you can select multiple items directly. (You can also close this window by clicking **MULTI**.) Simply select the items in the list and click **OK**.

The Validate window closes and all of the selected items appear in the auto-complete field.
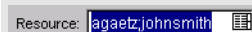
Drop Down List

Drop down lists feature a pull-down list of valid values. Fields are selected by clicking on the field and using the mouse to make your choice. You can also tab into the field and use the up and down arrow keys, or you can tab into the field and type the first letter of the targeted choice.
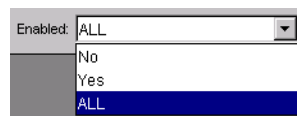
Figure A-6 Drop Down List

Check Boxes

Check boxes are used for fields where there are only two choices, such as On and Off. To indicate On, click on the box beside the label and a check appears in the box. To indicate Off, the check box next to the label should be empty.

s field is: ☑ Visible to all users

Figure A-7 Check Box

Radio Buttons

Radio buttons are used for fields where there are two or more choices. Selecting one option disables the other associated options. For example, clicking **YES** in a Yes/No radio button pair disables the No option. To select a choice, click the button to the left of the appropriate choice.

Transaction History: ○ Yes   ● No

Figure A-8 Radio Buttons

Dates

The date field is used to enter dates and time in any valid format. Kintana automatically converts these dates into a standard format for the field. An example of a standard format is "March 15, 2001."

Example valid date formats for "March 15, 2001" are:

- 3/15/2001

- 15-Mar-2001

- March 15, 2001 3:15 PM
  (For a date with an associated time of 3:15)

- Valid date formats depend on the user's locale. See *"Regional Settings"* on page 46 for more detailed information.

Start Date From: [   ] [icon]
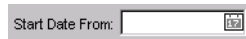
Figure A-9 Date Field

Note	Date fields must be entered using a valid date (time) format. If a user enters an invalid date format, a message appears showing sample valid date entries in order to assist the user. If the field also accepts time entries and an invalid format is entered, a message appears showing sample valid date and time entries.

Clicking the date field calendar icon will open a date selection window which allows the user to populate the date field by selecting a date from a calendar. The date selection window shows dates, time, or both, depending on the source of the field.
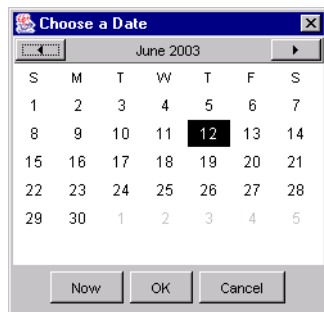
Figure A-10 Date Selection Window

Display of dates, times, and numbers can be altered. See *"Regional Settings"* on page 46 for more detailed information.

Arrows

Arrows are used to move an item from an unlinked (inactive) state to a linked (active) state. *Figure A-11* displays arrows that can be used to move items to a linked state.
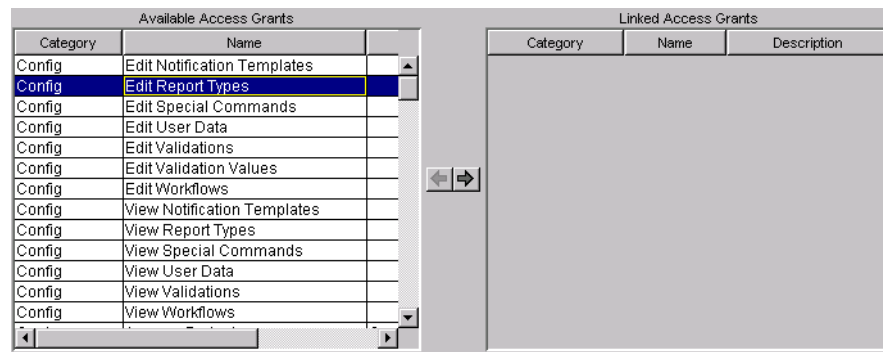
Figure A-11 Link Arrows

Lists

Lists are used throughout Kintana to display multiple records with multiple items. A sample list is shown in *Figure A-12*.

Figure A-12 Sample Multi-Column List

Click on a column heading to sort the list by the column heading. Resize columns by centering the cursor on the lines between adjoining headings. When the cursor changes to a double headed arrow, click and drag the bar to the required position. To switch the columns, hold down the mouse button on a column header and drag it to the desired location. Any changes you make to the list are temporary and revert to the default format the next time you log into Kintana.

Index

W

Workbench
    browser considerations 3
Workbench Settings 43
Workflow Status Tab 44