KINTANA™

PMO Configuration Guide

Version 5.0.0

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Chapter 1
Introduction

The Kintana Program Management Office Solution provides organizations with a single location from which Program Managers can initiate, operate, and manage their portfolio of programs and projects.

Organizations implement a Program Management Office in order to:

- Ensure alignment of IT projects with business objectives
- Eliminate duplicate and non-priority efforts
- Improve operational efficiency
- Leverage resources
- Ensure on-time and on-budget delivery

To ensure these business requirements are met, Kintana provides a full project lifecycle solution. Starting with new project or program requests, Kintana enforces systematic capturing of all relevant functional specifications and priorities. Appropriate business user approvals based on project scope, budget level, and other business rules are built in. Once approved, the Program provides a single point for visibility and control over relevant projects and requests.

Who should read this guide

This document provides instructions for configuring Kintana to enable the successful management of programs and projects in your company.

This Kintana Solution Configuration guide is used primarily by:

- Business or technical users who configure and maintain processes related to program management.

- Request Type configuration experts.
- Workflow configuration experts.

You must have the following licenses to view the configuration screens and pages discussed in this document:

- Program Management Standard
- Create Power

Additionally, the following access grants are needed to configure demand management-related entities in Kintana:

- Create - Edit Request Types
- Config - Edit User Data
- Config - Edit Workflow

How to use this guide

This document provides background information and details for configuring Kintana's Program Management Office Solution at your site. Navigate to the desired topic using the Table of Contents or use the Index to find information related to key words.

If viewing this guide online, you can use the Kintana Library page's search functionality to quickly locate desired topics in this and other Kintana publications.

What this guide is NOT

This configuration guide is not meant to provide end-user instructions for managing Programs. For detailed information on capturing, analyzing and managing Programs using Kintana, refer to the *"PMO User Guide"*, accessible from the Kintana Library.

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.

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

Installing the Kintana Program Management Office Solution

The process for installing the Kintana Program Management Office Solution follows the standard Kintana patch process. For new Kintana customers, this process should be employed after the successful Kintana installation.

The patch will take between 30-40 minutes (depending on your machine speed) and will follow the basic timeline:

- Stop the Kintana server and start the patch process
- 10 minutes
- The patch process will prompt you to start the server
- 20-30 minutes
- Patch completes

This version of the Program Management Office must be installed on top of Kintana 5.0. Upgrade to version 5.0 before running this installation.

For more detailed information regarding the installation of the Kintana Program Management Office Solution, see the following sections:

- *Patch Directions*
- *New server.conf Parameters*

Patch Directions

1. Download kintana-500-PMO.jar. Place the .jar file in the <Kintana_Home> directory.
2. Stop the Kintana server.
3. cd $KINTANA_HOME/bin
4. Run the command: **`sh kPatch.sh -i PMO`**
5. Follow the instructions shown on the screen. The user is prompted for the following information:
   - knta schema password
   - knta logon username
   - knta logon password

   The username and password provided must be for a user with the SYS ADMIN: MIGRATE KINTANA OBJECTS Access grant. Without this grant, PMO content (portlets, Workflows, Request Types) will not be migrated.

During the install, you must start the server without exiting kPatch.sh. If you are installing the patch on a Unix box, open a new shell session to run $KINTANA_HOM/bin/kStart.sh.

6. When the installation is completed, bounce the Kintana server.

Ignore any “continue” warnings at the beginning of the patch process.

Rebuilding Statistics for the Cost-Based Optimizer

To improve the performance of the Kintana instance, the installation will rebuild statistics for the cost-based optimizer for versions 8.1.6 and higher. In order to do this, the following privileges must be granted to the Kintana schema as SYS (or on 9i, SYSTEM as sysdba).

```
grant select on v_$parameter to <KINTANA_SCHEMA>
```

```
grant execute on dbms_stats to <KINTANA_SCHEMA>
```

If the privileges are not granted, the performance of the PMO Solution will be adversely affected.

New server.conf Parameters

The Kintana Program Management Office Solution introduces two new parameters to the server.conf file. Both parameters relate to the calculation of Program Summary Condition Indicators:

- **ENABLE_PROGRAM_SUMMARY_CONDITION_ENGINE** — (True/False) Turns the calculation of Program Summary Condition Indicators on or off. Should always be left on. Default value: True.
- **PROGRAM_SUMMARY_CONDITION_INTERVAL** — (Numerical values, in seconds) Sets the interval for the calculation of Program Summary Condition Indicators. Default value: 3600.

These parameters are inserted into the server.conf file and set to their default values automatically during the install process. To modify these parameters, run kConfig.sh as you would normally to edit the server.conf file.

Chapter 3

Key Concepts and Definitions

The following sections define the common concepts and terms related to configuring your Kintana Program Management Office Solution. Knowledge of these terms will help the reader gain a more thorough understanding of Kintana Program Management Office usage and configuration techniques.

The following topics are discussed:

- *Program*
- *Program Management*
- *Business Objective*
- *Issue*
- *Scope Change*
- *Risk*
- *Resource Request*
- *Field Group*
- *Dashboard Template*
- *Menu Security*

Program

A Program is a collection of Projects and associated Scope Changes, Risks, Issues, and Resource Requests. Programs feature full drill-down into Projects and Requests, as well as roll-up of relevant data from Projects and Requests.

Much like Projects, Programs have associated Summary Conditions and configurable Exception indicators.

A Program can be created to oversee the upgrade of Company A's Customer Service computer system for better integration with the Sales force. Projects are created by the Customer Service, Sales, and IT managers. Each Resource handles their own aspect of the work, and are linked and monitored by the Program. At the same time, Risks and Scope Changes submitted against the Program are tracked and followed up on.

Program Management

The Program Management Office Solution allows a Program Manager to deliver a new business capability or solve a problem using Programs. Using Programs, a Program Manager can do the following:

- Oversee related IT projects
- Coordinate inter-project deliverables and milestones
- Manage scope change
- Identify and mitigate risks
- Resolve inter-project issues
- Manage the allocation of resources

Business Objective

Business Objectives are a set of business goals that can be prioritized and tied to Programs. Business Objectives can be created, modified, and deleted independently of Programs. Business Objectives that have already been linked to Programs cannot be deleted.

Company A creates a Business Objective, "Reduce order to delivery time." This Objective is assigned a priority and associated with the Program created to upgrade Company A's Customer Service system.

Issue

Issues introduce a framework for all Project and Program-related issues to be identified and resolved. Issues can span multiple Request Types, enabling a finer level of visibility over the resolution process.

Bugs and Enhancements can both be Issues. Each Request Type will be processed along its own Workflow, though they may share common fields for tracking purposes.

Scope Change

Scope Changes provide a way to ensure that the scope of a Program and its individual Projects stay manageable. Submitted Scope Change Requests can be assessed before being rejected or incorporated into Program or Project scope. Program and Project scope can be controlled by ensuring that possible changes are clearly identified, aligned, and processed.

Risk

Risks supply a way to log and resolve risks that threaten a Program. The process of gathering information about possible risks — including impacts and probability of occurring — is streamlined. Program Summary Condition Indicators can be configured to alert users to varying levels of risk.

Company A’s Program Manager configures the Customer Service upgrade Program to show a red indicator if more than two Risks with Impact Level 1 and Probability High are created.

Resource Request

Resource Requests allow a Program Manager to more easily and quickly request and approve resources, as well as maintain visibility over resource needs and allocations.

Field Group

Field Groups are a set of fields that are delivered by Kintana to enable a quick solution implementation or to enable certain functions in Kintana. For example, Program Management Office delivers a PMO Program Issue field group to enable consistent tracking of information for Program Issues. This field group is associated with a Request Type (through the Request Header Type) to enable the basic PMO Issue Management features in Kintana such as Escalation Level.

For Program Management Office, each Program Management Office Request Type must be linked to its respective Field Group.

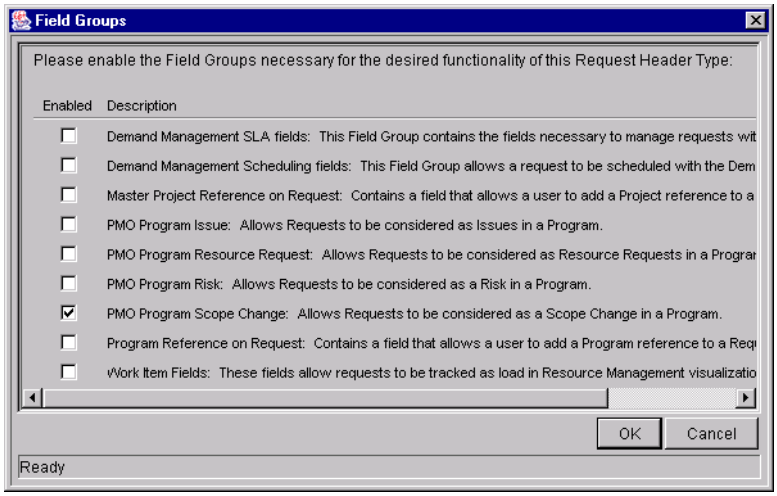


Figure 3-1 Field Groups Window on the Request Header Type Workbench

Dashboard Template

Users can import templates into their Kintana Dashboard. These templates are added as a new page (tab) on your Dashboard. Each template can consist of one or more Dashboard pages. Once imported, the user can personalize the pages to suit his specific business needs; for example, add, delete or personalize portlets.

Advance Kintana configuration experts can modify templates or create custom templates to be imported. For more information on working with templates, see *"Customizing the Kintana Interface"*.

Menu Security

Each user must have a Program Management Office Standard License to access the Program Management Office menus. Additionally, users must be given the following additional access grant to be able to access the Program Manager menus.

- PMO - Manage Programs
- PMO - Edit Programs
- PMO - View Programs

The Program Management Office menus are defined XML files. Advanced users can customize these menus to provide alternate navigation, additional menu items, and alternate menu security. See *"Customizing Templates and Menus"* on page 27 for additional details.

Chapter 4

Configuring the Program Management Office Solution

Though Program Management Office Solution contains pre-configured Request Types and Workflows for all Program Management entities, you may wish to configure your own Request Types for use in conjunction with the Program Management Office.

The following sections discuss configuring your Request Types for use with the Program Management Office Solution:

- *"Program Management Office Request Type Configuration Overview"* on page 19
- *"Configuring Program Management Office Request Types"* on page 20
- *"Included Workflows"* on page 23
- *"Customizing Menus and Templates"* on page 25

Program Management Office Request Type Configuration Overview

This section provides an overview of configuring pre-existing Request Types for use with the Program Management Office.

The Program Management Office Solution contains pre-configured Request Types and Workflows for all Program Management Office entities:

- Issues
- Risks
- Scope Changes

- Resource Requests
- Program Requests

The pre-configured Request Types and Workflows are ready to be used upon installation. However, if you have pre-existing Request Types that you would like to use in place of or in addition to the pre-configured Request Types, your Request Types will need to have standard fields added in order to maintain Summary Condition calculations.

Configuring Program Management Office Request Types

The Program Management Office Solution contains pre-configured Request Types and Workflows for all Program Management Office entities:

- Issues
- Risks
- Scope Changes
- Resource Requests
- Program Requests

The first four Request Types can be modified to meet the needs of your organization.

You may have a pre-existing “Bug” Request Type that you would like to use as a Program Issue.

The general process for modifying a Request Type is as follows:

1. Determine the Program Management Office Request Type to which your Request Type will be changed or added.

2. The Program Management Office Request Types require Field Groups to function. These Field Groups are linked to Request Types through the associated Request Header Type. Program Management Office Field Groups are listed in *Table 4-1*.

Table 4-1. Program Management Office Request Type Field Groups

PMO Request Type	Field Group
PMO - Issue	PMO Program Issue
PMO - Risk	PMO Program Risk
PMO - Scope Change Request	PMO Program Scope Change
PMO - Resource Request	PMO Program Resource Request

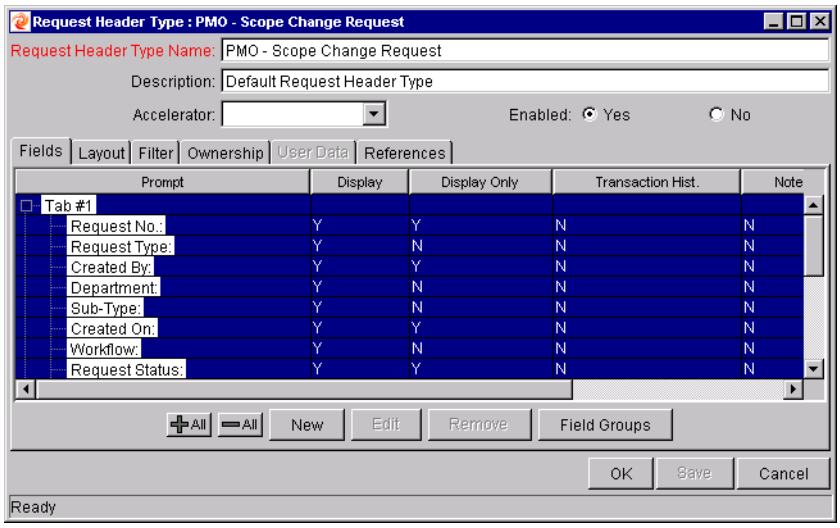
Associate the proper Field Group with the desired Request Type. See *Adding Program Management Office Field Groups to a Request Type* for more detailed information.

Once these steps are completed, the Program Management Office Solution should function with your Request Type in place of or alongside the default pre-configured Request Type.

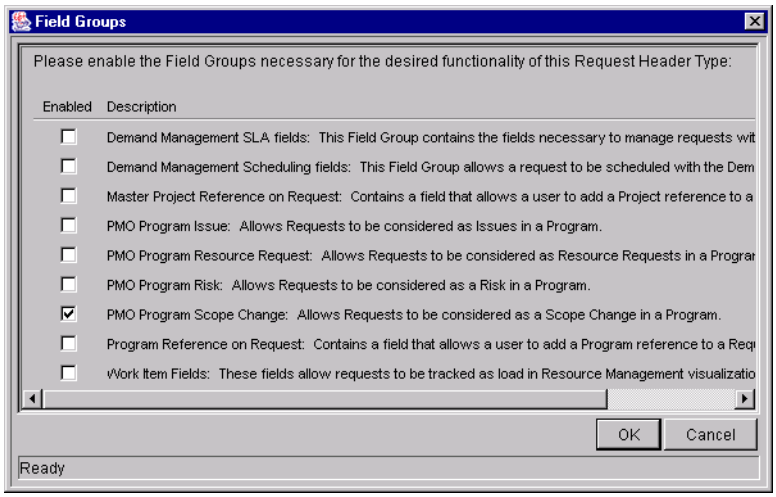
There is also a Request Type for a Program Request. This Request Type (PMO - Program Request) can be modified.

Adding Program Management Office Field Groups to a Request Type

1. Select or create a Request Type.
2. Open the REQUEST TYPE window.
3. Click **OPEN** under the REQUEST HEADER TYPE field. The specified REQUEST HEADER TYPE window opens.

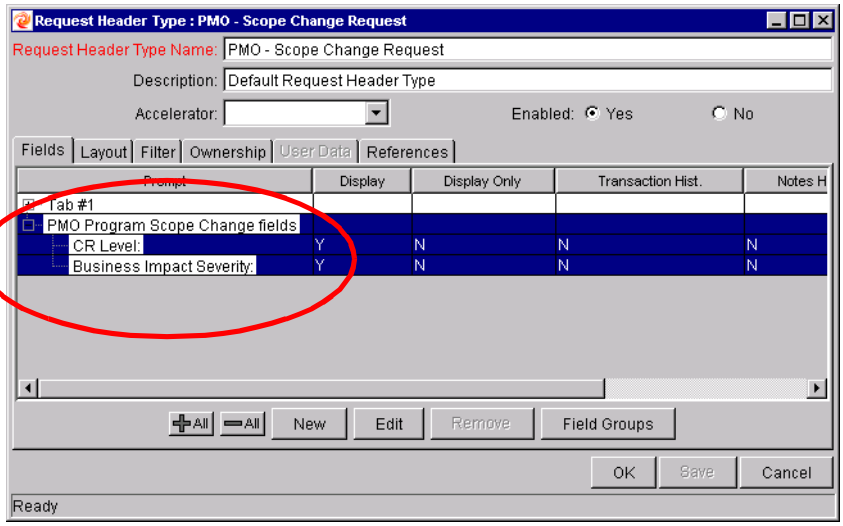


4. Click **FIELD GROUPS**. The FIELD GROUPS window opens.



5. Select the Program Management Office Field Groups to attach to your Request Header Type.

6. Click **OK**. The selected field groups appear on the Request Header Type.



7. Save the Request Header Type and the Request Type.

Note

When Field Groups are associated with existing Request Types (through the Request Header Type definition), tables in the Kintana database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Kintana Database. Instructions for this are included in the Kintana System Administration Guide. Contact your System Administrator for help with this procedure.

Included Workflows

The following sections discuss the Workflows contained in the Program Management Office Solution:

- *PMO - Issue Management Workflow*
- *PMO - Risk Management Workflow*
- *PMO - Resource Request Workflow*
- *PMO - Scope Change Request Workflow*

PMO - Issue Management Workflow

Figure 4-1 illustrates the Issue Management Workflow for the Program Management Office Solution.

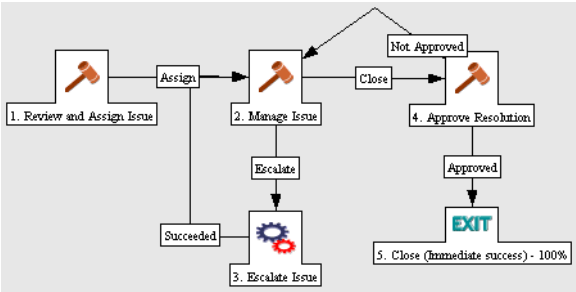


Figure 4-1 Issue Management Workflow

PMO - Risk Management Workflow

Figure 4-2 illustrates the Risk Management Workflow for the Program Management Office Solution.

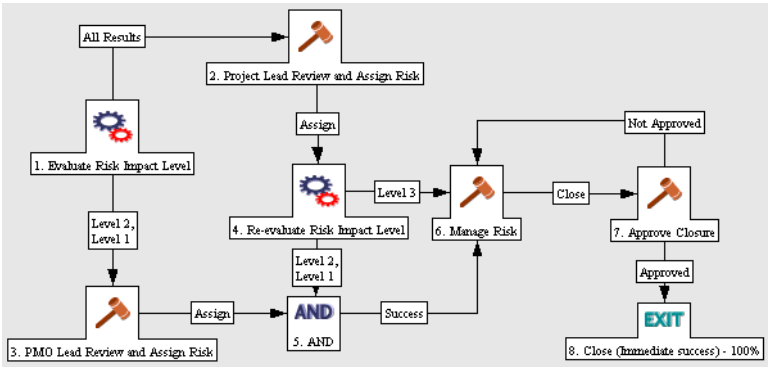


Figure 4-2 Risk Management Workflow

PMO - Resource Request Workflow

Figure 4-3 illustrates the Resource Request Workflow for the Program Management Office Solution.

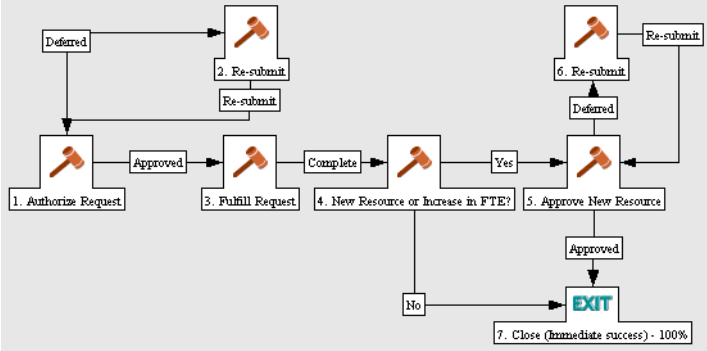


Figure 4-3 Resource Request Workflow

PMO - Scope Change Request Workflow

Figure 4-4 illustrates the Scope Change Request Workflow for the Program Management Office Solution.

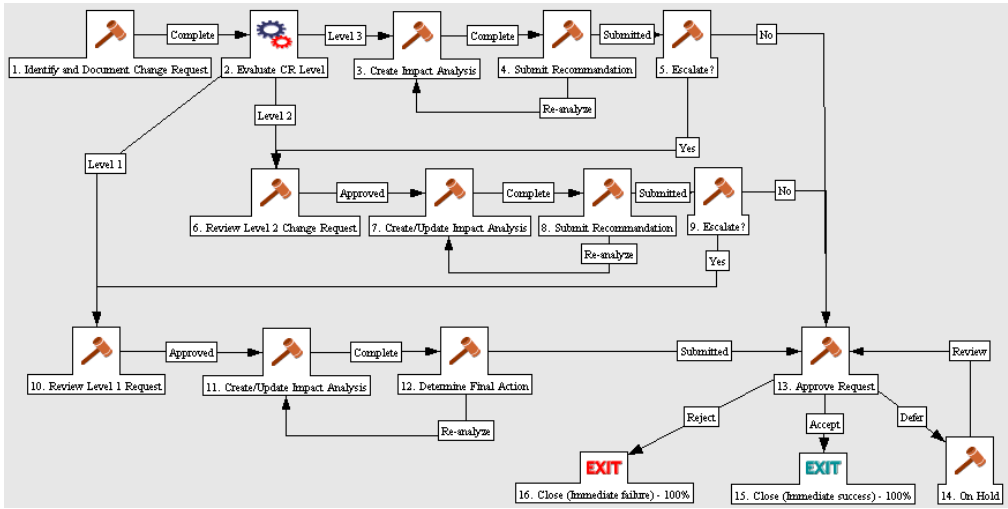


Figure 4-4 Scope Change Request Workflow

Customizing Menus and Templates

Kintana's templates and menus are delivered as xml files on the Kintana file system. Users can customize templates and menus by creating new files or altering existing xml files. See *"Customizing the Kintana Interface"* for a description of the main elements of the template and menu files and instructions for modifying them.

Appendix A
Upgrade Notes

This appendix discusses the notable upgrade impacts when upgrading from a pre-5.0 version of Kintana Program Management Office. The following topics are discussed:

- *Validations Renamed*
- *Portlets Renamed*
- *Program Manager Template Upgrade*
- *Request Type Rules Altered*
- *Upgrade Layout vs. Fresh Install Layout*

Validations Renamed

The following PMO Validations have been renamed:

Table 4-2. Renamed PMO Validations

New Validation Name	Old Validation Name
PMO - Program Projects	(OLD) PMO - Program Projects
Numeric Text Field (length = 4)	(OLD) Numeric Text Field (length = 4)
PMO - CR Level	(OLD) PMO - CR Level
PMO - Issue Escalation Level	(OLD) PMO - Issue Escalation Level

The renaming should not have an effect on your installation of the 5.0 Program Management Office Solution.

Portlets Renamed

The following PMO portlets have been renamed:

Table 4-3. Renamed PMO Portlets

New Portlet Name	Old Portlet Name
Program List	(OLD) Program List
Program Project List	(OLD) Program Project List
Program Issue List	(OLD) Program Issue List
Program Resource List	(OLD) Program Resource List
Program Risk List	(OLD) Program Risk List
Program Scope Change List	(OLD) Program Scope Change List
Resource Assignments	(OLD) Resource Assignments

The renaming may have an effect on your existing portlets. If you see a "Misconfigured SQL" error appearing in a PMO portlet, delete it and re-add the portlet to your Dashboard.

Program Manager Template Upgrade

After upgrading from PMO 4.6 to PMO 5.0, your **PROGRAM MANAGER** template will be empty (the Dashboard page have no portlets).

- You can re-add the missing portlets to the Dashboard page as usual, or
- Delete the blank Dashboard page and re-import the **PROGRAM MANAGER** template from the PERSONALIZE: DASHBOARD page as usual.

Request Type Rules Altered

The seeded PMO Request Types contain Request Type Rules that will need to be manually updated after upgrading to PMO 5.0. These Rules govern the defaulting of PMO Workflows and are simple to update.

Upgrade Layout vs. Fresh Install Layout

The layout of PMO Request Types is different, depending on whether you have upgraded from PMO 4.6 or are performing a fresh install of PMO 5.0. In either case, feel free to alter the layout of your PMO Request Types as always.

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