

KINTANA™

Upgrade Guide

Version 5.0

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Chapter 1 Preface

The Kintana Upgrade Guide is written for the individuals responsible for the installation, upgrade, and maintenance of the Kintana Application. This manual contains information on the following topics related to upgrading a Kintana instance:

- *New Features*
Defines the major functional enhancements across the product suite.
- *Upgrade Impacts*
Defines any required or suggested changes to your current Kintana configurations or settings resulting from Kintana enhancements. This section also discusses any architectural changes made to Kintana during the 5.0 release and highlights any potential impacts to your existing Kintana configurations or data. Kintana administrators and configurers should read this section before proceeding with the upgrade.
- *Upgrade Process*
Details the specific steps required to upgrade a Kintana instance to release 5.0. This process considers all products within the Kintana product suite.



Note

It is critical for each Kintana Administrator to thoroughly familiarize themselves with the changes noted in this manual.

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 administering 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 New Features

Kintana created the first enterprise application for IT – a self-funding software solution that defines, enforces, and automates the processes that IT and the business use to work together. In release 5.0, Kintana has focused on key aspects of IT governance.

This chapter summarizes the major features of this release, which include:

- *Resource Management*
Provides visibility into resource budgets, capacity, and utilization across the organization.
- *Project and Program Cost Management*
Adds standard cost metrics, earned value analysis, and budgeting capabilities to Project, Program, and Portfolio Management.
- *Enhanced Project Management Features*
Provides greater power in managing projects including a new project Gantt chart.
- *Enhanced Request - Package Integration*
Allows greater flexibility in references between Requests and Packages.
- *Field Level Security*
Provides additional granularity to security around Kintana data.
- *Navigation and Functional Enhancements*
Based on comprehensive usability studies, these enhancements add to the usability of the Kintana product suite.
- *Updates to Kintana Solutions*
Makes Kintana Solutions easier to implement, configure and use.
- *Kintana Accelerator Updates*
Adds more power to deployment and development process capabilities.



Customers upgrading to Kintana version 5.0 will follow a different upgrade path depending on their current Kintana version:

Current Version	Through Version	Final
Kintana 3.x (or earlier) **	-----> 4.0	-----> 5.0
Kintana 4.0	----->	-----> 5.0
Kintana 4.5	----->	-----> 5.0
Kintana 4.6	----->	-----> 5.0

This chapter only discusses the new features introduced in Kintana 5.0. Refer to the Kintana 4.5 and 4.6 upgrade guides for a list of features introduced in those releases.

For more detailed information on how to use any of the following functionality, refer to the associated Kintana document.

Resource Management

Kintana's enhanced Resource Management functionality provides managers with the information they need to optimize resource allocations across strategic and tactical activities. From high-level resource planning of Programs and Projects to detailed assignments of Tasks and Requests, managers now have real-time visibility into resource skills, assignments, available capacity, and utilization. Resource attributes such as organization groups and skill sets, help managers quickly find the right people to assign to new work and resolve resource conflicts.

Large IT organizations typically struggle with different sets of needs:

- They must look at resource availability both for high-level planning (typically at the skill level) and detailed project assignment (at the individual level).
- They need to perform resource management across groups that may or may not maintain detailed records on individual skills and availability.

A typical scenario is the yearly planning process. Prior to Kintana, the CIO's direct reports spent weeks compiling reports on past utilization and projected future needs. Kintana supports this by providing a Dashboard with real-time

visibility and comparison charts of budgeted resource usage vs. requested resource usage, as well as actual resource assignments and historical utilization across time periods. This information is critical when planning capacity and headcount at periodic planning meetings.

At a more granular level, a project manager needs to assign a ten day Task with a fixed start date to a Java Developer. New resource attributes allow the project manager to quickly find resources with a skill set of “Java Developer” and availability for the specific time period. Once assigned, the Java Developer’s personal Gantt chart reflects the changes to availability and the new Task automatically shows up on his Dashboard.

Figure 2-1 shows the Analyze Assignment Load page where you can view selected Resource allocations and load using a number of filters and display options.

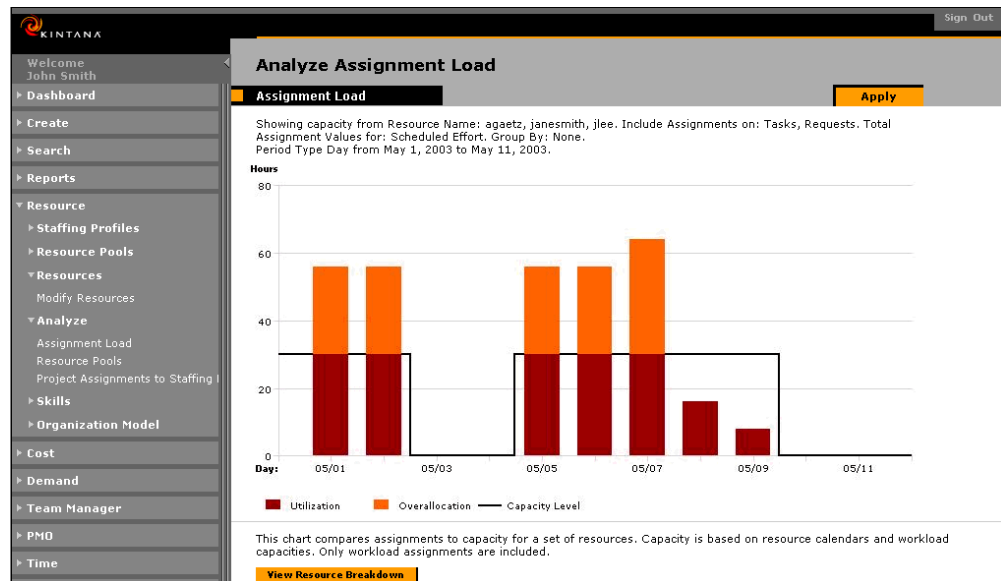


Figure 2-1 Resource Management Feature - Analyze Assignment Load Page

See the following Kintana documents for additional details on using this and other Resource Management functionality:

- ["Managing Resources in Kintana"](#)
- ["Working with Projects"](#)

Skills Database

Resources include skill attributes and skill proficiencies that allow more efficient high level planning or detailed scheduling of Projects and Requests. At a high level, IT leadership now has visibility to capacity and past utilization rates broken down by skill set. This is a tremendous help in annual planning when trying to determine the right resource mix for the organization. At the detail level, project managers can search for resources based on skill set. This allows project managers to quickly locate the appropriate resources to assign to a Task or Request.

KINTANA Sign Out

Welcome John Smith

Modify Skills

Search for Skill

Please use the search criteria below to find the Skills you wish to modify.

Skill Name: Enabled:

Skill Category:

Display Results

*Maximum Results Per Page:

Search

Select Skill to Modify

Showing 1 to 10 of 10

Skill Name	Description	Skill Category	Enabled
<input type="checkbox"/> Architect	Architect		Y
<input type="checkbox"/> DBA	Database Administrator		Y
<input type="checkbox"/> Developer	Developer		Y
<input type="checkbox"/> Functional Analyst	Functional Analyst		Y
<input type="checkbox"/> Functional Architect	Administrates product functionality as it relates to product technical architecture		Y
<input checked="" type="checkbox"/> Project Manager	Project Manager		Y
<input type="checkbox"/> QA	Quality Assurance		Y
<input type="checkbox"/> Release Mgmt	Release Management		Y
<input type="checkbox"/> System Administrator	System Administrator		Y
<input type="checkbox"/> Technical Analyst	Technical Analyst		Y

Showing 1 to 10 of 10

Check All **Clear All** **Delete** **Create New Skill** **Prev** **Next**

Figure 2-2 Interface Used to Modify and Create New Skills

In Kintana 5.0, customers have the ability to organize and view their resources by skills and skill proficiencies. These skill attributes are available when searching for resources or displaying resource summary views such as capacity or utilization.

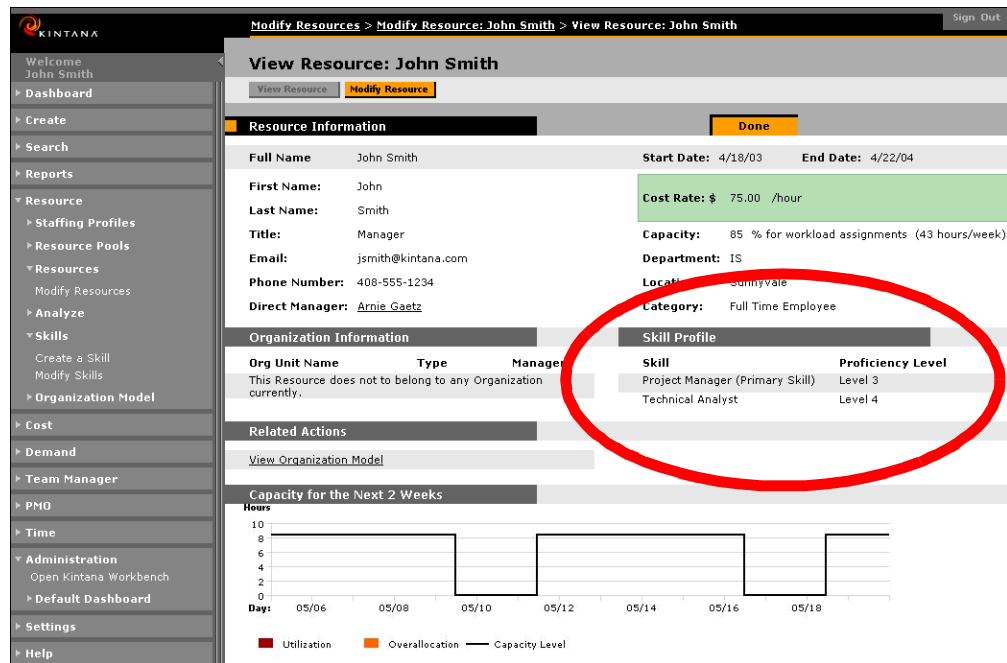


Figure 2-3 Resource's Skills Displayed on View Resource Page

Resource Planning/Budgeting

During the project assessment and planning process, managers need the ability to estimate resources required to complete a project, but likely will not know exactly which individual resources are required.

Kintana's new resource planning and budgeting functionality allows planners to build Resource Pools (*Figure 2-4*) to capture overall capacity and project Staffing Profiles (*Figure 2-5*) based on the number of resources (either by skill or by individual name) that are planned for a project. The staffing profiles provide the participants in the project initiation process with information necessary to approve or reject projects. Using visualizations and comparisons of staffing profiles against other staffing profiles or against the resource pool, it is easy to determine which projects will fit based on resource levels.

Figure 2-4 shows a "Development" Resource Pool. This pool represents all of the available resources with development skills. This Resource Pool can then be referenced when creating a Staffing Profile for an upcoming initiative.

Modify Resource Pool: Development Resources

Resource Pool Information

Pool Status: Active: ☒ Yes ☐ No

Name: Created On: Created By:

Description:

This Resource Pool is for:

☐ Organization Unit:

☐ Program:

☒ Unspecified

Start Period: Finish Period:

Resource Pool Breakdown

Pool Status: New

Skill	Resource	Q1 2003			Q2 2003			Q3 2003	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
<input type="checkbox"/> Architect		4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0
<input type="checkbox"/> DBA		6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0
<input type="checkbox"/> Developer		14.0	14.0	14.0	14.0	14.0	14.0	14.0	14.0
<input type="checkbox"/> Functional Analyst...		6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0
<input type="checkbox"/> Project Manager		4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0
<input type="checkbox"/> QA		2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
<input type="checkbox"/> Release Mgmt		2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
<input type="checkbox"/> Technical Analyst...		5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Total FTE's for Month		45.0	45.0	45.0	45.0	45.0	45.0	45.0	45.0
Average FTE's for Quarter		45.0			45.0			45.0	

Add Lines:

Figure 2-4 Resource Pool

Figure 2-5 shows a Staffing Profile for a CRM Upgrade, which utilizes resources from the Development Resource Pool.

Modify Staffing Profile: CRM Upgrade

Staffing Profile Information

Profile Status: Approved **Rework Plan** Active: ☒ Yes ☐ No

Name: CRM Upgrade Workload Category: Maintenance

Created On: April 24, 2003 Created By: Admin User

Description:

This Staffing Profile is for:

☐ Organization Unit:

☐ Program:

☒ Project: CRM Upgrade

☐ Unspecified

New lines on this Staffing Profile draw Resources from:

Resource Pool: Development Resource

Start Period: May 2003 Finish Period: May 2005

Staffing Profile Breakdown

		Q2 2003				Q3 2003					
		Apr		May		Jun		Jul		Aug	
Profile Status	Resource	Plan	Act	Plan	Act	Plan	Act	Plan	Act	Plan	Act
DBA				2.0		1.0		1.0		1.0	
Developer				4.0		4.0		4.0		4.0	
Functional Analys...				5.0		6.0		5.0		3.0	
Project Manager				2.0		2.0		2.0		2.0	
QA				3.0		1.0		1.0		1.0	
Technical Analyst...				6.0		6.0		6.0		6.0	
Total FTE's for Month				22.0	0.0	20.0	0.0	19.0	0.0	17.0	0.0
Average FTE's for Quarter					(Plan) 21.0		(Act) 0.0			(Plan) 17.33	

Show: ☐ Plan Only ☒ Plan and Actuals

Figure 2-5 Modify Staffing Profile Page

Organization Model

Project managers, resource managers, and executives need the ability to quickly view where a resource fits in the overall organization to make decisions on how to allocate resources and assign Tasks. They also need the ability to view overall capacity and availability across organizational silos or different skill groups.

Kintana 5.0 includes screens to build and view the organization model and supports both multiple hierarchical levels and matrix organizations. Kintana Security Groups can also be linked to organization groups, simplifying the process of setting up resources and security. Now, managers can quickly navigate the organization model to find the right manager to help resolve resource conflicts.

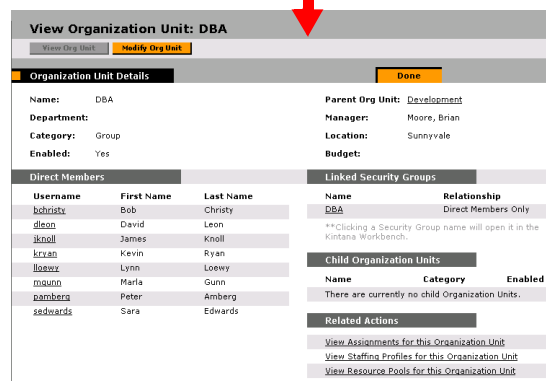
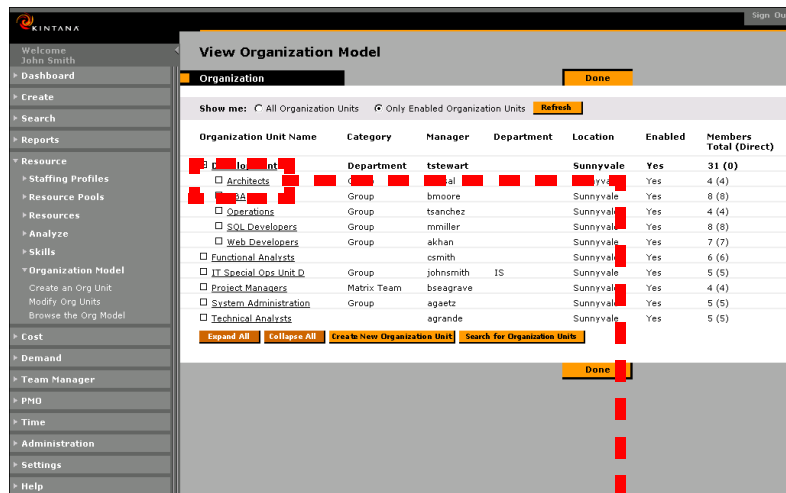


Figure 2-6 Organization Model and Organization Unit Interface

New Organization Open Interface

In the same style as the current User Open Interface and LDAP User Gateway, Kintana 5.0 includes an interface for importing organization information into Kintana. This open interface can import organizational models from 3rd party systems including LDAP databases, home grown organization modeling systems, and HR systems. Using this interface, a Kintana administrator can periodically synchronize the organizational model in Kintana with the authoritative data source within their company.

In general, the synchronization process will involve importing attributes of the various resources. The LDAP User Gateway or User Open Interface meets these requirements. Users/resources should be imported first, so that new resources are created initially and references to these users in the organization import will be successful.

Capacity/Utilization Visualizations

Kintana 5.0 includes several visualizations of capacity and utilization of resources, both at a summary level by attributes such as skill, project, or organization group, and at a detail level down to individual resources. Resource utilization can also be represented in personal Gantt charts. This information is automatically calculated and displayed by Kintana based on assignments to work items and resource definitions.

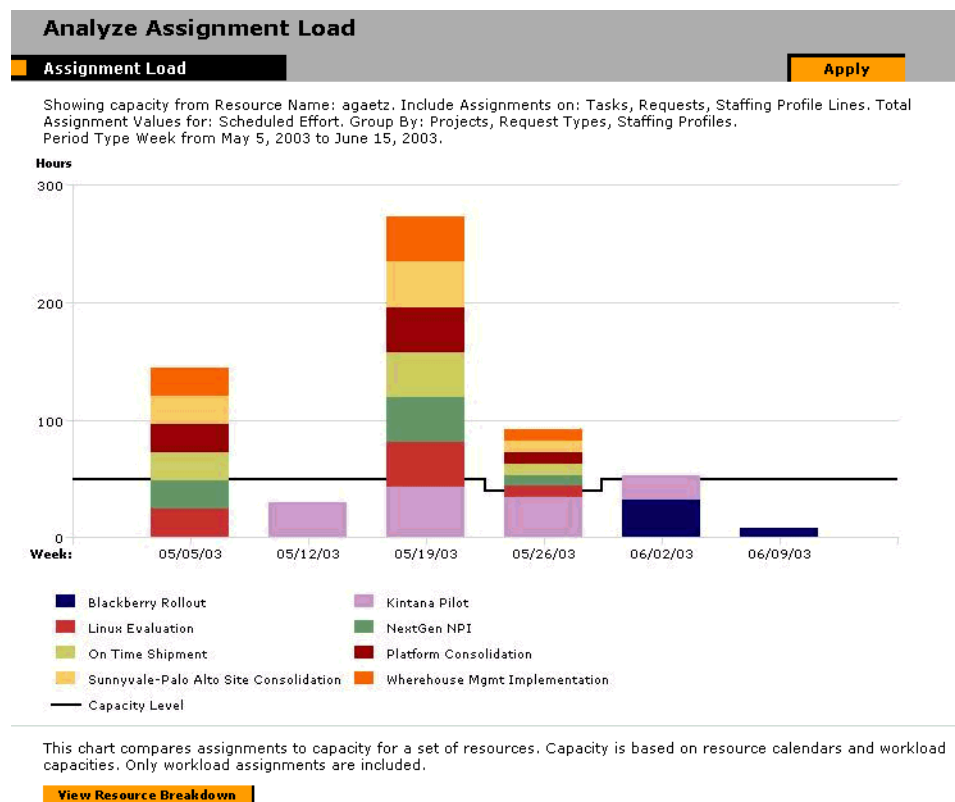


Figure 2-7 Analyze Assignment Load page showing the load on a single user.

LDAP Integration

To support large implementations, Kintana 5.0 extends our current LDAP integration to support resource attributes. For example, if skill or organization attributes are stored in LDAP, these attributes can be synchronized with Kintana.

LDAP integration is supported through the use of Kintana's Open Interface. See "[Kintana Open Interface](#)" for details.

Project and Program Cost Management

Release 5.0 provides functionality for planning costs for a project and tracking project performance in terms of costs. Increasingly, IT organizations are tracking detailed financial information on projects and operational activities and comparing the cost to the value that initiatives produce.

Kintana 5.0 provides standard cost fields for Tasks, Projects and Programs and rolls up the relevant cost data to the project or program level. Project managers, program managers, cost managers, financial groups, and other stakeholders of a project have visibility into the project performance in graphical format. Additional project exceptions are also included to display real-time health of projects and programs.

Managers can create financial budgets at the organization, program, or project level and use these budgets during the project initiation and approval process. Once in progress, actual costs and earned value are automatically calculated as resources complete their Tasks (based on resource rates defined on the new Resource page), and can be compared to the budgeted amounts. Standard cost variances and cost ratios are calculated based on the available data and provide real-time visibility into project performance. The program managers or project managers can track this data and use it to improve future project planning.

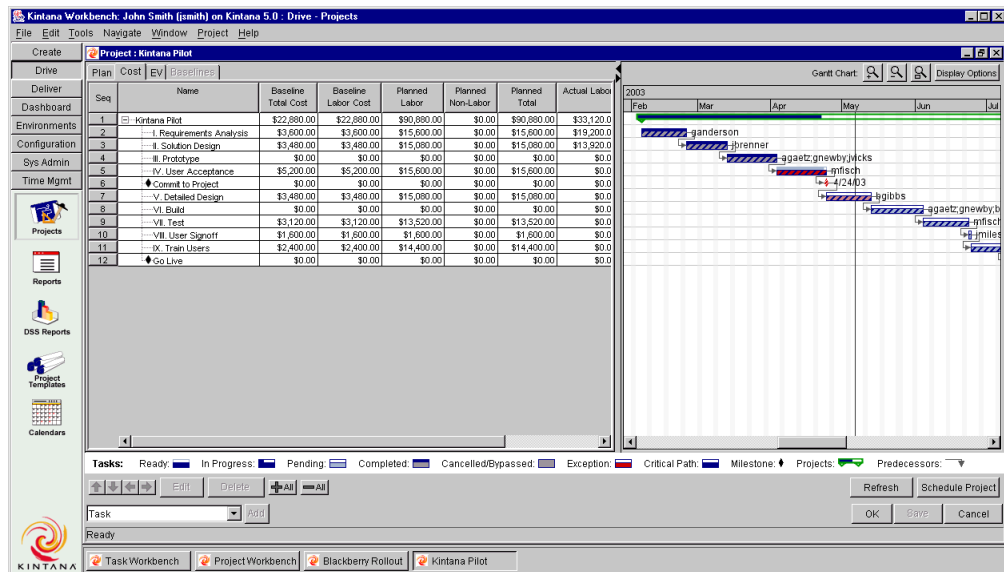


Figure 2-8 Cost information on the Project window

See the following Kintana documents for additional details on using this and other Project and Program cost-related functionality:

- ["Working with Projects"](#)

Organization and Project Planning/Budgeting

In most IT organizations, high-level budgets are created for projects and/or programs prior to performing detailed project planning. These budgets are used to help in the approval and prioritization process.

Kintana 5.0 provides the ability to create one or more budgets at the organization, program, or project level. Each budget goes through multiple stages and states and can be associated with a specific Project or Request. Budgets are comprised of one or more line items distinguished by configurable categories of expenses. Visualizations allow users to compare budgets against other budgets or actuals. One such visualization provides a comparison between a program budget and a project budget, and gives the program manager a view into how much of the overall program spend is allocated to its associated Projects.

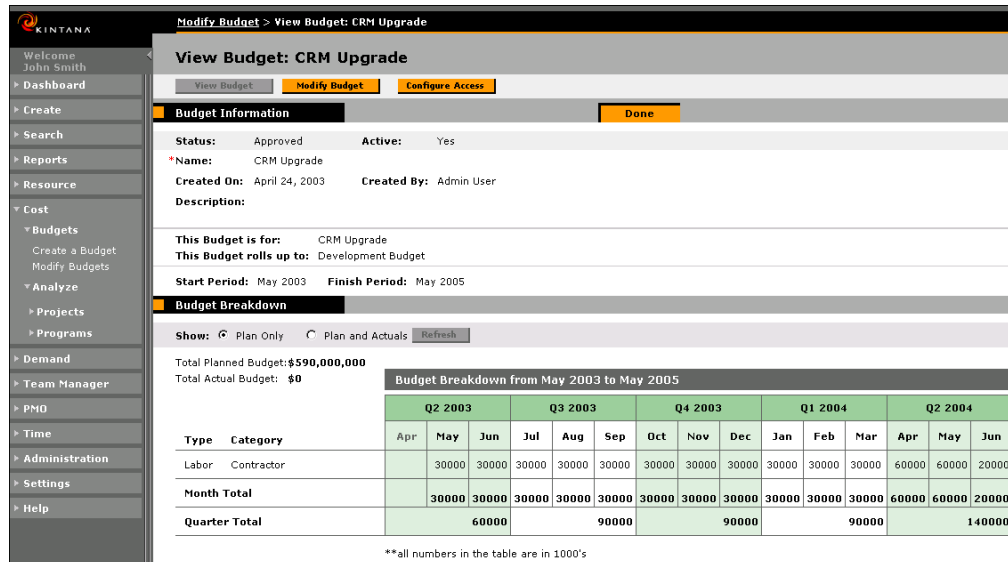


Figure 2-9 View Budget Page

Earned Value Analysis

Project and program managers use earned value analysis to measure performance of projects. At any point in time during a project, earned value shows how much budget should have been consumed based on the work completed, as well as the baseline cost for a Task (based on hours worked and resource rates). For example, if the budget (or planned value) for a Task is 100 and percentage complete on a Task is 75%, earned value is 75, regardless of actual effort completed. EVA is becoming more and more important in project management and has been established as a standard by the Project Management Institute (PMI).

In Kintana 5.0, earned value metrics are automatically calculated based on scheduled duration of Tasks and rates associated with resources. Visualizations allow managers to view earned value analysis and metrics for projects and or programs. New configurable exception conditions are also available on Projects to show red, yellow, and green health indicators based on cost metrics. For those users not interested in these cost metrics, they can be disabled for individual Projects.

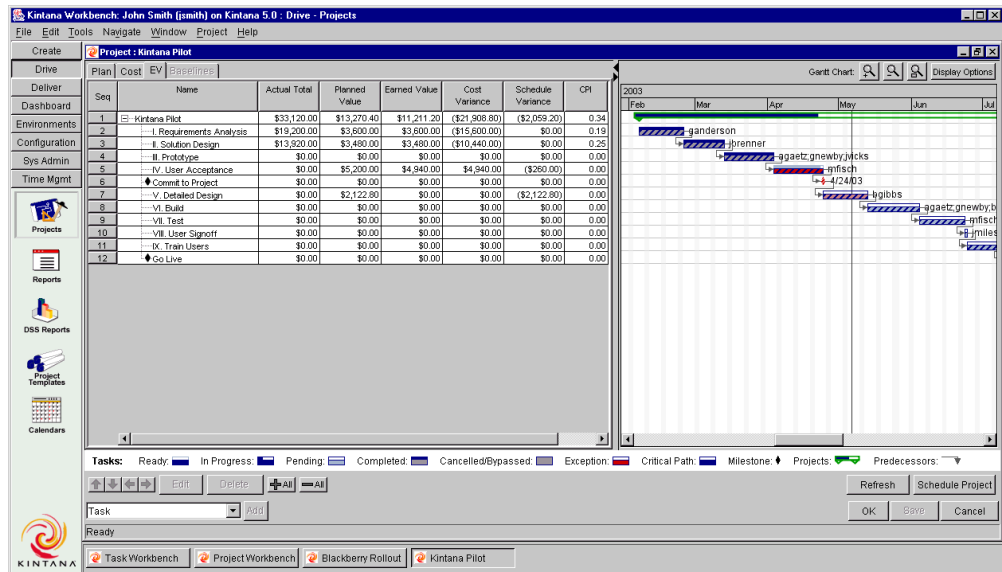


Figure 2-10 Earned Value analysis data on the Project Window

Resource Rates

To support automatic cost calculations on Projects, a resource rate attribute is included in the new resource definition page. A rate can be set by resource, or it can be defaulted based on a rate assigned to a skill attribute for a resource. Resource rates and other resource information are tightly controlled via security (access grants) so that users cannot view rate information for other resources.

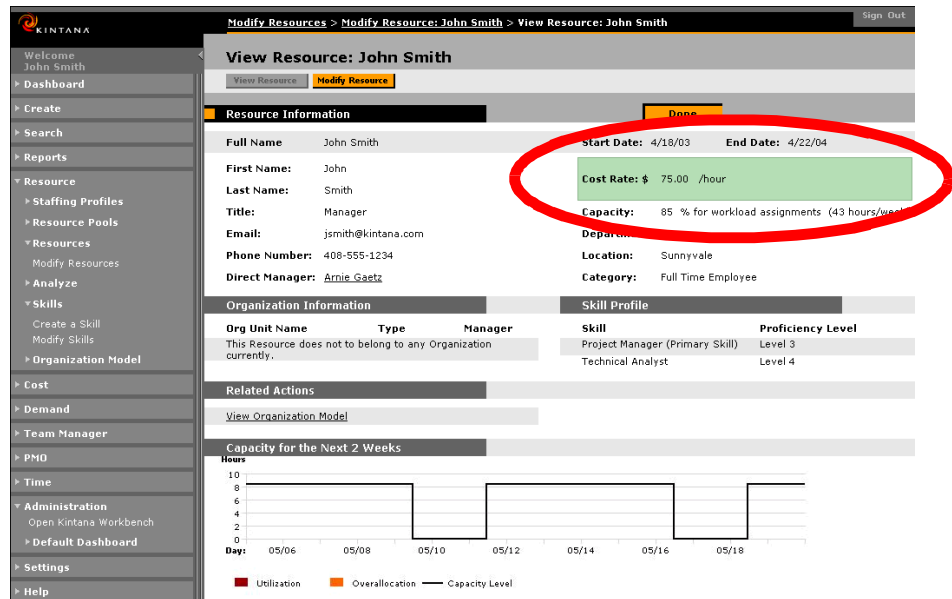


Figure 2-11 Resource cost rate on the View Resource page.

Project/Program Cost Visualizations

Program and Project cost visualizations present the data collected via automated roll-ups or budget entry to the end user in summary and detailed formats. Executives and managers use this information to better assess the health of the project portfolio.

At a high level, executives or program managers can compare program budgets and associated project budgets to verify planned spending across the organization. At a more granular level, project managers can list current projects on a multi-dimensional chart to show how projects are performing based on both cost and schedule metrics, as well as overall project size. Both of these are necessary for determining the proper mix of projects for the overall IT portfolio.

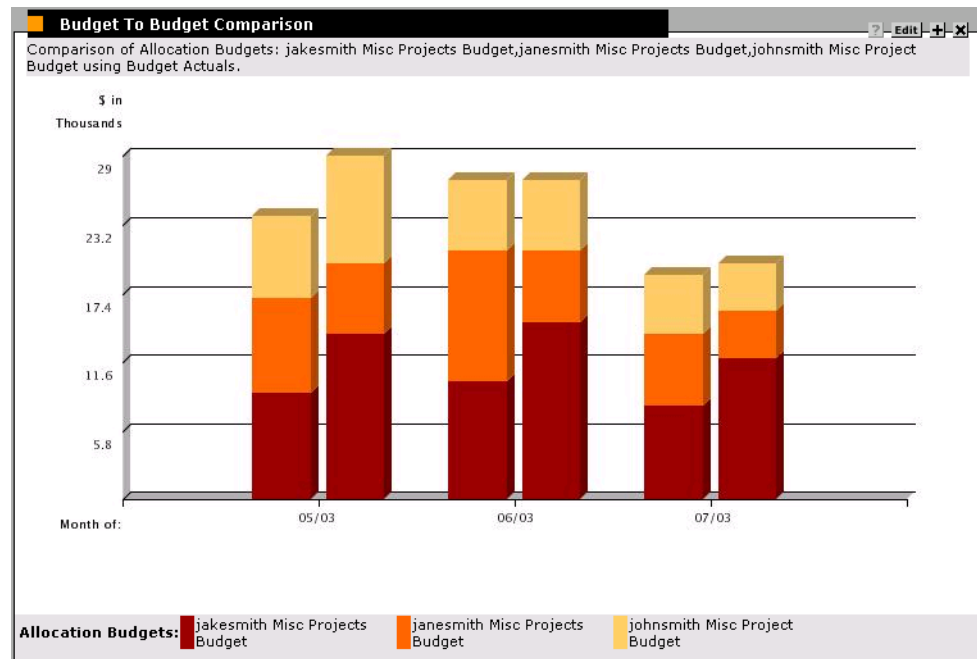


Figure 2-12 Budget to Budget Comparison Portlet

Enhanced Project Management Features

Kintana Drive in Release 5.0 extends its capabilities into more advanced project management functions without compromising its ease of use. New features in Kintana Drive are aimed at making the project manager's job easier: Gantt charts, baselines, inter-project predecessors, milestones, configurable working day, percent allocation for resource assignments, date notifications, and critical path visibility. Release 5.0 also includes improved locking mechanisms to better support multiple project managers planning projects at the same time.

Gantt Charts

For many project managers, Gantt charts are the primary method to visualize the status of their projects. When used in conjunction with milestones and critical path functionality, a Gantt chart provides users with an intuitive, one stop, quick summary visualization of a Project.

Kintana 5.0 includes Gantt charts that can display both by project (or portions of projects) and resource. Gantt charts are implemented in both the Kintana Interface and the Workbench. Project managers can use Gantt charts to better plan projects and resolve resource conflicts. Task owners, managers, and executives can include Gantt chart portlets on their Dashboard to get real-time views of work item progress or check resource availability.

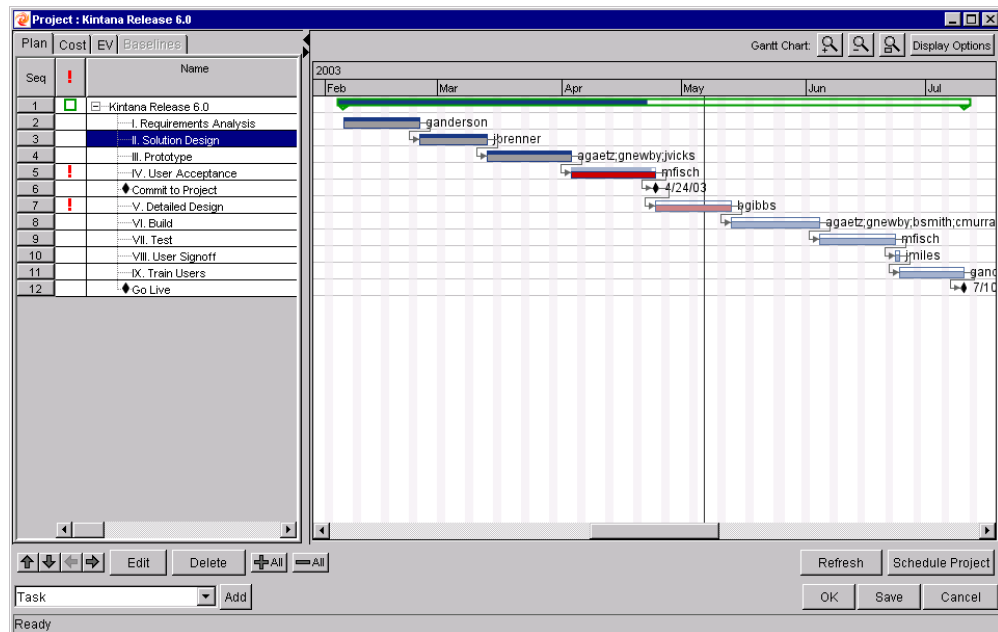


Figure 2-13 Gantt chart in the Project window

Baselines

A baseline is the original approved project plan for a project. As scope changes happen, the baseline is updated to reflect those changes that become part of the approved plan. Project managers use baselines to continuously monitor the health of their project in terms of schedule and cost by comparing the current project plan to the baseline plan.

In Kintana Drive 5.0, users are able to create one or more baseline snapshots of a project plan. Portlets and graphical views are provided to compare attributes like cost and schedule from the current project plan with the same attributes on a baseline.

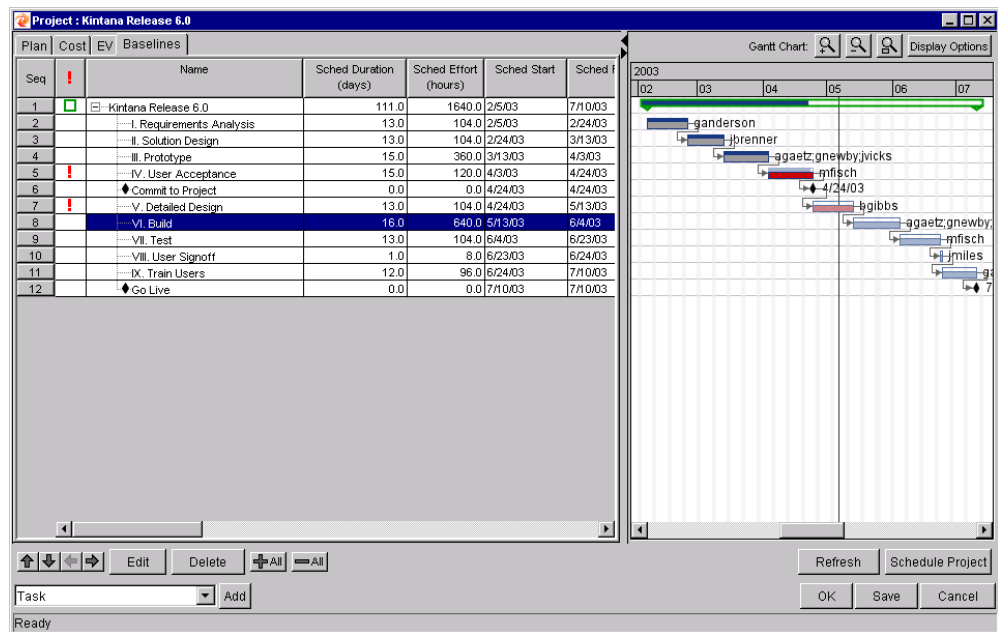


Figure 2-14 Baselines tab in the Project window

Milestones

A milestone is a significant event in a project and often marks the completion of a deliverable. Since milestones are often markers, they generally do not have a duration or effort associated with them. Before Release 5.0, milestones were often designated with Tasks.

Kintana Drive 5.0 includes the ability to designate true milestones in projects. Milestones can be set up with zero duration (the typical case) or can be set up with duration. New project exception conditions for milestones are included. Synchronization with Microsoft Project will also include milestones.

Mandatory Milestones and Tasks

Many organizations use standard project templates or milestones to ease reporting across divisional silos. While it is easy to start with a project template or list of milestones, existing project management tools allow the project manager to modify the work breakdown structure once it is created. In many cases, the standard Tasks or Milestones can be deleted.

In Kintana 5.0, Milestones and Tasks can be defined as mandatory so that they cannot be deleted from the work breakdown structure. This helps ensure that all projects in the portfolio include the information necessary to display organization-wide metrics on the Dashboard.

Critical Path

The critical path of a project is the sequence of Tasks that drives the calculated finish date of a project. In other words, when a Task on the critical path is late, the entire project slips. These Tasks are usually interrelated by dependencies on other Tasks, such as predecessors. Project managers monitor the critical path to ensure that a project finishes on time.

Kintana Drive 5.0 includes visualization of critical path on Gantt charts as well as new exception conditions based on late Tasks on the critical path. With these views, project managers have even more of a warning before projects run into problems.

Inter-Project Dependencies

Many organizations prefer to break down initiatives in smaller projects and then establish dependencies between Projects and between Tasks that reside in different Projects. This approach is much more efficient than having to manage all activities in a single, large project and facilitates splitting management of large projects across multiple project managers.

Kintana Drive 5.0 allows project managers to set up dependencies between Tasks and Projects that are contained in different Projects. For example, if a milestone in Project A must complete before Project B begins, a project manager will be able to say that the Project A milestone is a predecessor of Project B without having both Projects in the same project structure. The scheduling engine in 5.0 supports these cross project dependencies. In many programs, project dependencies are integral in determining impacts to schedule changes. The ability to define inter-project dependencies will prevent project managers from “forgetting” about these dependencies when changes occur to their project plan.

Split Allocation of Resources

Project Tasks are often assigned to more than one resource. Kintana 5.0 allows assignments of Tasks to multiple resources and allows the project manager to assign a portion of the allocation to each resource. The allocation determines how much of the overall duration of the Task is counted against the resource’s available capacity. This allocation will be included in synchronization with Microsoft Project.

Additional Notification Options

Currently, notifications in Drive can be sent when the status of a Task changes. Since many Tasks change to the “ready” state long before the scheduled start date, these notifications are not always useful, although the Task shows up at the appropriate time on the assigned resource’s Dashboard.

In Kintana Drive 5.0, notification setup supports designation of a time prior to scheduled start to send the notification. This allows additional flexibility to provide proactive notifications without cluttering a resource’s inbox.

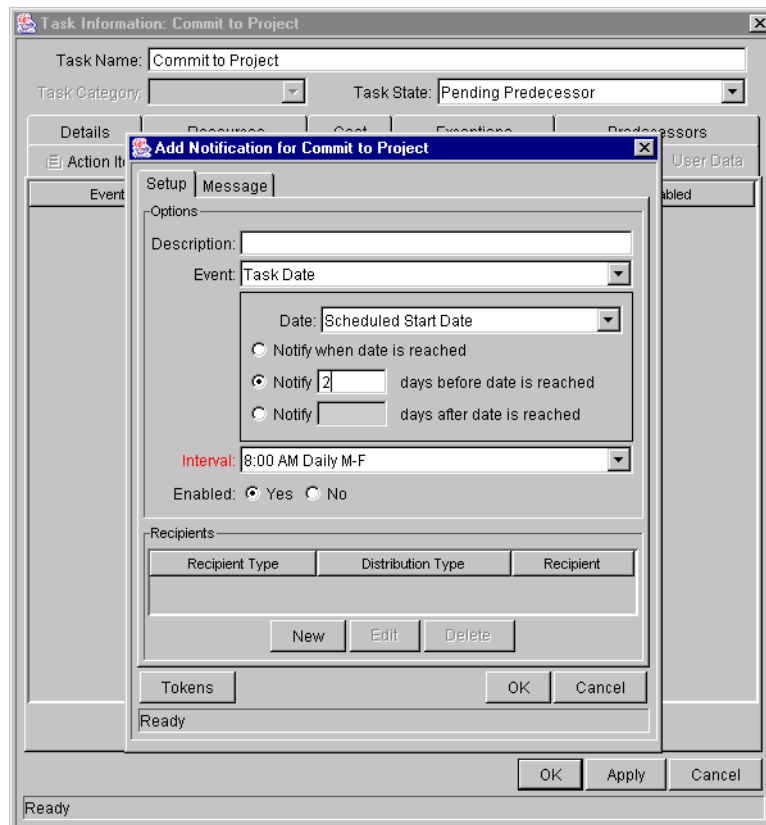


Figure 2-15 Task Notification window

Enhanced Concurrent Usage During Planning

When larger Projects are managed in Kintana Drive, it is common for multiple project managers to plan sub-projects at the same time. New locking functionality in Kintana Drive 5.0 supports this so that locking in Projects is limited to the Tasks being edited and dependent Tasks.

Now project managers have multiple options for large projects. Where a single project plan is desired, the Project can be broken into multiple sub-projects, with each managed by a different project manager. Where a single project plan is not required, multiple project plans can be linked together using inter-project predecessors. This change affects project planning only; current Kintana Drive functionality supports concurrent updates of Tasks by Task owners.

Required Action Items

In many cases, project managers (or Task owners) create Action Items associated with Tasks. These action items designate activities that may be important to completing the Task, but do not necessarily belong on the work breakdown structure. In Kintana Drive 5.0, action items can be set as required, which prevents a Task from being set to Completed until all related action items are also closed. The default operation still allows Project Tasks to be completed prior to completing all action items.

Additional Enhancements to the Project Window

Kintana has modified the Project window to better conform to user expectations. The following changes simplify the PROJECT window and are expected to improve user interaction with the Project planning interface:

- Removed the **SETTINGS** button from the PROJECT window. The user will now access the PROJECT SETTINGS window by selecting **PROJECT > SETTINGS** from the Workbench menu.
- Removed the Export to MSP button. The user will now access the Drive - Microsoft Project integration wizard using the menu.

Enhanced Request - Package Integration

Release 5.0 extends the current Request to Package integration to utilize the references interface. Users are allowed to create references between Package and Requests independent of workflow steps and are also able to create dependencies or predecessor relationships between the linked entities. This provides users with a much easier method for linking multiple Packages to Requests. The references interface has also been enhanced to provide

additional status information on the linked entities -- so from a Request, you can check the status of all linked Packages from a single screen rather than opening each Package.

Field Level Security

Kintana 5.0 provides a more granular field-level of security on Requests. In addition to the current ability to configure when a field needs to be updated, this feature adds the ability to restrict a field from being visible to certain people, or to restrict who has the ability to update a field. Security can be based on username, security group, or token and is available for all fields for which configuration is currently supported.

Further, fields can be hidden from all users by Request status. This allows creation of forms that are much easier to navigate for end users. While a Request form may have over one hundred custom fields, the form can now be designed to only show fields to the end user that are relevant at a particular step in the workflow process.

For example, before 5.0 it was possible to restrict who had access to update a Request. However, this was limited to specifying which users have access to the entire Request. Once the person had the ability to update the Request, any field in the Request could be seen or updated. With the new functionality it is possible to restrict the person from updating a particular field. For even more sensitive data (like salary or resource rate information) it is now possible to hide the field completely.

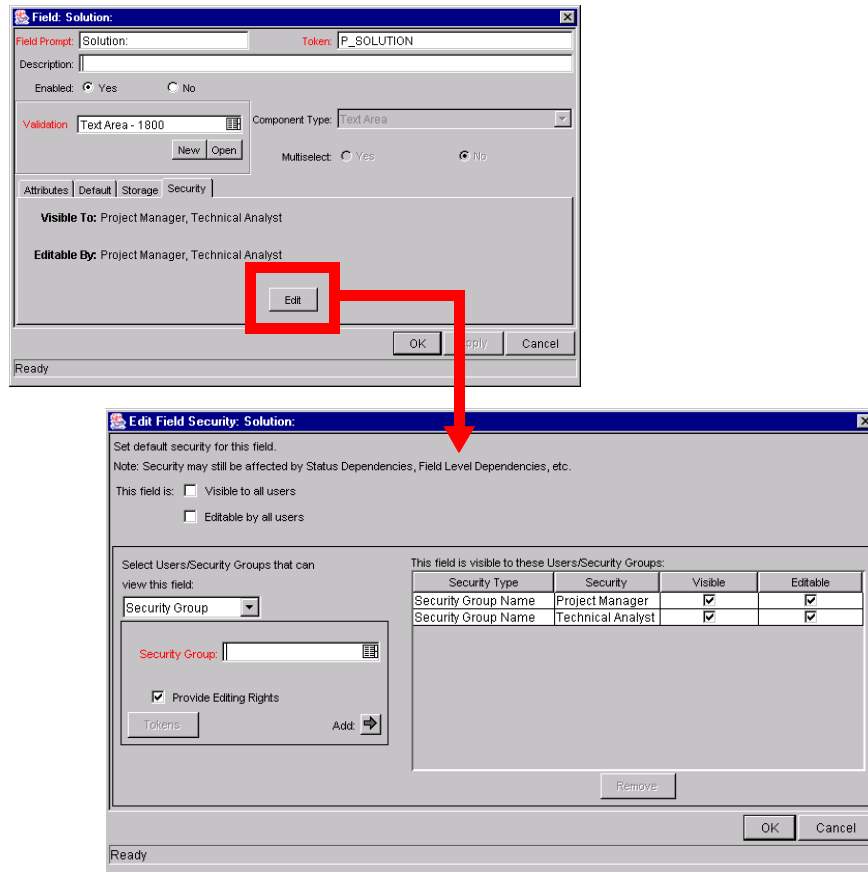


Figure 2-16 Interface for setting field-level security

Navigation and Functional Enhancements





New Field Components for Requests

In 5.0, the Costing and Resource Management initiatives introduces three new entities: Resource Pools, Staffing Profiles and Budgets. Kintana provides an interface to directly integrate with these entities within Request resolution processes. To facilitate this integration, Kintana introduced new field components that allow users to create and view these entities while working in the context of a Request.

Kintana also introduced the Table field component. The table component is used to enter multiple records into a single Kintana component. The table component can be configured to include multiple columns of varied data types. Additionally, this component supports rules for populating elements within the table and provides functionality for capturing column totals.

Table 2-1 lists the component types introduced in this release.

Table 2-1. New Component Types for Use on Requests

Component Type	Example	Description
Table Component	<p>Table Component (No Entries) </p>	<p>Used to enter multiple records into a single Kintana component. The table component can be configured to include multiple columns of varied data types.</p> <p>Fields of this component can only be added to Request Types, Request Header Types and Request User Data.</p>
Budget	<p>Budget (No Budget) </p>	<p>Field that can be added to the Request Type to enable access to view, edit or create Budgets associated with a Request or Project.</p> <p>Fields of this component can only be added to a Request Type.</p>
Staffing Profile	<p>(No Staffing Profile) </p>	<p>Field that can be added to the Request Type to enable access to view, edit or create Staffing Profiles associated with a Request or Project.</p> <p>Fields of this component can only be added to a Request Type.</p>
Resource Pool	<p>Resource Pool (No Resource Pool) </p>	<p>Field that can be added to the Request Type to enable access to view, edit or create Resource Pools associated with a Request or Project.</p> <p>Fields of this component can only be added to a Request Type.</p>

See the following Kintana documents for additional details on using this functionality:

- Validations chapter in *"Configuring a Request Resolution System"*
- Validations chapter in *"Configuring a Deployment System in Kintana"*

Ability to Save Requests Prior to Submit in Kintana Interface

Kintana 5.0 provides the ability to save a Request prior to submitting it through the Kintana Interface. A global menu item, “My Saved Request Drafts,” allows users to select previously saved Requests and submit them. Required fields are not enforced until the Request is actually submitted. This option is not enabled by default; it is turned on through a server.conf setting.

My Tasks Portlet Configuration

The My Tasks portlet now allows users to personalize the portlet. Users can change Tasks or the order of Tasks that are displayed in this portlet. For customers with large numbers of project plans, this will allow Task owners to better organize their Tasks on the Dashboard.

Access Grant User Information

A new Access Grant tab is included in the User window. This tab displays all Access Grants currently associated with a particular user. This removes the need for an administrator to navigate to the Security Group screen and query all the Security Groups to which a particular user has been assigned to figure out the full set of access grants assigned to the user. This enables visibility to assigned access grants directly from the User setup screen.

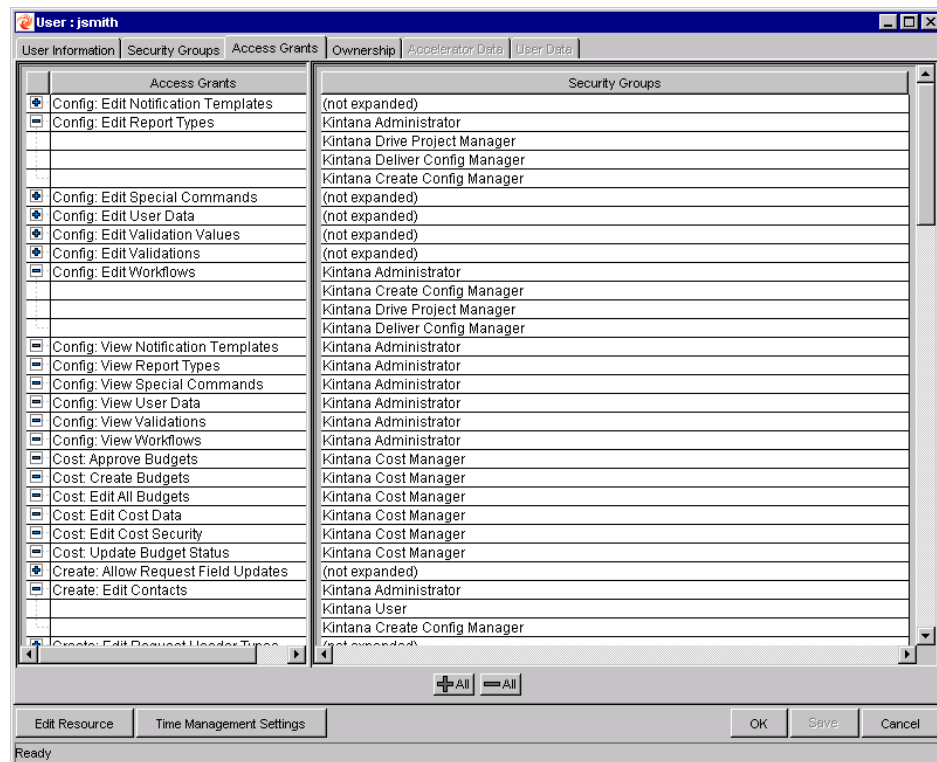


Figure 2-17 Access Grants tab on the User Window

Date Icon in Kintana Interface

In Kintana 5.0, clicking on the calendar icon in the Kintana Interface will open a calendar from which users can select a date to populate the field.

Custom Fields on a Request Header Type

The Request Header Type is being changed significantly in this release. You can now add custom fields to the Request Header Type. You can also divide the Request header into multiple sections, much like you can now with the fields on a Request Type.

You can also associate pre-configured Field Groups with your Request Header Types. Field Groups are a group of fields that are configured to enable specific functions within one or more of Kintana's Solutions.

All Request Header Type configuration is performed in the Kintana Workbench.

Notification on Field Changes in Requests

Based on multiple customer requests, this enhancement adds significant flexibility to the conditions for sending a notification. Specifically, it provides the ability to pick a field on a Request Type and trigger a notification when a field changes to a particular value or any value. The following fields are supported:

- Company
- Request Group
- Assigned Group
- Priority
- Application
- Assigned To
- Department
- Sub-Type
- Contact Name

Removal of Create Requests from Workbench Interface

With all Request functionality for end users now available in the Kintana Interface, Requests will no longer be accessible from the Workbench. Create Request Types, Request Type Headers, Contacts, Reports, and DSS Reports are unaffected by this change.

Single Login to Workbench and Kintana Interface

For users who access Kintana through both the standard Kintana (HTML) interface and the Kintana Workbench, only a single login will be required to access both interfaces. Previously, users were required to log in to each interface separately.

Users will log onto the Kintana's standard interface. They can then launch the Kintana Workbench using the link on the menu.

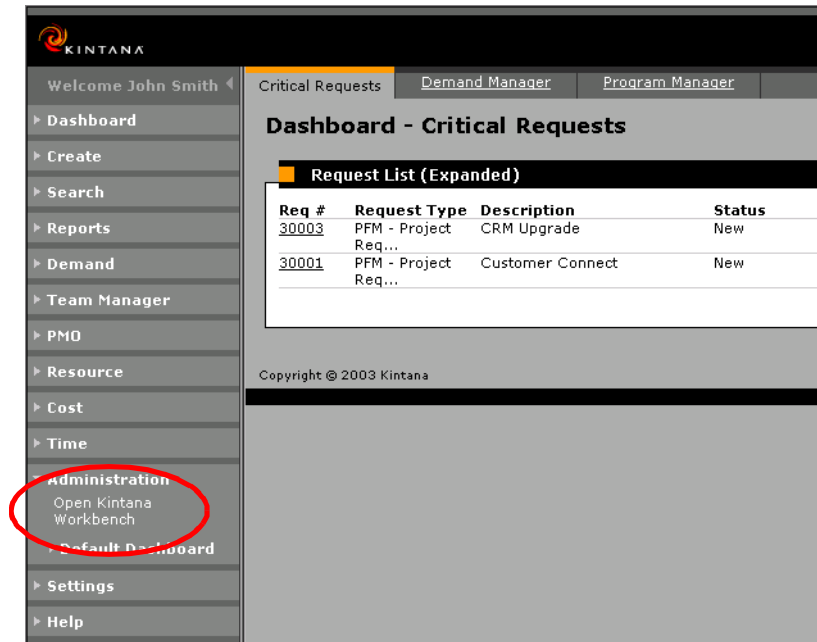


Figure 2-18 Menu item to launch the Kintana Workbench

New License Administration Window and Wizard

Kintana 5.0 introduces a new LICENSE ADMINISTRATION window for assigning licences to a batch of Kintana users. This window provides a single access point from which to view current license usage and availability in the system. You can then launch the ASSIGN LICENSE wizard to lead you through the process.

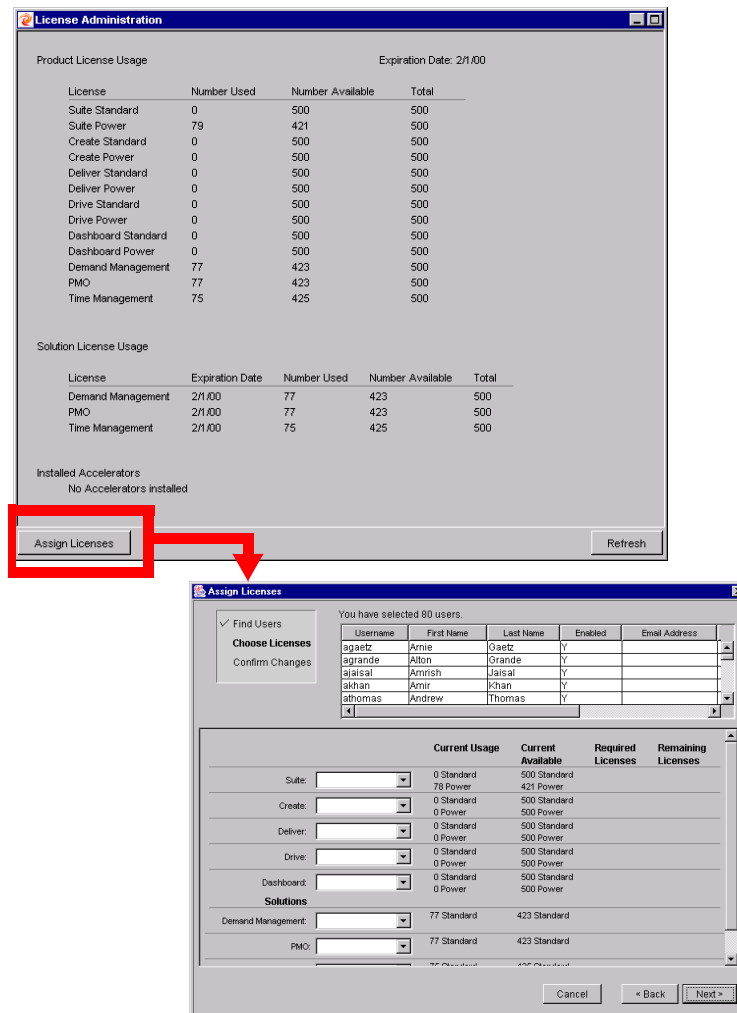


Figure 2-19 License Administration Window and Assign License Wizard

General UI Enhancements

In Kintana 5.0, the results of comprehensive usability studies have been incorporated in enhancements to navigation and user experience in the Kintana Interface.

- The current drop-down menus have been moved to sidebar navigation providing the user with vastly improved primary navigation context.
- The sidebar automatically remembers users' preferences, enabling them to easily perform common actions.

- The sidebar can be resized (or hidden) to allow maximum viewing of portlets and detail pages.
- A top navigation path has been added to give users better visibility to their path through the application and one-click navigation to return to previous screens.

The screenshot shows the Kintana PFM - Project Request interface for Request #30003. The sidebar on the left contains navigation options: Dashboard, Create, Search, Reports, Resource (Staffing Profiles, Resource Pools, Resources), Analyze (Assignment Load, Resource Pools, Project Assignments to Staffing), Skills, Organization Model (Create an Org Unit, Modify Org Units, Browse the Org Model), Cost, Demand, PMD, Time, Administration (Open Kintana Workbench, Default Dashboard), and Settings. The main content area displays details for a CRM Upgrade project. It includes a top navigation path: Request Search > Search Results > Request #30003. The project details section shows the Request No. (30003), Request Type (PFM - Project Request), Requested By (admin), Created On (April 24, 2003), and Request Status (New). Below this, there are tabs for PM Review, Header, and Details. The PM Review tab is active, showing a workflow (DEM - Project Initiative Process) and various form fields for project management, including Assigned To, Assigned Group, Requestor, Department, Priority, Application, Budget Estimate, Staffing Profile, Business Justification, Business Initiative, and Requestor Location.

Figure 2-20 Enhanced Kintana Interface

Dashboard Personalization Page Enhancements

In Kintana 5.0, the Dashboard Personalization Page has been updated to make it much easier for end users to personalize their Dashboard. When adding a portlet, users can now select multiple portlets from the list rather than one at a time. Adding a new Dashboard page or importing a template has been improved. The overall interface has also been updated to make it much easier for an end user to visualize changes or personalizations that have been made.

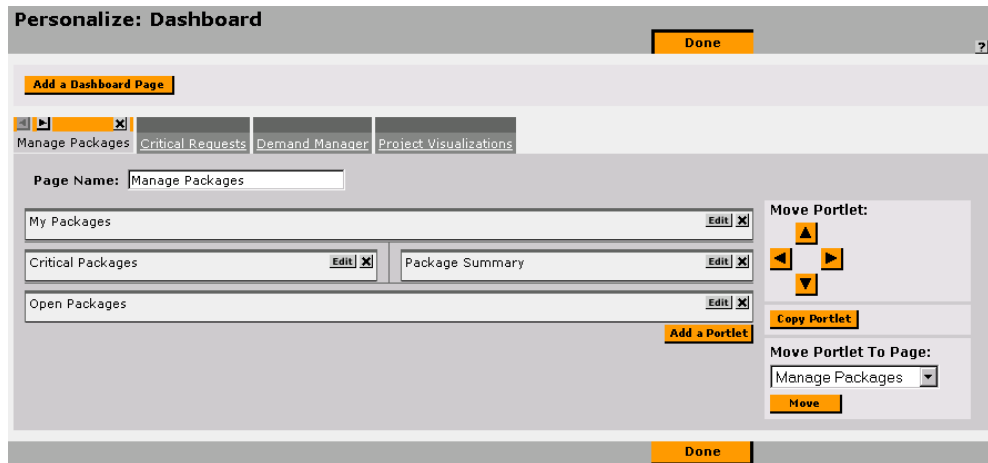


Figure 2-21 Personalize: Dashboard Page

New Dashboard Portlets in Kintana 5.0

The following portlets have been added to enable visibility into Kintana data captured by new and existing Kintana functionality. See ["Using the Kintana Dashboard"](#) document for descriptions of each portlet

Table 2-2. New Portlets in Kintana 5.0

Product Area	Portlet Name
Projects Cost Data Resources	Project Cost Summary For Dashboard
	Project Cost Summary for Project OV
	Resource Assignment
Cost Data	Budget To Budget Comparison
	Project Cumulative Cost Metrics
	Project Current Cost Metrics
	Program Cumulative Cost Metrics
	Program Current Cost Metrics

Table 2-2. New Portlets in Kintana 5.0

Product Area	Portlet Name
Projects	Project Budget and Staffing Profile vs. Actuals
	Project Gantt
	Resource Gantt
	Project Milestones
	Project Overview Gantt
	Project References
	Program Cost Summary
Resource Management	Analyze Assignment Load
	Analyze Resource Pools
	Compare Project to Staffing Profile
	Current Resource Load by Organization
	Current Resource Load By Skill
	Resource Pool List
	Staffing Profile List

New Reports in Kintana 5.0

The following reports have been added to enable visibility into Kintana data captured by new and existing Kintana functionality. See "[Kintana Reports](#)" for a full description of each report.

Table 2-3. New Reports in Kintana 5.0

Report Name	Description
Run Field Security Denormalization	Runs Field Level Security related denormalization Tasks for particular entities.
Run Kintana Organization Unit Interface	Imports data from the organization unit interface tables or an LDAP server.
Run License Usage Report	View current License usages.
Project Critical Path	View the Tasks on a Project's critical path.

Table 2-3. New Reports in Kintana 5.0

Report Name	Description
Project Schedule Change	Compare current schedule to a Baseline or compare Baselines.

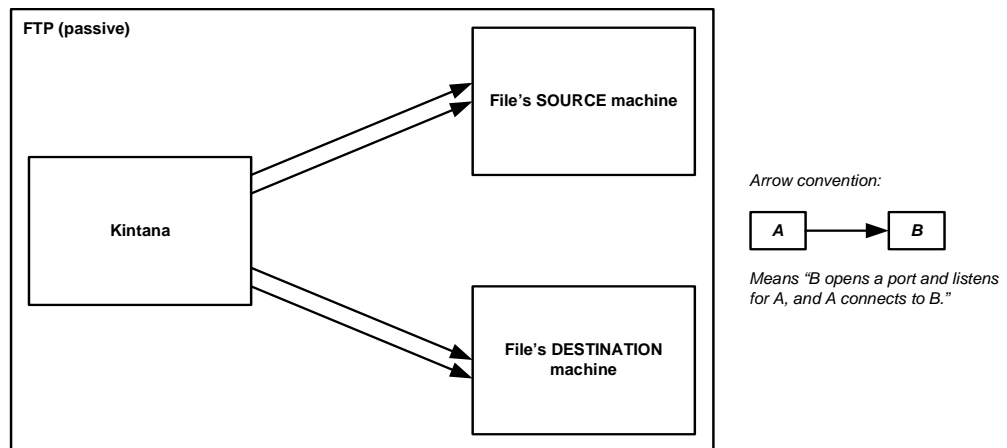
New Transfer Protocol for Environment Definitions

When configuring an Environment in Kintana, you need to select which transfer protocol should be used to transfer files to the specified server or client.

Kintana 5.0 supports the following new transfer protocol:

FTP (PASSIVE):

In this configuration, Kintana sends a command to the source or destination instructing that environment to open a port. Kintana then connects to that port.)



Note: PASV must be enabled on both the source and destination environments.

Updates to Kintana Solutions

Kintana 5.0 includes updates to several of the Kintana Solutions.

Demand Management

Kintana Demand Management is a solution offering that ensures that all demands on IT, regardless of type or source, are captured, evaluated, prioritized, scheduled and resolved efficiently.

In addition to significant configuration enhancements to shorten implementation times and complexity, Demand Management in Kintana 5.0 allows enterprises to further divide demand into multiple groups. This allows different groups within the organization to set up different sets of demand and track them separately, while still allowing roll-ups of all demand across groups for the entire organization.

For example, a large IT organization may have multiple groups set up to support different business units. The consumer business unit can now set up a consolidated picture of demand for their processes while the wholesale business unit has a complete different set of processes. Corporate IT has their own consolidated picture of demand that includes all processes from both business units.

See the following Kintana documents for additional details on using this functionality:

- [*"Demand Management User Guide"*](#)
- [*"Demand Management Configuration Guide"*](#)

Program Management Office (PMO)

Kintana Program Management Office ensures that all IT projects are delivered with high quality and functionality, on time, within budget. The solution provides project and process management capabilities required to run programs efficiently throughout the initiation, planning, execution, control, and closing lifecycle. It provides and enforces processes for managing scope, risk, quality, issues, schedules, resources, releases, and costs.

In Kintana 5.0, the new cost management features extend to programs, giving program managers visibility into costs across projects. Cost data is automatically captured and available in real time for all programs for which it is enabled (see [*"Project and Program Cost Management"*](#) on page 16 for more details). Programs also have additional levels of security around visibility of data to better serve enterprise customers.

See the following Kintana documents for additional details on using this functionality:

- [*"PMO User Guide"*](#)
- [*"PMO Configuration Guide"*](#)

Time Management

Kintana Time Management streamlines time collection and improves accuracy across the wide range of work performed by IT. For the first time, Kintana helps you manage both sides of the equation, namely the work demand side and the time collection side, in a common system.

In Release 5.0, Time Management is further integrated into the Kintana suite in both function and user interface, allowing customers to move seamlessly between Time Management and other products in the Kintana Suite. Kintana Drive can also be set up to allow time sheet entries to automatically update Project Task actuals. To improve the usability, the timesheet screen now allows the user to scroll on the timesheet entry without scrolling the entire screen. Another enhancement allows multiple period types in a single installation. For example, one group may enter and approve timesheets on a Monday through Sunday time period where another tracks Saturday through Friday.

See the following Kintana documents for additional details on using this functionality:

- [*"Time Management User Guide"*](#)
- [*"Time Management Administration Guide"*](#)

Kintana Accelerator Updates

Kintana Accelerators simplify the complex activities required to maintain large enterprise applications like Oracle, PeopleSoft, SAP, and Siebel and Web applications built using Java, Oracle and others. These applications are constantly changing as new modules are added, customizations developed, configurations modified, patches applied, etc. The changes must be done precisely across the Development, Test, Stage and Production system landscape, usually by highly paid and hard-to-find specialists. Kintana Accelerators automate these precise Tasks using best practice processes designed specifically for each application. And they are certified by the application providers, so users know that Kintana Accelerators integrate seamlessly.

Kintana 5.0 includes several enhancements to accelerators. Refer to the individual Accelerator documents for details.

Chapter 3 Upgrade Impacts

Kintana 5.0 includes a number of new features that improve the users' interactions and overall Kintana system performance. To facilitate these new features, we have updated the Kintana data model and have selected alternate technologies which help us deliver the best Kintana solution. The following sections outline these changes and provide any required instructions for performing a successful upgrade. Following the below instructions will ensure the continued integrity of your Kintana data and configurations.

Note

Customers upgrading to Kintana version 5.0 will follow a different upgrade path, depending on their current Kintana version:

Current Version	Through Version	Final
Kintana 3.x (or earlier)**	-----> 4.0	-----> 5.0
Kintana 4.0	----->	-----> 5.0
Kintana 4.5	----->	-----> 5.0
Kintana 4.6	----->	-----> 5.0

Because you have the option of upgrading directly from 4.0, 4.5 and 4.6 to Kintana 5.0, this chapter includes information on the the upgrade impacts introduced in the Kintana 4.5, Kintana 4.6, and Kintana 5.0 releases. Consequently, if you have already upgraded to release 4.5 or 4.6 may notice some redundancy in this document.

** If you are currently on any 1.x release of Apps*Integrity, you must first upgrade to release 2.0.1. Please consult the Kintana web site for instructions.

This chapter is structured to allow you to quickly locate the upgrade impacts that apply to your specific upgrade strategy (based on your current version). To use this chapter:

1. Determine your upgrade path.

2. Review the server.conf and access grants sections. They include information from the Kintana 4.5, 4.6, and 5.0 releases.
3. If you are upgrading from 4.0 or earlier, review the impacts in all of the impact sections (Kintana 4.5, Kintana 4.6, and Kintana 5.0).
4. If you are upgrading from 4.5, review the impacts from the 4.6 and 5.0 sections.
5. If you are upgrading from 4.6, review only the impacts from the 5.0 section.

This document discusses the following topics:

- [Changes to the server.conf file \(4.5, 4.6 and 5.0\)](#)
- [New and Modified Access Grants \(4.5, 4.6, and 5.0\)](#)
- [Kintana 5.0 Upgrade Impacts](#)
- [Kintana 4.6 Upgrade Impacts](#)
- [Kintana 4.5 Upgrade Impacts](#)
- [Accelerator Impacts](#)

Changes to the server.conf file (4.5, 4.6 and 5.0)

This section describes the new and obsolete server parameters located in the server.conf file.

Table 3-1. New Server Configuration Parameters

Parameter	New in Release	Description / Sample Value
KINTANA_SESSION_TIMEOUT	5.0	Instructs the system to disconnect a user session that has had no activity for the specified timeout value. (In Minutes). A value of 0 indicates no timeout. This parameter replaces the deprecated parameters WORKBENCH_SESSION_TIMEOUT and WEB_SESSION_TIMEOUT.
DATE_NOTIFICATION_INTERVAL	5.0	The number of minutes between each check to send date based notifications.
ENABLE_PENDING_PROJECT_CHANGE	5.0	This parameter replaces the ENABLE_PENDING_STATE_CHANGE parameter.

Table 3-1. New Server Configuration Parameters

Parameter	New in Release	Description / Sample Value
PENDING_PROJECT_CHANGE_INTERVAL	5.0	This parameter replaces the PENDING_STATE_CHANGE_INTERVAL parameter.
ALLOW_SAVE_REQUEST_DRAFT	5.0	Allow the users to save the Requests without automatically submitting them in HTML interface. Default: False
WORKBENCH_PRESENTATION_KEY	5.0	If there are any standalone Workbench users and a custom presentation key is in use, this parameter will need to be added for that installation. Default: "knta"
PENDING_COST_EV_UPDATE_SERVICE_ENABLED	5.0	Enables a service which asynchronously propagates updates to Project Earned Value Analysis data, when those updates could not be made immediately. Default: False
PENDING_COST_EV_UPDATE_SERVICE_DELAY	5.0	The number of seconds to wait when the Pending Cost EV Update service completes, before starting again. Default: 5
VISUALIZATION_EXEC_TIMEOUT	5.0	Duration (in seconds) before interactive visualizations (graphs and charts) time out. Used to limit long-running queries. Using a timeout in this case avoids taking up database CPU when users end their sessions before visualizations are completed. Default: 120
WORK_ITEM_BREAKDOWN_SERVICE_ENABLED	5.0	Enables a server thread which asynchronously decomposes the [scheduled and actual] effort of work item assignments into daily units. These daily units provide the building blocks for Resource Management visualizations. Default: True
WORK_ITEM_BREAKDOWN_SERVICE_DELAY	5.0	The number of seconds to wait when the Work Item Breakdown Service completes, before starting again. Default: 5
WORK_ITEM_UPDATE_SERVICE_ENABLED	5.0	Enables a service which asynchronously propagates external updates to Kintana work items, when those updates could not be made immediately. Default: True

Table 3-1. New Server Configuration Parameters

Parameter	New in Release	Description / Sample Value
WORK_ITEM_UPDATE_SERVICE_DELAY	5.0	The number of seconds to wait when the Work Item Update service completes, before starting again. Default: 120
AUTOCOMPLETE_STATUS_REFRESH_RATE	4.6	Specifies how often a command-validated auto-complete window refreshes in the HTML interface. The default is 5 seconds.
CLOSE_BROWSER_ON_APPLET_EXIT	4.6	Closes the browser window that initiated the applet. This is used to expire cookies associated with that browser. The default is "false." Note: this setting should not be used when any users are running Kintana as an application.
THREAD_POOL_MAX_THREADS and THREAD_POOL_MIN_THREADS:	4.6	Determines how many Packages can be simultaneously executed within a Release Distribution. To improve performance when processing a large number of packages in a Distribution, increase the THREAD_POOL_MAX_THREADS. This is documented in the Optimizing the Kintana Server doc.
REQUEST_DEFAULT_CACHE_TIMEOUT	4.6	See the "Configuring the Kintana Server for Optimal Performance" for a description of this parameter.
SINGLE_SIGNON_PLUGIN	4.6	Used for Single Sign-On (SSO) integration to specify the java class implementing the SSO functionality.
AUTHENTICATION_MODE	4.5	Required for the Kintana server to determine what method of user authentication to use. Currently defaults to the KINTANA value. The MIXED value is no longer valid; "mixed" values can be separated with a comma, e.g. KINTANA, LDAP. Valid values: KINTANA, LDAP, NTLM, SITEMINDER.
LOGON_METHOD	4.5	Specifies the user logon method: username or Logon ID. Defaulted to "USER_NAME". See the "Optional Configuration" chapter of the Kintana Installation Guide for more detailed information. Valid Values: LOGON_ID, USER_NAME
USE_JAVA_PLUGIN	4.5	Instructs the system to use the Java Plug-In instead of the browser JVM. Defaulted to "false." See the "Optional Configuration" chapter of the Kintana Installation Guide for more detailed information. Valid Values: false, true
USER_PASSWORD_ENCRYPTION	4.5	Specifies standard encryption or one-way hashing for user passwords. Defaulted to "STANDARD". See the "Optional Configuration" chapter of the Kintana Installation Guide for more detailed information. Valid Values: STANDARD, ONE_WAY_HASH

Table 3-1. New Server Configuration Parameters

Parameter	New in Release	Description / Sample Value
ENABLE_STATISTICS_CALCULATION	4.5	Kintana can automatically rebuild statistics for the cost-based optimizer for Oracle versions 8.1.6 and higher. This will improve the performance of your Kintana instance. Leave this as "True" unless you would rather perform this operation manually. By default, this will occur every Sunday at 1AM. If you need to configure when this occurs, or have more questions, please consult the Kintana Install Guide.
STATS_CALC_DAY_OF_WEEK	4.5	The day of the week the statistics should be calculated. Valid values are in the range 1 to 7, where 1 is Monday and 7 is Sunday. Defaults to 7 (Sunday).
STATS_CALC_WAKE_UP_TIME	4.5	The hour of the day the statistics should be calculated. Statistics calculation will begin within an hour of the time given. Valid values are in the range of 0 (midnight) to 23 (11PM). Defaults to 1 (1AM).
STATS_CALC_WEEK_INTERVAL	4.5	The number of weeks that should occur between statistic calculation. If set to 1 statistics will be collected every week; if set to 2 statistics will be calculated every other week. Valid values are in the range 1 to 52. Defaults to 1 (weekly).
MULTICAST_IP	4.5	(Kintana cluster configuration only.) An IP address in the range of 224.0.0.0 to 239.255.255.255. Those in the range of 224.x.x.x and 239.x.x.x are standard addresses. Any other addresses can be used safely for Kintana. We default it to 225.39.39.244, which is an address that is not known to be used by any other vendor. You will likely never have to change this. See the Advanced Configuration Guide on Kintana Cluster Configuration for more information.
MULTICAST_CLUSTER_NAME	4.5	(Kintana cluster configuration only.) To allow more than one Kintana cluster to run on the same subnet and also share the same multicast address with other clusters, every cluster must have a unique cluster name. The cluster name is defaulted to Kintana. See the Advanced Configuration Guide on Kintana Cluster Configuration for more information.
MULTICAST_PORT	4.5	(Kintana cluster configuration only.) A multicast address is made up of the ip and port. Any port is acceptable. The port is defaulted to 9000. You will likely never have to change this. See the Advanced Configuration Guide on Kintana Cluster Configuration for more information.
PORTLET_EXEC_TIMEOUT	4.5	The amount of time (in seconds) for which the Portlet should run before it is automatically disconnected from the database. (default is 20 seconds)

Table 3-1. New Server Configuration Parameters

Parameter	New in Release	Description / Sample Value
SEARCH_TIMEOUTS	4.5	The amount of time (in seconds) for which the HTML search action should run before it is automatically disconnected from the database. (default is 60 seconds).

Table 3-2. Obsolete Configuration Parameter

Parameter	Description
WORKDAY_HOURS	This parameter was previously used by the Kintana Time Management Solution. Since Kintana now supports a configurable working day, the parameter introduced for that purpose is no longer necessary. When upgrading, if the parameter exists, it will be used to set the working day and then removed from server.conf file.
USE_JAVA_PLUGIN	Because users running the Kintana Workbench are required to use the Java Plugin in 5.0, this parameter is no longer needed.
WORKBENCH_SESSION_TIMEOUT	Since workbench session and Kintana interface session will be paired, there is no need to have a different session time out parameter. These two parameters are replaced with a single parameter: KINTANA_SESSION_TIMEOUT.
WEB_SESSION_TIMEOUT	
MSP_SCHEMA_NAME	These parameters are no longer needed for Kintana operation. They can be safely removed.
PUSH_CONCURRENT_REQUEST_LOGS	

New and Modified Access Grants (4.5, 4.6, and 5.0)

Kintana introduces the following new and modified Access Grants. Access Grant changes can impact your Kintana security model: enabling more or restricting functionality for Security Groups with those grants.

Table 3-3. New Kintana 5.0 Access Grants

Category	Access Grant Name	Description
Cost	Approve Budgets	Change the BUDGET STATUS value on the MODIFY BUDGET page to “ APPROVED .” The user must also have the UPDATE BUDGETS STATUS grant and either the EDIT BUDGET or EDIT ALL BUDGETS grant to perform this function. Note that “ APPROVED ” only appears in the BUDGET STATUS list if you have this grant.
Cost	Create Budgets	Create Budgets using the standard Kintana interface. The user must also have either the EDIT BUDGETS or EDIT ALL BUDGETS grant to perform this function.
Cost	Edit All Budgets	Edit Budget information for all Budgets in Kintana.
Cost	Edit Budgets	Edit Budget information when the user has been granted edit access in the CONFIGURE ACCESS FOR BUDGET page.
Cost	Edit Cost Data	Edit Cost data related to Tasks, Projects, Programs, Resources and skills. The user must also have access to edit these entities.
Cost	Edit Cost Security	Edit Cost security settings for a Project in the PROJECT SETTINGS window. Edit Cost security settings for a Program in the PROGRAM SECURITY CONFIGURATION page. Note: The user must also be able to edit the Project Settings and Program Security in order for this grant to be relevant.
Cost	Update Budget Status	Change the BUDGET STATUS value on the MODIFY BUDGET page. The user must also have either the EDIT BUDGETS or EDIT ALL BUDGETS grant to perform this function.
Cost	View All Budgets	View Budget information for all Budgets in Kintana.
Cost	View Budgets	View Budget information when the user has been granted view access in the CONFIGURE ACCESS FOR BUDGET page.
Cost	View Cost Data	View Cost data related to Tasks, Projects, Programs, Resources and skills. The user must also have access to view these entities.
Demand Mgmt	Manage Demand	Access the Demand Management scheduling functions, the consolidated picture of demand, and all other Demand Management menu items related to scheduling or managing demand.
PMO	Edit Programs	Update Programs where the user is specified as the Program Manager.

Table 3-3. New Kintana 5.0 Access Grants

Category	Access Grant Name	Description
PMO	Manage Programs	Create and update any Program.
PMO	View Programs	View Program definitions.
Resource Mgmt	Approve Resource Pools	<p>Change the RESOURCE POOL STATUS value on the MODIFY RESOURCE POOL page to “APPROVED.” The user must also have the UPDATE RESOURCE POOL STATUS grant and either the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS grant to perform this function.</p> <p>Note that “APPROVED” only appears in the RESOURCE POOL STATUS list if you have this grant.</p>
Resource Mgmt	Approve Staffing Profiles	<p>Change the STAFFING PROFILE STATUS value on the MODIFY STAFFING PROFILE page to “APPROVED.” The user must also have the UPDATE STAFFING PROFILE STATUS grant and either the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES grant to perform this function.</p> <p>Note that “APPROVED” only appears in the STAFFING PROFILE STATUS list if you have this grant.</p>
Resource Mgmt	Create Resource Pools	Create Resource Pools using the standard Kintana interface. The user must also have either the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS grant to perform this function.
Resource Mgmt	Create Staffing Profiles	Create Staffing Profiles using the standard Kintana interface. The user must also have either the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES grant to perform this function.
Resource Mgmt	Edit All Resource Pools	Edit and delete any Resource Pool.
Resource Mgmt	Edit All Resources	Edit the Resource information for any Resource defined in Kintana.
Resource Mgmt	Edit All Skills	Create, edit, and delete all Skills defined in Kintana.
Resource Mgmt	Edit All Staffing Profiles	Edit and delete any Staffing Profile.
Resource Mgmt	Edit Entire Organization	Edit and delete any Organization Unit.
Resource Mgmt	Edit Only Organization Units That I Manage	Edit Organization Unit information for units that list the current user as the Manager in the VIEW ORGANIZATION UNIT page. Also delete any of these Organization Units.

Table 3-3. New Kintana 5.0 Access Grants

Category	Access Grant Name	Description
Resource Mgmt	Edit only resources that I manage	Edit Resource information for Resources that list the current user as the Direct Manager. A resource's Direct Manager is displayed on the VIEW RESOURCE page.
Resource Mgmt	Edit Resource Pools	Edit Resource Pool information when the user has been granted edit access in the CONFIGURE ACCESS FOR RESOURCE POOL page. Delete these Resource Pools when given sufficient access in the CONFIGURE ACCESS FOR RESOURCE POOL page for that Resource Pool.
Resource Mgmt	Edit Staffing Profiles	Edit Staffing Profile information when the user has been granted edit access in the CONFIGURE ACCESS FOR STAFFING PROFILE page. Delete these Staffing Profiles when given sufficient access in the CONFIGURE ACCESS FOR STAFFING PROFILE page for that Staffing Profile.
Resource Mgmt	Update Resource Pool Status	Change the RESOURCE POOL STATUS value on the MODIFY RESOURCE POOL page. The user must also have either the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS grant to utilize this grant.
Resource Mgmt	Update Staffing Profile Status	Change the STAFFING PROFILE STATUS value on the MODIFY STAFFING PROFILE page. The user must also have either the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES grant to utilize this grant.
Resource Mgmt	View All Resource Pools	View Resource Pool information for all Resource Pools.
Resource Mgmt	View all resources	View the Resource information page for any Resource defined in Kintana.
Resource Mgmt	View All Skills	View all Skills defined in Kintana.
Resource Mgmt	View All Staffing Profiles	View Staffing Profile information for all Staffing Profiles.
Resource Mgmt	View my personal resource info only	View only the user's own Resource information page.
Resource Mgmt	View Organization	View the Organization Model and Organization Unit detail pages.
Resource Mgmt	View Resource Pools	View Resource Pool information when the user has been granted view access in the CONFIGURE ACCESS FOR RESOURCE POOL page.
Resource Mgmt	View Staffing Profiles	View Staffing Profile information when the user has been granted view access in the CONFIGURE ACCESS FOR STAFFING PROFILE page.

Table 3-3. New Kintana 5.0 Access Grants

Category	Access Grant Name	Description
Time Mgmt	Approve Time Sheets	Approve or reject time Sheets when the resource is a direct report or when the Time Sheet has been “DELEGATED TO” the user.
Time Mgmt	Close Time Sheets	Close or freeze Time Sheets when the resource is a direct report or when the Time Sheet has been “DELEGATED TO” the user.
Time Mgmt	Edit Activities	Create, modify and delete Activities in the ACTIVITIES WORKBENCH.
Time Mgmt	Edit Charge Codes	Create, modify and delete Charge Codes in the CHARGE CODES WORKBENCH.
Time Mgmt	Edit Override Rules	Create, modify and delete Override Rules in the OVERRIDE RULES WORKBENCH.
Time Mgmt	Edit Time Mgmt Settings	Edit Time Management settings for a user in the TIME MGMT SETTINGS WORKBENCH. Also enables the TIME MANAGEMENT SETTINGS button in the USER window.
Time Mgmt	Edit Time Sheets	Edit Time Sheets when the resource is a direct report or when the Time Sheet has been “DELEGATED TO” the user.
Time Mgmt	Edit Work Allocations	View and edit Work Allocations. The user can also close or delete allocations he created.
Time Mgmt	Manage Work Allocations	View, edit, delete and close any Work Allocation.
Time Mgmt	View Activities	View Activities in the ACTIVITIES WORKBENCH.
Time Mgmt	View Charge Codes	View Charge Code definitions in the CHARGE CODE WORKBENCH.
Time Mgmt	View Override Rules	View Override Rules in the OVERRIDE RULES WORKBENCH.
Time Mgmt	View Time Mgmt Settings	View Time Management settings for a user in the TIME MGMT SETTINGS WORKBENCH. Also enables the TIME MANAGEMENT SETTINGS button in the USER window.
Time Mgmt	View Time Sheets	View a user's Time Sheet information.
Time Mgmt	View Work Allocations	View Work Allocations in Kintana.

Table 3-4. New 4.6 Access Grants

Category	Access Grant Name	Description
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Table 3-4. New 4.6 Access Grants

Deliver	Manage Releases	<p>Allows users with this Access Grant to:</p> <ul style="list-style-type: none"> • Create a Release • Be designated as the Release Manager in the Release window • Edit or delete any Release in Kintana (regardless of whether they are specified as the Release Manager in the Release Management window).
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Table 3-5. New 4.5 Access Grants

Category	Access Grant Name	Description
Config	Override Data Segmentation	For the user with this grant, disables any data restriction configured in the system, including fields for Assigned User, Group, and Contacts.
Create	View All Contacts in Request	Allows users to see all Contacts in a Request even if a Company is associated with that Request and the field has been configured for data restriction.
Dashboard	Edit Default User Homepage	Enables users to set a default Home page for all Kintana users.
Dashboard	Edit Portlet Definition	Enables users to create and edit portlet definitions.
Dashboard	View Portlet Definition	Enables users to view portlet definitions.
Deliver	Override Participant Restriction	Enables users to use Deliver as though no Participant restrictions are imposed.
Sys Admin	Ownership Override	Enables users to access configuration entities even if they are not a member of the entities' Ownership groups.

The following access grants have been changed:

Table 3-6. Modified 4.6 Access Grants

Category	Access Grant Name	Description
Deliver	Edit Releases	<p>In Kintana 4.6, this functionality was expanded to allows users with this Access Grant to:</p> <ul style="list-style-type: none"> • View any Release • Be designated as the Release Manager in the Release window • Create Releases • Edit or delete any Release that they created • Act on any Distribution Workflow steps where they are included in the step's security. • Edit or delete a Release that they did not create (only when they are designated as the Release Manager in the Release window).
Deliver	View Releases	<p>Allows the user to view the Release definitions on a read-only basis. Users with this grant can also act on any Distribution Workflow steps where they are included in the step's security.</p>

Table 3-7. Modified 4.5 Access Grants

Category	Access Grant Name	Description
Create	Manage Requests	Enables users to override and/or remove any References on any Request.
Drive	Manage Projects	Enables users to override and/or remove any References on any Project or Task.

Kintana 5.0 Upgrade Impacts

The following sections detail the upgrade impacts related explicitly to the 5.0 release:

- *New License Key is Required*
- *Applying Licenses to Users - REQUIRED ACTION*
- *Rebuilding the Webserver Integration*
- *Additional Configuration Required for IIS Integration*

- *Java Plug-In Required for All Workbench Users*
- *De-support of Browsers and Technology*
- *Removed Kintana Screens and Functionality*
- *User Interface Changes*
- *Changes to Your Kintana Configuration Settings or Data*
- *Notes on Kintana Customizations*
- *Reporting Meta Layer*
- *Solution Upgrade Issues*
- *Database Name Change Backward Compatibility Desupport*
- *Removed Database Tables*

New License Key is Required

Kintana has made significant changes to the licensing scheme. As a result, you need to obtain new license keys from Kintana before running the upgrade.

Kintana's license keys are delivered within a file (`license.conf`) that will be copied into the `<Kintana_Home>/conf` directory. The Kintana upgrade will prompt you for the location of the `license.conf` file and then copy it to the correct directory.

Kintana Solutions and Accelerators are licensed separately. When you purchase a Solution or Accelerator, Kintana will provide you with appropriate license information for those products. The license key information for Solutions will be appended to the `license.conf` file mentioned above. Kintana Accelerators are installed on a site-wide basis. No modifications to the `license.conf` file are required.

Applying Licenses to Users - REQUIRED ACTION

The Kintana upgrade translates existing user licenses to the new licensing model. All existing users with a Suite Power or Suite Standard license will automatically be granted the associated Dashboard license. All other users (i.e. users without a Suite license) will NOT be given a Dashboard license by default.

Dashboard licenses must be assigned to users before they logon to Kintana. If the user logs onto Kintana before they have been assigned a Dashboard license, they will lose their portlets and page personalizations.

These licenses can be assigned using the ASSIGN LICENSES wizard in the SYS ADMIN WORKBENCH. Sufficient dashboard user licenses are delivered to all customers in 5.0 to provide one to each user in their instances.



You must provide appropriate licenses to existing users BEFORE they log on to Kintana. If the user does not have the appropriate license for viewing the Kintana Dashboard, they will lose access to their portlets. This will remove the portlets from their Dashboard and discard any personalizations that they may have configured.

Kintana Solutions are now licensed on a per-user basis. In order to preserve portlet personalizations, users should be granted appropriate licenses and access prior to logging onto Kintana. See [“Solution Upgrade Issues”](#) on page 71 for additional details.

Rebuilding the Webserver Integration

If you have integrated your Kintana server with a third-party web server, you need to rebuild the integration module for the product. Instructions for integrating with an external Web server are provided in the Kintana System Administration guide.

Kintana applications currently support integration with the following:

- Microsoft ISAPI for IIS
- Netscape's NSAPI for Netscape and Sun iPlanet servers
- Apache modules for Apache 1.3.x
- Apache 2.0 (on UNIX only)

Kintana applications provide the necessary binary files for external web servers running on Windows. Kintana applications also provide the source code for external web servers on Unix. Before configuring the web server on a Unix platform, the Kintana Web Server Module must be compiled.



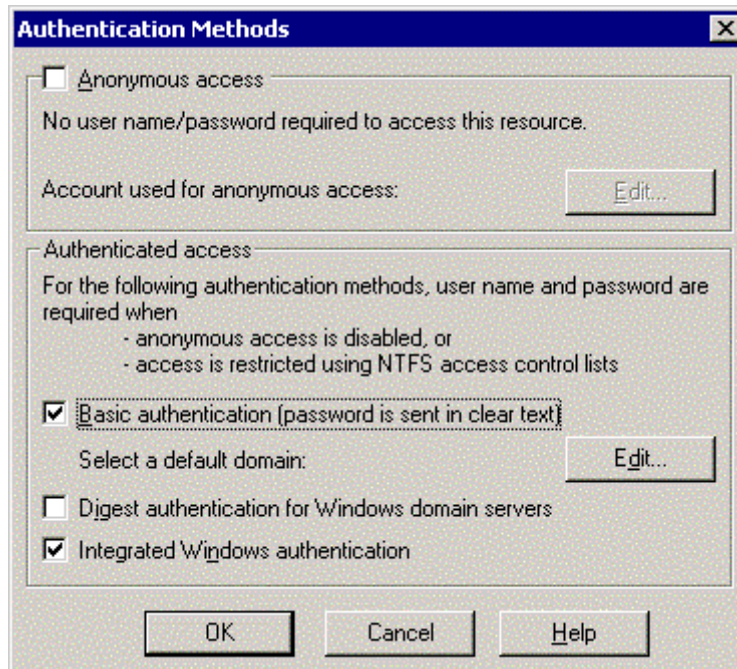
For integrations with IIS, you only need to copy over the dll. Copy isapi_srun.dll from <Kintana_Home>/integration/resin/distributions/resin-win/win-exec to the IIS scripts directory.

For integrations with Apache & iPlanet, you must rebuild the shared library per the instructions in the Kintana System Administration Guide. You must also regenerate and copy over the resin.conf file.

Additional Configuration Required for IIS Integration

If you have integrated the Kintana server with Microsoft ISAPI for IIS and are using the Integrated Windows authentication, you need to configure the following:

1. Create a virtual directory on the IIS server that points to the location of the Kintana jar files. The Kintana jar files are located at <KINTANA_HOME>/html/client.
 - If Kintana and IIS are on the same machine, create a virtual directory on the IIS server that points to the Kintana jar files.
 - If Kintana and IIS are on separate machines:
 - i. Copy the jar files to the IIS file system.
 - ii. Create a virtual directory on the IIS server that points to the new location of the Kintana jar files.
2. Configure the IIS Server. Set the directory security property for the virtual directory in the Authentication Methods window shown below. This must be set to either **ANONYMOUS ACCESS** or **BASIC AUTHENTICATION**.



3. Add the following line to the server.conf file located in the <KINTANA_HOME>/conf directory:

```
com.kintana.core.server.JAR_FILES_URL
```

where JAR_FILES_URL is the URL of the jar files virtual directory created in Step 1.

Java Plug-In Required for All Workbench Users

Kintana requires the Java Plug-in for accessing the Kintana Workbench. Installing the Java Plug-in means that Kintana users are no longer dependent on any specific version of JVM to run Kintana on their Internet browsers. The Java Plug-in is fully compatible with the Kintana client.

The first time Kintana users access the Workbench after the upgrade, Kintana detects whether or not the correct version of Java Plug-in is installed on their computer. If it is not, users are taken through a procedure for installing the Java Plug-in. This procedure only needs to be performed once.

To support this feature, the following server configuration parameters are defaulted in the server.conf file:

Server Parameter Name	Default
JAVA_PLUGIN_VERSION	1.4.1_02
JAVA_PLUGIN_PATH_IE	http://java.sun.com/products/plugin/autodl/jinstall-1_4_1_02-windows-i586.cab
JAVA_PLUGIN_PATH_NS	http://java.sun.com/j2se/1.4.1/

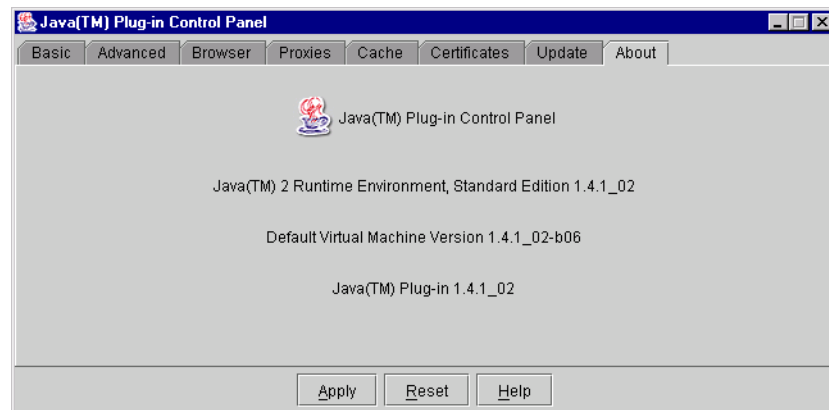
Java Plug-In Defaulting Issues

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

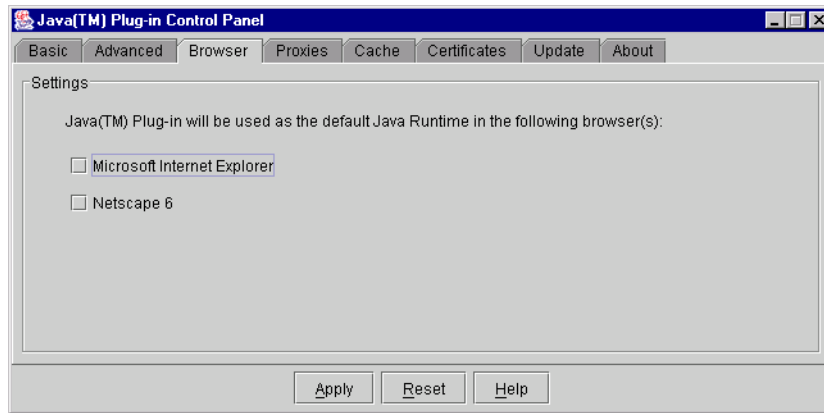
- The Kintana Workbench may throw a “class not found” exception error.
- The user may have other applications requiring different versions of the Java Plug-In.

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.



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.

De-support of Browsers and Technology

Desupport for the following technologies will allow Kintana to leverage the capabilities in later versions of the browsers and JDKs.

Kintana no longer supports the following:

- Netscape 6.x and lower
- Internet Explorer 4.x
- JDK 1.1.x on the server
- Netpack for the Alpha chipset

Kintana will continue to support IE 5.0+, and JDK 1.3.1. Additionally, Kintana will continue to support Netscape Navigator 6.21 on Windows NT. Refer to the Kintana compatibility matrix for a complete list of supported technologies.



Note

To access the Kintana Workbench, the user must have the Java Plug In installed on their machine. This is automatically installed the first time the user accesses the Workbench.

Java Plug In version 1.4.1_02 is required.

Removed Kintana Screens and Functionality

The following screens and functionality are no longer available in Kintana.

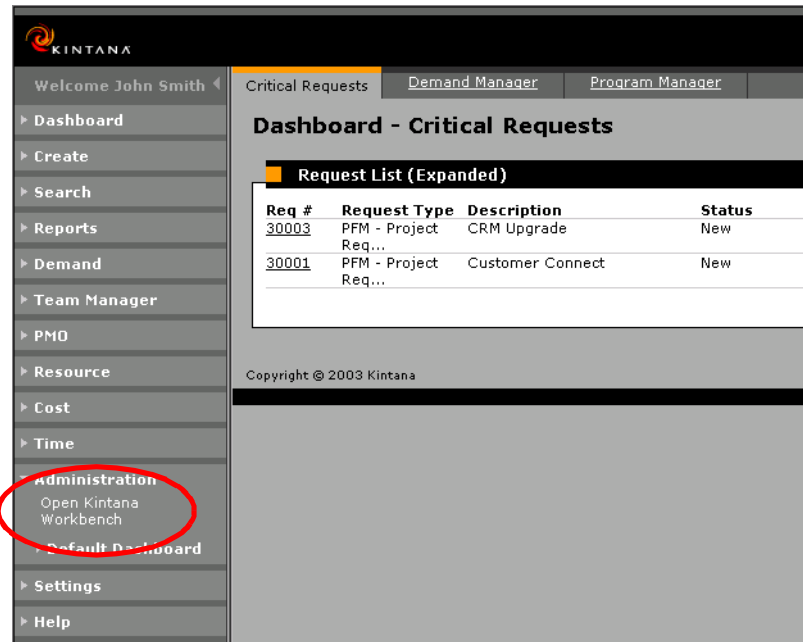
- **Request Workbench:**
All users will now interact with Requests through the Kintana (HTML) Interface. This interface supports the full range of functionality previously offered in the Request Workbench. Moving to a single interface for Request processing simplifies your Request processing, reduces the amount of Workbench training for your organization, and provides a more consistent user experience within Kintana.
- **Request Context Sensitive User Data:**
Context sensitive user data for Requests was only supported in the Request Workbench. With the removal of the Workbench, this functionality is no longer available. You can obtain similar functionality by using Advanced Rules with custom fields on a Request Type.
- **Reference Fields:**
The Reference Fields, previously accessed through the Configuration screen group on the Kintana Workbench is no longer available.

User Interface Changes

Single Logon to Workbench and Kintana Interface

For users who access Kintana through both the standard Kintana (HTML) interface and the Kintana Workbench, a single login will be required to access both interfaces. Previously, users were required to log in to each interface separately.

Users will log onto the Kintana's standard interface. They can then launch the Kintana Workbench using the link on the menu.



Menu and Navigation Enhancements

In Kintana 5.0, the results of comprehensive usability studies have been incorporated in enhancements to navigation and user experience in the Kintana Interface. The current drop-down menus have been moved to sidebar navigation providing the user with vastly improved primary navigation context. The sidebar automatically remembers users' preferences, enabling them to easily perform common actions. In addition, a top navigation path has been added to give users better visibility to their path through the application and one-click navigation to return to previous screens.

Kintana recommends educating your users on these changes when rolling out the upgraded version of Kintana to your user base.

Changes to Your Kintana Configuration Settings or Data

To enable the new features introduced in Kintana 5.0, the upgrade needs to make some changes to your Kintana data. This includes modifying:

- *Project Data*
- *Security Group Membership and Access Grants*

- *References in Projects, Requests and Packages*

Project Data

The following sections discuss the impacts to Kintana Drive Project data. Consider reviewing these impacts with Project Managers at your site to determine the level of impact from these changes before upgrading.

- *Conversion of Hours in a Working Day*
- *Conversion of Project Effort Data*
- *Division of Effort Between Multiple Resources*
- *Renaming of Project State from “Plan” to “On Hold”*

Conversion of Hours in a Working Day

Prior to 5.0, Kintana Drive assumed that a standard working day was 10 hours. Kintana now supports configuration of the standard working day.

During the upgrade, you will be prompted to enter the number of working hours in a day (default will be 8). This will not alter the schedule of existing tasks and will keep the duration of the tasks proportionally the same to the new working day as they were to 10hrs/day setting. For example, when upgrading to an 8-hour working day, a 1-day long task will remain 1-day long, but will be displayed as 8 hours rather than 10 hours.

Note

Kintana’s Time Management Solution utilized the following setting in the server.conf file to establish the hours in a working day: `WORKDAY_HOURS`. Since Kintana now supports a configurable working day, the parameter introduced for that purpose is no longer necessary. When upgrading, if the parameter exists, it will be used to set the working day and then removed from server.conf file.

Conversion of Project Effort Data

The Drive product offers users the ability to track effort as a property of tasks and projects. Prior to 5.0, this field was internally assumed to contain values in days, but there was no real indication to the user (or enforcement) of any particular units for effort. Further investigation revealed that many customers preferred to track their Effort data in hours, rather than days.

To conform to customers expectations, Drive's Effort and Duration fields will be converted to hours and days, respectively. To accomplish this, Kintana has:

- Added the “hours” and “days” labels to all relevant reports, portlets, tables, and forms in the interface, so that effort's units are clearer to the user.
- Added a step to the upgrade process which will give the option to convert Project effort fields from days to hours.
- Provided a stand-alone script which can be used to convert individual Drive Project Effort data from days to hours.

The conversion will also retroactively convert the default Effort values for projects with un-tracked hours. This will allow upgrading customers to easily begin using the new 5.0 project management tools.



Note

Kintana Administrators should coordinate this upgrade activity with Project Managers currently using Kintana Projects. This step can have a significant impact to users currently tracking project Effort in days.

In most cases, the upgrade will handle the data conversion without requiring any additional information or actions from the users. In the case where **EFFORT UNITS VARY FROM PROJECT TO PROJECT**, some additional manual conversions will be required.

Conversion Details:

The Project Effort data conversion takes into account the following factors before performing the actual conversion:

- Whether Effort data is being used on any Project:
The upgrade will check the database to see if any Effort data exists in the system. If no Effort data exists, the upgrade will create effort data from task durations. This change will be transparent to the administrator running the upgrade. If effort data is being used, the upgrade will prompt the user for additional information on how effort data is being used at their site.
- Answer to a prompt during the upgrade.
During the upgrade, you need to specify how effort data is being used at your site. You can choose one of the following:
 - **EFFORT DATA IS ALWAYS MEASURED IN HOURS**
Result: Effort data will be converted based on [Table 3-8](#).

- **EFFORT DATA IS ALWAYS MEASURED IN DAYS (MOST COMMON)**
Result: Effort data will be converted based on [Table 3-8](#).
- **EFFORT UNITS VARY FROM PROJECT TO PROJECT**
Result: Effort data will be converted based on [Table 3-8](#) if the majority of projects do not track effort. Otherwise, the conversion step will be skipped. You can later run a conversion on the individual Projects.
- Synchronization mode for integrating Kintana Projects with Microsoft Projects (Kintana Drive controlled, Microsoft Project controlled, Kintana Drive controls actuals)

The following table details the multiple scenarios that can be encountered during the conversion. This table assumes that some effort data exists in your system.

If you select **EFFORT UNITS VARY FROM PROJECT TO PROJECT** the conversion will be skipped. You can run the conversion tool later on a project-by-project basis. To run the conversion tool after the upgrade, run the following script:

```
<KINTANA_HOME>\bin\kConvertProject.sh
```

You will need to know the following information to complete the conversion:

- Master Project ID or Master Project Name
- The Kintana username of the user running the update
- The units used for the Effort fields in the Master Project (either DAYS or HOURS, usually DAYS).
- The database password for \$SCHEMA_USER

Table 3-8. Effort data conversion scenarios.

Drive Project Setting			Answer to Prompt During Upgrade		
			Effort data is always measured in hours	Effort data is always measured in days (most common)	Effort units vary from project to project
Kintana Controls Project	Scheduled Effort	On	No Change	Multiply by number of hours in a working day.	Skip the project and provide a warning.
		Off	Multiply scheduled duration by resources and number of hours in a work day.		
	Actual Effort	On	No Change	Multiply by number of hours in a working day.	Skip the project and provide a warning.
		Off	If task is complete, use scheduled effort value. If field value is null, no change. Otherwise, use the below conversion rules.		
	Estimated Effort Remaining	On	No Change	Multiply by number of hours in a working day.	Skip the project and provide a warning.
		Off			
Kintana Controls Actuals	Scheduled Effort	On	Multiply by number of hours in a working day.		
		Off	Multiply duration by resources and number of hours in a work day.		
	Actual Effort	On	No change	Multiply by number of hours in a working day.	Skip the project and provide a warning.
		Off	If task is complete, use scheduled effort value. If field value is null, no change. Otherwise, use the below conversion rules.		
	Estimated Effort Remaining	On	No Change	Multiply by number of hours in a working day.	Skip the project and provide a warning.
		Off			

Table 3-8. Effort data conversion scenarios.

Drive Project Setting			Answer to Prompt During Upgrade		
			Effort data is always measured in hours	Effort data is always measured in days (most common)	Effort units vary from project to project
MSP Controls Project	Scheduled Effort	On	Multiply by number of hours in a working day.		
		Off	Multiply duration by resources and number of hours in a work day.		
	Actual Effort	On	Multiply by number of hours in a working day.		
		Off	If task is complete, use scheduled effort value; otherwise multiply by number of hours in a work day.		
	Estimated Effort Remaining	On	Multiply by number of hours in a work day, if a value exists; otherwise, no change.		
		Off			

** On and Off setting are specified in the PROJECT SETTING window. The Kintana upgrade checks the database to automatically determine this setting.



Note

If a project originally tracked Effort, but then later the Effort column was disabled, your effort data will be overwritten. Discuss with your project managers, how they track effort before converting the data. If any project managers have disabled the effort column, but would like to retain the data for future reference, they should re-enable the effort data columns using the PROJECT SETTINGS window before the upgrade is run.

Division of Effort Between Multiple Resources

Because task resource assignments (bookings) now include an effort breakdown, the upgrade will divide the total task scheduled effort equally among the assigned resources. For instance, if a task is assigned to 2 resources, and it is marked as 8 hours of scheduled effort, then each resource will get 4 hours of effort for their booking.

Renaming of Project State from “Plan” to “On Hold”

The project state “Plan” has been renamed to “On Hold” to reduce user confusion related to the state. Projects in the “On Hold” state will continue to behave as specified below.

Table 3-9. Project States and Descriptions

Project State	Behavior	Application
On Hold	Projects and their Tasks are displayed in My Tasks and the Dashboard but cannot be edited. Notifications are not sent and Exceptions are not triggered. Hierarchy can be modified.	This state allows a Project Manager to manipulate the Project (such as changing project hierarchy and revising predecessors). This state informs Participants and other Managers that a rework is being done.

Security Group Membership and Access Grants

A number of Access Grants were introduced to control access to new 5.0 functionality. The upgrade automatically grants some of these Access Grants to existing security groups, based on which grants the security group already had. The following table details which access grants will be automatically added to security groups.

Table 3-10. Access Grants Given to Existing Security Groups

Access Grant	Given to Security Groups Containing:
Resource Mgmt: Edit info on any resource I manage	<ul style="list-style-type: none">• Drive: Manage Projects, or• Create: Manage Requests
Resource Mgmt: Edit all resources	<ul style="list-style-type: none">• Sys Admin: Edit Users
Resource Mgmt: View Organization	<ul style="list-style-type: none">• Drive: Manage Projects, or• Create: Manage Requests
Resource Mgmt: Edit organization units I manage	<ul style="list-style-type: none">• Drive: Manage Projects, or• Create: Manage Requests
Resource Mgmt: Edit entire organization	<ul style="list-style-type: none">• Sys Admin: Edit Users, and• Sys Admin: Edit Security Groups

Table 3-10. Access Grants Given to Existing Security Groups

Access Grant	Given to Security Groups Containing:
Resource Mgmt: Edit all skills	<ul style="list-style-type: none"> • Sys Admin: Edit Users, or • Drive: Manage Projects, or • Create: Manage Requests
Resource Mgmt: Edit staffing profiles	<ul style="list-style-type: none"> • Drive: Manage Projects
Resource Mgmt: Manage staffing profiles	<ul style="list-style-type: none"> • Drive: Manage Projects
SysAdmin: Edit Dependent References	<ul style="list-style-type: none"> • Drive: Manage Projects • Create: Manage Requests



Note

Any new access grant that is not included in the above table will have to be manually added to security groups.

References in Projects, Requests and Packages

Release 5.0 has introduced new dependent relationships between Requests, Tasks, and Packages. These changes will be visible to users when viewing the relationship descriptions on references. These changes are informational only and will not alter any existing transactional data in the system.

- The CREATE PACKAGE AND WAIT steps will now use the “Package Updates Request Process step” relationship.
- Kintana 5.0 has also removed a few relationships. Since all of the relationships that were removed are informational, the relationship will be updated to Related Relationships.

See the following Kintana documents for additional details on Reference and Reference Relationship functionality:

- ["Processing Requests"](#)
- ["Processing Packages"](#)
- ["Working with Projects"](#)

Notes on Kintana Customizations

Customized JSP Pages (DateField component)

Customized JSP pages that made use of the date component tag `CrtDateField` now just need to use the standard `DateField` component tag. All products now handle the date field in the same way. Any occurrence of `CrtDateField` in custom JSP pages should be replaced with `DateField`. The `DateField` works just like the deprecated `CrtDateField` so no other code changes are required.

Custom Portlet Hovers

Previous to 5.0, custom portlet hovers were not escaped correctly. 5.0 has fixed this problem but the fix requires changes to custom portlets that provided HTML formatted hovers. In order to pass formatted HTML directly to hover in 5.0 you must pre-pend the hover text with “<!--HTML-->”. Hover text that is preceded with this string will not be escaped by the Kintana server and passed directly to hovers. For example previous to 5.0 you could perform the following in a custom portlet:

```
select '<b>email:</b>' || u.email_address as hover_col
```

In 5.0 you need to use the following:

```
select '<!--HTML--><b>email:</b>' || u.email_address as  
      hover_col
```

When using the “<!--HTML-->” directive, you are responsible for escaping HTML special characters in the template text.

Custom Budget, Profiles and Resource Pool Fields are Not Supported

The upgrade does not support custom Budget, Staffing Profile, or Resource Pool field components implemented in consulting engagements prior to release 5.0. The users who have these custom implementations must reconfigure the Request Type fields after upgrade. Contact Kintana Support or Customer Value for additional details.

Custom Costing Solutions are Not Supported

The upgrade does not support customized costing solutions that were implemented in consulting engagements prior to release 5.0. Contact Kintana Support or Customer Value for additional details.

Custom Menus

Customized Solution menus will be copied during the upgrade. The custom changes will need to be re-applied manually to the new menu structure in the Kintana interface. See the "[Customizing the Kintana Interface](#)" document for additional details.

Reporting Meta Layer

The following Reporting Meta Layer views have been altered. Queries or custom reports using any of these views could be impacted by modified or removed views.

Views that have been modified:

- MPKG_PACKAGES
- MPRJ_TASK_INFO
- MREQ_REQUEST_TYPE_NAME
- MREQ_REQUEST

Views that have been removed:

- MREQ_UD_[Context Value]

New views:

- MREQ_TABLE_COMPONENT
- MPRJ_BASELINE_INFO

Solution Upgrade Issues

Below are upgrade issues related to Kintana Solutions.

Demand Management

Kintana's Demand Management Solution is now licensed on a per-user basis. Additionally, Kintana has introduced a new Access Grant that controls access to Demand Management menus and functionality. To enable users to continue using Kintana's Demand Management functionality, you will need to perform the following actions after the upgrade:

- Assign a Demand Management license to each user that needs to access the functionality.
- Associate users with the Manage Demand Access Grants (add the grant to a security group and associate the appropriate users with the security group)

The upgrade will also modify some of your configuration data. 5.0 will analyze your current demand management configuration and from that create a default demand set. This will cause some changes to occur in your Request Type definitions. For example, the layout may be altered, fields may be renamed, new fields may appear, etc. Consequently, your end-users may notice changes when creating or processing demand of these Request Types.

See the Demand Management documentation for additional upgrade impact documentation and for instructions on configuring Kintana to manage your demand.

Program Management Office (PMO)

Kintana's PMO Solution is now licensed on a per-user basis. To enable users to continue using Kintana's PMO functionality, you need assign a PMO license to each user that needs to access the functionality.

The upgrade will also modify some of your configuration data; in particular, your Request Types. 5.0 will analyze your current PMO configuration and from that update your configuration to utilize new functionality. End users will not notice a difference, but the methods for modifying your configuration will change. See the PMO documentation for configuration instructions.

Time Management

Below are upgrade impacts related to Time Management.

Removal of the WORKDAY_HOURS Server Parameter

The WORKDAY_HOURS server parameter was previously used by the Kintana Time Management Solution. Since Kintana now supports a configurable working day, the parameter introduced for that purpose is no longer needed. When upgrading, this parameter will be used to set the working day and then removed from server.conf file.

Licenses Applied on a per-User Basis

Kintana's Time Management Solution is now licensed on a per-user basis. To enable users to continue using Kintana's Time Management functionality, you

will need to assign a Time Management license to each user that needs to access the functionality.

Data Model Change Could Result in Broken Customizations

All tables with TRC in their names have been renamed to KTMG for 5.0. This may affect any customized Validations or portlets.

Additionally, the table TRC_RESOURCES no longer exists. It has been replaced by KTMG_RESOURCE_SETTINGS.

Database Name Change Backward Compatibility Desupport

In Release 4.0 we changed the data model to reflect company and product name changes. Prior to Release 4.0, naming conventions for Kintana Products in the data model utilized a prefix 'CLxx', where xx represented product or entity abbreviation. The prefix CL was derived from Kintana's former name Chain Link Technologies, Inc.

Kintana maintained a set of database views to enable backwards compatibility with the pre-4.0 data model. These views are no longer supported in Kintana. Refer to the Kintana 4.0 Upgrade Guide for additional details.

Removed Database Tables

Kintana 5.0 has deprecated the following database tables. These tables should no longer be used for custom queries or reports.

CLRI_ISSUES_EXTN_INT

CLRI_ISSUES_INT

KDRV_PENDING_STATE_CHANGES

KNTA_ENTITY_REFERENCES

KNTA_FIELDS

KNTA_MENUS

KNTA_USER_PAGE_TAB_MENUS

Kintana 4.6 Upgrade Impacts

The following sections detail the upgrade impacts related explicitly to the 4.6 release:

- [*Release Management Upgrade Impacts*](#)
- [*New Required Tablespace*](#)
- [*De-support Java Plug-in version 1.3.1_01*](#)
- [*De-support of Migrations through RMI Connections*](#)
- [*Validation Special Characters*](#)
- [*Kintana Migrator Impacts*](#)
- [*Spaces in Directories*](#)
- [*Java Plug-In Cache and Microsoft Project Integration*](#)

Release Management Upgrade Impacts

The Kintana Release Management functionality and data model have been significantly altered to support a more robust and usable Release Management solution. Due to the level of change (data model and configuration), upgrading your Kintana Release Management data and functionality may require a large amount of manual conversion.



The 4.6 upgrade will preserve all of your Release Management historical data. However, your current Release Management configuration will not work without modifying your Workflows.

If you are currently using Release Management functionality, we strongly recommend that you work with Kintana Support when upgrading to 4.6.

The following sections summarize some of the larger changes implemented in 4.6 Release Management and outline the changes automatically made to your Release Management configurations when you run the 4.6 upgrade. For detailed information on reworking and reenabling your Release Management system in Kintana, contact Kintana Support.

- [*Release Management Upgrade: Background Information*](#)
- [*Historical Data*](#)

- *Impacts to Workflows*
- *All Release Distributions Must Be Closed -- Required Action.*

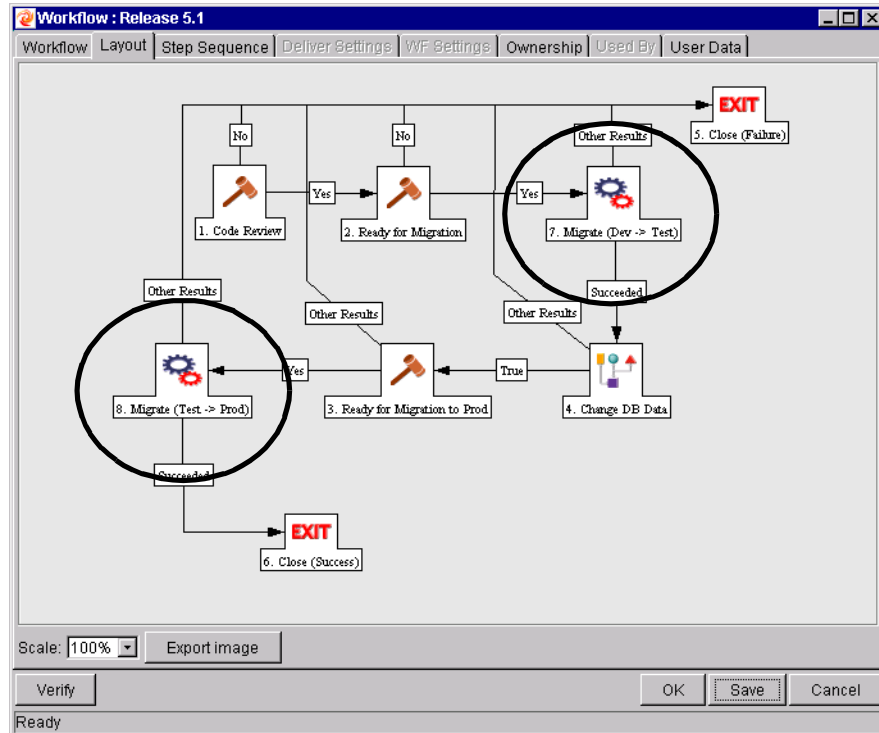
Release Management Upgrade: Background Information

In order to support comprehensive Distribution and Package processing from the Release screen, Kintana implemented a new Workflow Scope: “Release Distributions.” You can now use two levels (scopes) of Workflows to process a Release Distribution:

- **Release Distributions:** Defines the overall release distribution process. Can include two types of Subworkflows: Distribution-Level and Package-Level. Release Distribution Workflows can be used to:
 - o Perform approvals
 - o Execute system commands such as: starting and stopping servers, compiling code, signing archives, etc.
- **Package-Level Subworkflows:** Used to process the Package Lines included in a Release. They can be used to:
 - o Process Package Lines through a standard Release process
 - o Execute Object Type commands
 - o Deploy software changes defined at the Package Line level

This is a significant change to the Release Management set-up in Kintana. Previously, a single Deliver Workflow could be used to process a Distribution. But because Package-level processing is now restricted to the Package level Subworkflows, the old Distribution (Deliver) Workflow will not work without modifying your configuration.

For example, consider the following Deliver Workflow used to process Distributions in Kintana 4.5. Any step that was used to process Package Lines (circled execution steps) would have to be converted to a Package-level Subworkflow.



Existing Deliver Workflows used in Release Distributions will be altered to fit into this new scheme.

Historical Data

Historical release management data is preserved. The upgrade will convert all historical data into the new data model. However, there is no attempt to use any “smart” logic to make the data work in 4.6. This means that users will have access to the historical information, but they will not be able to rerun any of their old distributions.

The following behavior can be observed following a 4.6 upgrade:

- Users cannot re-execute old distributions.
- The historical data will be viewable.
- All transaction history will be kept.
- Execution logs will still be viewable.



All distributions must be closed before conversion. If the upgrade is attempted before all distributions are closed, it rolls back and requires that the user close the distributions.

Impacts to Workflows

Workflows used by distributions will be converted in the upgrade. Please note that if a workflow is not used by any distributions when the conversion occurs, the workflow will be designated as a Package Workflow. You would then not be able to use this Workflow to process Distributions.

For every workflow that is used by a distribution the following will exist after the conversion:

- **Original** - it is untouched and the scope is set to package workflow. More generically, all workflows that are Kintana Deliver scope will be changed to package scope. This is actually not “changing” the value of the scope, but the scope is being renamed.
- **[Obsolete Dist] WFNAME** - Since there is a distribution using the original workflow, this workflow is a copy of that original workflow. All distributions using the original workflow are modified to use this workflow. This workflow is kept in order to allow the historical data to have access to the workflow under which the data was created. It cannot be deleted unless all distributions that used this workflow are also deleted. This workflow is disabled, and if it was enabled it would not function due to the invalid workflow steps.
- **[DIST] WFNAME** - a copy of the original workflow, with scope set to distribution. All valid distribution workflow steps are set to distribution scope. Steps that are not valid distribution workflow steps are removed - this may result in lost transitions. Steps that are object command executions are removed, and replaced with package level sub-workflow steps. This workflow is enabled. The following steps are not allowed in distribution workflows:
 - o Workflow Jump
 - o Workflow Receive
 - o Ready for Release
 - o First Line

- o Last Line
- o Synch
- **(Obsolete DIST) Sub-workflow - SUBWF_ID**
 For each execution step (manual or immediate), a package level sub-workflow is created. These workflows are package level sub-workflow, and contain the original execution step, and a return step. The “SUBWF_ID” is the workflow id of the sub-workflow, because there may be many of these sub-workflows created for the same distribution workflow.

All Release Distributions Must Be Closed -- Required Action.

Customers who have implemented Kintana’s Release Management functionality at their site need to perform an additional step before running the Kintana upgrade. If you do not use Kintana’s Release Management, you can skip this section.

All Release Distributions must be closed before the Kintana upgrade can be run. To help you determine which Distributions are still open, the Kintana upgrade includes scripts for querying and deleting Distributions. These scripts can be found in the `upgrade_500/preupgrade/RM46` directory.

To obtain a list of open Distributions that need to be closed before upgrading run the following command:

```
> sqlplus <knta_user>/<knta_password>@<sid>
open_dist_by_release.sql
```

This script lists the DISTRIBUTION_ID for all open distributions. Use this ID to locate, open and close the Distributions in the Kintana Workbench.



Known Issue (Kintana Request # 121026):

Some customers have encountered Distributions that can not be opened in the Kintana Workbench. These Distributions prevent them from upgrading to Kintana 5.0. Kintana includes a script (delete_dist.sql) for deleting these Distributions.

Note: This script should ONLY be used when a Distribution cannot be closed using the Workbench.

To correct this problem:

1. First, obtain the Distribution IDs of the Distributions that can not be closed using the Workbench, by running:
2. Next, run the following command for each Distribution that you want to delete:

```
> sqlplus <knta_user>/<knta_password>@<sid> open_dist.sql
```

```
> sqlplus <knta_user>/<knta_password>@<sid> delete_dist.sql  
<DISTRIBUTION_ID>
```

This command will delete the Distribution from the database and allow the upgrade to complete.

New Required Tablespace

Kintana now uses a CLOB tablespace to handle large Notification objects. Kintana recommends creating a 100 MB CLOB tablespace (for a small installation).

Database requirements depend highly on the number of users, types of processes implemented, and type of activity performed. Refer to the "[Kintana System Administration Guide](#)" document for more information.

De-support Java Plug-in version 1.3.1_01

Kintana no longer supports version 1.3.1_01 of the Java plug-in. If you are using the plug-in to access the Kintana Workbench, download and install version 1.3.1_02. This is available from Sun's web site.

De-support of Migrations through RMI Connections

Migration of entities between two Kintana instances typically occurs by extracting a zip file from the source server, copying it to the destination server, and executing an import locally from that server. By defining an RMI URL on the Kintana server environment, it was possible to make a direct connection to the instance without logging into the server using telnet or SSH. Defining environment user data with a token name of “RMI_URL” enabled this feature for all environments, regardless of whether a URL was specified for the environment or not.

Reason for De-support

For direct RMI connections between server instances to work, it is required that both Kintana servers use the same encryption keys for encrypting and decrypting their passwords. Because it is not advisable to share security configuration between servers, typically, servers will use different encryption keys. This leads to error messages indicating an incorrect password when trying to perform migrations. Since Kintana cannot securely perform migrations over RMI, and there is a secure alternative, the migration special commands will no longer support this feature in Kintana 4.6.

Upgrade

All environments defined for Kintana servers that currently migrate through RMI connections will be required to have the necessary information to transfer files and make shell connections specified within the environment. The environments used for migration will require the connection protocol, transfer protocol, username, password, and base path of the Kintana server instance, as defined in the “Kintana Migrators” advanced configuration guide. If this information exists on the environments, migrations will continue to work after upgrading to Kintana 4.6 without error.

Validation Special Characters

The Validation Name field for all Validations cannot contain a question mark (?). The Kintana Workbench prevents this character from being entered into the field, but all previously configured Validation Names should be checked and corrected.

Kintana Migrator Impacts

The Kintana 4.6 upgrade introduces changes to the commands within Migrator Object Types. To guarantee that Kintana migrations are successful, we recommend that you:

- Close all Distributions before beginning the upgrade. No Release Distributions should be open after upgrade.
- Following upgrade, make copies of all Reference Migrator Object Types and enable the copies for use. If modifications were made to your pre-upgrade Migrator Object Type Commands and Command Conditions, compare and incorporate these changes into the new post-upgrade Migrator Object Type copies' Commands and Command Conditions. The following is a list of the Reference Migrator Object Types:
 - o (REFERENCE) Kintana Object Type Migrator
 - o (REFERENCE) Kintana Portlet Migrator
 - o (REFERENCE) Kintana Project Template Migrator
 - o (REFERENCE) Kintana Report Type Migrator
 - o (REFERENCE) Kintana Request Header Type Migrator
 - o (REFERENCE) Kintana Request Type Migrator
 - o (REFERENCE) Kintana Special Command Migrator
 - o (REFERENCE) Kintana User Data Context Migrator
 - o (REFERENCE) Kintana Validation Migrator
 - o (REFERENCE) Kintana Workflow Migrator
- Do not copy Package Lines from pre-upgrade Migrator Object Types when creating new Packages.

Spaces in Directories

Kintana cannot be installed into a directory path whose name contains a space. You may experience problems with Object Types, Reports, and Accelerators if the directory path Kintana is installed into contains a space.

Java Plug-In Cache and Microsoft Project Integration

If you were using the Java Plug-In to run the Kintana 4.6 Workbench, you need to clear the Plug-In's JAR cache after upgrading to 5.0 if you want Microsoft Project integration to work correctly.

After upgrading to Kintana 5.0:

1. Go to your **START** menu and select **START -> SETTINGS -> CONTROL PANEL**.
2. Open the Java Plug-In control panel and click the **CACHE** tab.
3. Click **CLEAR** to clear the Plug-In Cache.

The next time you access the Kintana 5.0 Workbench, the correct JAR files will be cached and Microsoft Project integration will work correctly.

Kintana 4.5 Upgrade Impacts

Kintana 4.5 introduces a number of new features that improve the users' interactions and overall Kintana system performance. To facilitate these new features, we have updated the Kintana data model and have selected alternate technologies which help us deliver the best Kintana solution. The following sections outline these changes and provide any required instructions for performing a successful upgrade. Following the instructions below will ensure the integrity of your current Kintana data and configurations.

- [*Microsoft Project Schema*](#)
- [*LDAP Integration*](#)
- [*Portlet WHERE Clause Upgrade*](#)
- [*Validation Special Characters*](#)
- [*Deprecated RML Views*](#)
- [*Multi-Server Manager Replaced*](#)
- [*Java Plug-In Cache and Microsoft Project Integration*](#)

Microsoft Project Schema

Kintana Drive 4.5 no longer uses a separate database schema for the integration with Microsoft Project (MS Project). If an MS Project schema exists it is recommended that you drop it since it will no longer be used.

If you have an MS Project schema, it is listed in the \$KINTANA_HOME/server.conf file as the com.kintana.core.server.MSP_SCHEMA_NAME parameter.

You must connect as a user with SYSTEM-level access in order to drop the MS Project schema. Be sure that you drop the MSP schema and *not* the Kintana schema.

LDAP Integration

The following changes have been made to the Kintana User Open Interface's LDAP integration for Kintana 4.5:

- *New LDAP Attribute File*
- *Extra LDAP Attributes for Netscape, Active Directory, and Novell*
- *Run Kintana User Interface Report Replaced*

New LDAP Attribute File

The LDAP attribute file for Kintana 4.5 is new, and contains many new parameters. The pre-4.5 LdapAttribute.conf file will be renamed with a “.old” extension during upgrade.

Extra LDAP Attributes for Netscape, Active Directory, and Novell

Kintana 4.5 includes LDAP attribute files for integration with Netscape, Active Directory, and Novell. If you wish to use these files for LDAP integration, first remove or rename the current LdapAttribute.conf file and replace it with the desired one.

The default LdapAttribute.conf file contains all parameters for Netscape; the default file and Netscape files are identical.



Note

If the old `LdapAttribute.conf` file included any custom parameters, you will need to re-enter them into the Netscape, Active Directory, or Novell attribute file you are replacing it with.

The default `LdapAttribute.conf` file will contain Netscape parameters. If you are using something other than Netscape, you will need to remove or rename the default `LdapAttribute.conf` file and replace it with the desired one.

Run Kintana User Interface Report Replaced

During upgrade, the Run Kintana User Interface Report Type will be copied and renamed to 'Disabled Pre-4.5 Run Kintana User Interface' before it is replaced with the 4.5 Report Type. This allows you to retain a copy of the pre-4.5 Report Type.

We recommend that you copy the pre-4.5 Run Kintana User Interface Report Type before upgrade and rename it on your own, so you can keep track of it.

Portlet WHERE Clause Upgrade

Portlets in the Kintana Dashboard use SQL queries to obtain data to display. These queries are updated during upgrade using a script that checks and alters the queries' WHERE clauses. If your Kintana Administrator or another authorized user has made changes to your existing portlet queries' WHERE clauses, the upgrade will not take effect. The portlets will continue to work, but will not reflect new functionality for Kintana 4.5.

For questions related to this issue, contact Kintana Support at <http://www.contori.com>.

Deprecated RML Views

Two views in the Kintana Reporting Meta Layer (RML) have been deprecated:

1. `RML_REQUEST_PARTICIPANTS`
2. `RML_PACKAGE_PARTICIPANTS`

Reporting tools using the Kintana Reporting Meta Layer (RML) should be changed to use the following views instead:

1. `KCRT_PARTICIPANT_CHECK_V`
2. `KDLV_PARTICIPANT_CHECK_V`

Multi-Server Manager Replaced

Prior to 4.5, Kintana used a server manager in multi-server instances to distribute load. The new failover model replaces the server manager with a peer-to-peer model. Previous code connected to the server manager with the server manager URL and requested a stub to the Kintana server. In a Kintana 4.5 cluster, a server looks up a list of URLs for all Kintana servers in the cluster and picks out one of them.

If you have written your own clients or scripts that use the server manager, you will need to change your custom code.

Java Plug-In Cache and Microsoft Project Integration

If you were using the Java Plug-In to run the Kintana 4.5 Workbench, you need to clear the Plug-In's JAR cache after upgrading to 5.0 if you want Microsoft Project integration to work correctly.

After upgrading to Kintana 5.0:

1. Go to your **START** menu and select **START -> SETTINGS -> CONTROL PANEL**.
2. Open the Java Plug-In control panel and click the **CACHE** tab.
3. Click **CLEAR** to clear the Plug-In Cache.

The next time you access the Kintana 5.0 Workbench, the correct JAR files will be cached and Microsoft Project integration will work correctly.

Accelerator Impacts

The following sections provide an overview of general Accelerator-related upgrade impacts. Refer to the individual Accelerator document for more details on any upgrade impacts specific to that Accelerator.

- [*General Accelerator Upgrade Impact*](#)
- [*Custom Dashboard Menus*](#)

General Accelerator Upgrade Impact

The Accelerator upgrade will replace the reference Accelerator content. This is content that is not editable and that start with (REFERENCE). Content that is editable by the customer will not be replaced. This is so customizations will not be lost. Your current non-reference content might need to be re-configured to take advantage of new functionality. See the sections below for a discussion of the Accelerators licensed at your site.

Custom Dashboard Menus

Some Kintana Accelerators included custom Dashboard Templates that provided quicker access to your Kintana data. These Templates included a menu that appeared on the Dashboard page. Any customizations to this menu will not be preserved through the upgrade. To enable these customizations in the new menu structure in the Kintana interface, you can:

- Reapply the customizations to the new menu structure. See [*"Customizing the Kintana Interface"*](#) for details.
- Follow a simple procedure to transfer your customizations. See [*"Customizing the Kintana Interface"*](#) for details.

Chapter 4 Upgrade Process

Introduction

This chapter provides detailed instructions for upgrading the Kintana software to release 5.0. It also discusses upgrade requirements and special considerations regarding the 5.0 upgrade utility. See the following sections for details:

- *Upgrade Requirements*
- *Special Considerations for the 5.0 Upgrade*
- *Upgrading to Release 5.0*
- *Verify the Upgrade*
- *Optional Post-Upgrade Activities*



Note

Customers upgrading to Kintana version 5.0 will follow a different upgrade path, depending on their current Kintana version:

Current Version	Through Version	Final
Kintana 3.x (or earlier) **	-----> 4.0	-----> 5.0
Kintana 4.0	----->	5.0
Kintana 4.5	----->	5.0
Kintana 4.6	----->	5.0

** If you are currently on any 1.x release of Apps*Integrity, you must first upgrade to release 2.0.1. Please consult the Kintana website for instructions on how to accomplish this.

Kintana provides Web-based interactive support for all Kintana products. Logon to Contori to enter and track support issues through our quick and easy resolution system.

Logon to Contori at <http://www.contori.com>.



Contori is available to any Kintana customer with a valid support contract (<http://www.contori.com>). First time users should follow the Registration for New Users link on the Contori logon page.

To reach Customer Service directly between the hours of 6am - 6pm PST:

- Mail: support@kintana.com
- Phone: 888-748-9899

Note on Convention

The term 'KINTANA_HOME' is used repeatedly throughout this guide. Please note that this refers to the top directory of the Kintana server on the computer hosting the server. This directory should contain the file *server.conf*, and several subdirectories. All upgrade activities will happen from KINTANA_HOME or a subdirectory of KINTANA_HOME.

Upgrade Requirements

There are a few requirements that should be taken into account for a successful upgrade to Kintana 5.0:

- *New License File Required*
- *Verify that the JAVA_HOME Variable is Set*
- *Spaces in Directories*
- *Minimum Disk Space*
- *Minimum Kintana Version*
- *Minimum Oracle Version*
- *New Required Tablespace*
- *Application Server Memory*

New License File Required

Kintana has made significant changes to the licensing scheme. As a result, you need to obtain new license keys from Kintana before running the upgrade.

Kintana's license keys are delivered within a file (`license.conf`) that will be copied into the `Kintana_Home/conf` directory. The Kintana upgrade will prompt you for the location of the `license.conf` file and then copy it to the correct directory.

Kintana Solutions and Accelerators are licensed separately. When you purchase a Solution or Accelerator, Kintana will provide you with appropriate license information for those products. The license key information for Solutions will be appended to the `license.conf` file mentioned above. Kintana Accelerators are installed on a site-wide basis. No modifications to the `license.conf` file are required.

Verify that the JAVA_HOME Variable is Set

Kintana 5.0 requires that `JAVA_HOME` is set in the system environment of the user account that will be used to start the Kintana server.

To set the value of `JAVA_HOME` in Unix:

In Bourne shell (SH, BASH, or KSH), use:

```
JAVA_HOME="<JVM_Install_Dir>"
export JAVA_HOME
```

In CSH, use:

```
setenv JAVA_HOME "<JVM_Install_Dir>"
```

To set the value of `JAVA_HOME` in NT:

1. Select Start -> Settings -> Control Panel.
2. Open the System Properties window.
3. Click the Environments tab.
4. Set the `JAVA_HOME` variable and value.

Spaces in Directories

Kintana cannot be installed into a directory path whose name contains a space. You may experience problems with Object Types, Reports, and Accelerators if the directory path Kintana is installed into contains a space.

Minimum Disk Space

The upgrade to Kintana 5.0 requires at least 400 MB of hard drive space on the machine running your Kintana instance. This includes temporary disk space required by the upgrade program.

Minimum Kintana Version

The upgrade to Kintana 5.0 requires that you be running Kintana 4.0. If you are currently on any 2.x or 3.x release of Kintana, you must first upgrade to release 4.0. This includes upgrading both the Kintana server and the Accelerators to release 4.0. Please consult the Kintana website for instructions on how to accomplish this.

The 4.0 Upgrade Guide is available from the Download Center at http://www.kintana.com/support/download/download_center.htm.

Minimum Oracle Version

Different types of servers (Windows, Solaris, etc.) can have different minimum Oracle version requirements. Consult the Kintana 5.0 Compatibility Matrix, available from the Download Center at http://www.kintana.com/support/download/download_center.htm, for more information on the minimum Oracle version required for your configuration.

Additionally, you should verify that the Kintana Oracle database instance is installed and configured for optimal performance. For more information, refer to the *"Kintana System Administration Guide"* available from the Download Center.

New Required Tablespace

As of 4.6, Kintana uses a CLOB database object to handle large Notification objects. Kintana recommends storing these CLOBs in a separate tablespace.

Database requirements depend highly on the number of users, types of processes implemented, and type of activity performed. Kintana recommends

creating a 100 MB CLOB tablespace (for a small installation). Refer to the *"Kintana System Administration Guide"* for more information.

Application Server Memory

Kintana 5.0 recommends that the application server have more memory to run its normal operations than previous versions. The following table contains recommendations for the minimum memory requirements. The table considers the number of Kintana servers being run (Kintana cluster mode) and the Java version.

Number of Kintana Servers	Java Version	Recommended Memory
1	JDK 1.3.1	512MB
2	JDK 1.3.1	1GB
3	JDK 1.3.1	1.5 GB



Note

The above memory requirements assume that the server is only running Kintana.

Special Considerations for the 5.0 Upgrade

There are a few changes in the upgrade process and the Kintana server architecture that are noted below:

- *Upgrade Available in Graphical or Console Mode*
- *Microsoft Project Schema*
- *Registry Entry for Kintana Service Dropped and Recreated (NT and 2000)*
- *Accelerator Upgrades*
- *Kintana and Object Migrator on the Same Schema*

Upgrade Available in Graphical or Console Mode

On Windows platforms, Kintana upgrades are run exclusively in graphical mode.

On Unix platforms, Kintana upgrades can be run in either graphical or console mode. When determining the mode in which to run the upgrade, consider the following.

- The graphical upgrade is more user friendly. It allows you to go back and change parameters before starting the installation.
- In some cases, Console upgrades may be the only option. If you choose to upgrade graphically and are accessing the target machine remotely, you may need additional software/configuration (for example, if you are accessing a Unix system from a Windows system you will need software that will allow the Unix application to redirect the display to Windows).

Microsoft Project Schema

Kintana Drive no longer uses a separate database schema for the integration with Microsoft Project (MS Project). If an MS Project schema exists, it is recommended that you drop it, since it will no longer be used.

If you have an MS Project schema, it is listed in the KINTANA_HOME/server.conf file as the com.kintana.core.server.MSP_SCHEMA_NAME parameter.



This change was implemented in Kintana 4.5. This change does NOT affect customers upgrading from Kintana 4.5 or later.

Registry Entry for Kintana Service Dropped and Recreated (NT and 2000)

The Kintana 5.0 upgrade will remove and recreate the Kintana service registry entry for Windows NT and 2000. Your Kintana service name in the Services dialog will now start with the word “Kintana” followed by the value of the KINTANA_SERVER_NAME parameter in the server.conf file.



This change was implemented in Kintana 4.5. This change does NOT affect customers upgrading from Kintana 4.5 or later.

Accelerator Upgrades

Unlike pre-4.0 Kintana upgrades, the Kintana 5.0 upgrade runs in two steps:

1. Upgrading the core Kintana product
2. Upgrading the Accelerators.

In order to upgrade Accelerators, the server must be running, preferably in *Restricted* mode.



If you are upgrading the Accelerator for Oracle Applications, refer to the Upgrade Notes located in the Accelerator's User Guide (available on the Kintana Download Center).

Server Modes

The server can now be run in different operational modes: restricted, normal, and disabled. The server modes are an important part of an Accelerator install or upgrade that requires an isolated Kintana server.

The following modes are supported.

- **Restricted Mode** – The server will only allow logons of users with a 'SysAdmin: Server Administrator' access grant. The server will not run scheduled executions, notifications, or the concurrent request manager.
- **Normal Mode** – The server will run as it runs now, with all enabled users able to logon and all services available according to server.conf parameters.
- **Disabled Mode** – The server is prevented from being started. This only happens when the Kintana core upgrade has exited prior to finishing.

Kintana supplies the script `KINTANA_HOME/bin/setServerMode.sh` to manually set the server mode in situations where it is desirable to obtain exclusive access to a running server.

Kintana and Object Migrator on the Same Schema

If you are running Kintana and Object*Migrator on the same schema, we recommend that you perform a cold backup before attempting to upgrade. If you encounter problems during upgrade, reverting to the cold backup will preserve your Object*Migrator install.

Upgrading to Release 5.0

There are several things to take into consideration before and during the upgrade process. The following sections contain more detailed information on upgrading to Kintana 5.0:

- [*“Upgrade Strategy Overview”*](#) on page 94
- [*“Download the Upgrade Archives”*](#) on page 96
- [*“Backup the Existing Kintana Application”*](#) on page 98
- [*“Unpack the Upgrade Archives”*](#) on page 100
- [*“Run the Upgrade Driver Script”*](#) on page 102
- [*“Configure the Kintana Server”*](#) on page 103
- [*“Upgrading the Accelerators”*](#) on page 104
- [*“Dropping the Microsoft Project Schema”*](#) on page 107



Kintana strongly encourages a test upgrade on a non-production instance before attempting to upgrade your production instance.

Upgrade Strategy Overview

The following section provides an overview of the Kintana upgrade process. Detailed instructions are provided in later sections in this chapter.

1. Download the upgrade archive and any licensed Kintana Accelerator archives.

All upgrade files are contained in a single platform dependent archive, which is posted on the Kintana website (http://www.kintana.com/support/download/download_center.htm). Each upgrade brings a host of new features and functionality, some of which require altering pieces of core Kintana infrastructure.

To guarantee that your Accelerators are always up to date and compatible with the latest version of Kintana, each Accelerator package needs to be updated along with every Kintana upgrade. For this reason, you must also download an upgrade archive for each Accelerator installed in your system. See *“Accelerator Upgrade Archives”* on page 97 for details.

2. Stop and backup the Kintana application.

The Kintana server must *not* be running during the core upgrade process. The total upgrade time, including system backup and verification, will take several hours (between 5 to 12 hours, depending on the amount of data in your system). Please plan accordingly to ensure that the system is not needed during the upgrade. See *“Archive the Kintana Server Filesystem”* on page 98 for details.

3. Unpack the archive.

When the archive is unpacked, an upgrade_500 directory is created in KINTANA_HOME. The upgrade_500 directory contains the upgrade executable (NT) or driver script (UNIX) that will be run to upgrade the Kintana server and database. See *“Unpack the Upgrade Archives”* on page 100 for details.

4. Run the upgrade.

When the program is executed, the Kintana server code is replaced, the data model is updated, and system data is refreshed. Configuration files, reports, and logfiles remain unaffected and are thus still accessible by the new version after the upgrade is complete. See *“Run the Upgrade Driver Script”* on page 102 for details.

5. Update the server configuration.

The next step in upgrading to version 5.0 is to update the server configuration to reflect any new configuration parameters. Once the server is reconfigured, you can restart it and resume system usage. Kintana client software will automatically be updated in each client’s web browser the next time they logon to the Kintana workbench. See *“Configure the Kintana Server”* on page 103 for details.

6. Upgrade the Accelerators.

If Accelerators have been installed, they need to be upgraded as well. Each Accelerator upgrade archive must be unpacked in KINTANA_HOME, creating all necessary filesystem objects for the Accelerators. All Accelerators are upgraded by a single driver script, that must be run with the server running. Please see *“Upgrading the Accelerators”* on page 104 for more information.

7. Remove MSP Schema (recommended)

Kintana Drive 5.0 no longer uses a separate database schema for the integration with Microsoft Project (MSP). If an MSP schema exists it is recommended that you drop it since it will no longer be used.

If you have an MSP schema, it is listed in the KINTANA_HOME/server.conf file as the com.kintana.core.server.MSP_SCHEMA_NAME parameter.

Download the Upgrade Archives

All Kintana upgrade files, including Accelerators, are distributed from the Kintana website (<http://www.kintana.com>). To access the files, you must have a username and password to the website download area, which was provided to you by Kintana at the time of software purchase.

Kintana Upgrade Archive

The Kintana installation files are distributed from the Kintana Website Download Center (**SUPPORT > DOWNLOAD CENTER**). A username and password is required for accessing Kintana software downloads. Once logged into the download center, the user will be provided with links to all files needed to upgrade to 5.0 in the ‘Software Upgrades’ section.

Download the appropriate archive for your operating system and place it in KINTANA_HOME.



Note

Please DO NOT unpack the archive until you have used the instructions in *“Backup the Existing Kintana Application”* on page 98 to back up your current Kintana install.

UNIX	Windows
kupg500en.tar	kupg500en.zip

Accelerator Upgrade Archives

When you upgrade Kintana, each Accelerator installed in your system needs to be updated as well. These can also be downloaded from the Kintana website. Accelerator downloads are located in the ‘Software Installs’ section of the Kintana Download Center.



Note

The Kintana Download Center is designed to provide information by *customer*. This means that customers can only access files for which they are licensed. If you cannot find the correct files/versions you are looking for, please contact Kintana Support.

With the release of version 2.5.1, Kintana introduced the first set of Accelerators (application-specific content modules) for the Kintana product suite. By default, all installs of Kintana before version 2.5.1 contain content that is now packaged in two separate Accelerators: the Accelerator for Oracle Applications, and the Accelerator for Oracle Technologies.

In order to complete the upgrade to 5.0, you will need to download the latest version of all the accelerators which you own, and upgrade them.

Accelerator	File Name
Oracle Applications	oraapps_accel_v505.00.jar
Oracle Technology	oratech_accel_v500.jar
eCommerce	ecommerce_accel_v500.jar
PeopleSoft	peoplesoft_accel_v500.jar
SAP	sap_accel_v500.jar
Siebel	siebel_accel_v500.jar
Database Technology	dbtech_accel_v500.jar

Backup the Existing Kintana Application

Each upgrade refreshes Kintana's filesystem and updates the Kintana database schemas. While we do not anticipate problems during the upgrade, some of these changes may not be easily recoverable should any unexpected complications arise. For this reason, it is **strongly** recommended that you backup the Kintana server filesystem and take a full export of the Kintana database schema prior to upgrading. This will ensure that downtime is minimal and the existing state of the system can be retrieved if necessary.

The backup consists of two steps:

- *Archive the Kintana Server Filesystem*
- *Export the Kintana Database Schema*



Note

The following step calls for you to stop the Kintana server, and it will not be restarted until the upgrade of the Kintana server is complete. The upgrade will not run if the server is running. If the server is not stopped, there is a possibility that users may still be accessing the system; any new data stored between the time of backup and the time the upgrade completes may be unrecoverable if any unexpected problems occur.

Archive the Kintana Server Filesystem

There are many ways to archive the Kintana server filesystem. A common approach is described below. Note that however you create the backup archive, the initial step to stop the Kintana server is required.

- **UNIX**
 1. Stop the server by running *kStop.sh* from the KINTANA_HOME/bin directory:

```
sh kStop.sh -now
```
 2. In the KINTANA_HOME directory, create a TAR archive of the complete Kintana directory tree by issuing: (make sure you have enough disk space...)

```
tar cvf ../<backup filename>.tar .
```

The archive named `<backup filename>.tar` will be placed in the parent directory of `KINTANA_HOME`. Keep this archive at least until you have verified that the upgrade completed successfully.

If it becomes necessary to later restore the archive, move `<backup filename>.tar` into `KINTANA_HOME` and unarchive it by issuing

```
tar xvf <backup filename>.tar
```

- **Windows NT**

1. Open the 'Services' Control Panel. Stop the Kintana service by selecting it (usually named 'Kintana' unless another name was chosen when the server was installed) and click the 'Stop' button.
2. Open a DOS window and navigate to the parent directory of `KINTANA_HOME`. Create a ZIP archive by issuing:

```
zip <backup filename>.zip -r KINTANA_HOME
```

The archive named `<backup filename>.zip` will be placed in the parent directory of `KINTANA_HOME`. Keep this archive at least until you have verified that the upgrade completed successfully.

If it becomes necessary to later restore the archive, move `<backup filename>.zip` into the parent directory of `KINTANA_HOME` and issue

```
unzip <backup filename>.zip
```



The Windows NT instructions described here will vary depending on the version of the ZIP utility on your system.

Export the Kintana Database Schema

Described here is a common way to obtain an export of the Kintana schema. From the command line on an Oracle server which has direct or SQL*Net access to the database on which Kintana's schema resides, issue the following (on one line):

```
exp USERID=system/<system password>@<connect string> COMPRESS=N  
INDEXES=Y FILE=knta_<date>.dmp OWNER=knta
```

In this example, 'knta' is the name of the Kintana schema, and the file that will contain the export is called *knta_<date>.dmp*, where <date> is the current date.



Note

If performing the export on Windows NT, the 'exp' command may be named 'exp80' (for Oracle 8). Please use whichever export command is available.

Keep the export file at least until you have verified that the upgrade has completed successfully.

If it becomes necessary to later restore the archive, you must first drop the Kintana schema, reinitialize it, and then import from the export file. To do this, issue (again assuming 'knta' is the name of the Kintana schema):

```
sqlplus system/<system password>@<connect string>
SQL> drop user knta cascade; (this will take a few minutes)
SQL> create user knta
identified by <knta password>
default tablespace <data tablespace>
temporary tablespace <temp tablespace>
quota unlimited on <data tablespace>
quota unlimited on <index tablespace>
quota unlimited on <temp tablespace>;
quota unlimited on <clob tablespace>;
SQL> grant connect to knta;
SQL> grant create session to knta;
SQL> grant create database link to knta;
SQL> grant create procedure to knta;
SQL> grant create sequence to knta;
SQL> grant create synonym to knta;
SQL> grant create table to knta;
SQL> grant create view to knta;
SQL> grant create trigger to knta;
SQL> exit;
imp USERID=system/<system password>@<connect string> INDEXES=Y
GRANTS=Y FILE=knta_<date>.dmp IGNORE=Y TOUSER=knta
FROMUSER=knta
```

Note: If performing the import on Windows NT, the 'imp' command may be named 'imp80.exe' (for Oracle 8). Please use whichever import command is available.

Unpack the Upgrade Archives

Prior to running the upgrade driver script, you must unpack the upgrade archives for the Kintana software and each installed Accelerator. Instructions are slightly different for UNIX and Windows NT, so this section has been divided into two separate instruction sets.

These instructions describe unpackaging the Kintana products software and, for the sake of example, the Oracle Applications Accelerator and the Demand Management Solution. Note that the name of the Accelerator archive and driver script will be different for each Accelerator, but in the same format.

Unpacking the Upgrade Archives on UNIX

If the Kintana server is a UNIX computer, follow these steps to unpack the upgrade archives:

1. Ensure that the Kintana upgrade archive (*kupg500en.tar*) and all Accelerator upgrade archives (e.g. *oraapps_accel_v500.jar* for the Oracle Applications Accelerator) that you downloaded from the Kintana website are located in the KINTANA_HOME directory.
2. Extract each archive in the KINTANA_HOME directory. Example:

```
tar xvf kupg500en.tar
jar xvf oraapps_accel_v500.jar
```

This will create a new subdirectory named KINTANA_HOME/upgrade_500. Similarly, each Accelerator archive will create a new subdirectory in the KINTANA_HOME/Accelerators directory.

Unpacking the Upgrade Archives on Windows NT

If the Kintana server is a Windows NT computer, follow these steps to unpack the upgrade archives:

1. Ensure that the Kintana upgrade archive (*kupg500en.zip*) and all Accelerator upgrade archives (e.g. *oraapps_accel_v500.jar* for the Oracle Applications Accelerator) that you downloaded from the Kintana website are located in the KINTANA_HOME directory.
2. Unzip all of the upgrade archives in the KINTANA_HOME directory. This can be done with a graphical application such as WinZip, or from a DOS window as shown here (continuing with the Oracle Applications Accelerator example):

```
unzip kupg500en.zip
jar xvf oraapps_accel_v500.jar
```

This will create a new subdirectory named KINTANA_HOME/upgrade_500. Similarly, each Accelerator archive will

create a new subdirectory in the KINTANA_HOME/Accelerators directory.

Run the Upgrade Driver Script

The upgrade driver script (UNIX) or executable (NT) starts the filesystem and database schema upgrade process, which will take several hours. You will be prompted for the passwords for the Kintana user and any user with SYSTEM-level database accounts. Instructions are slightly different for UNIX and Windows NT, so this section has been divided into two separate instruction sets.

Note

If you do not have a public grant to v_\$session, you need to perform the action detailed in this note.

For the Kintana suite to be able to keep track of the open database sessions it is using, ensure that a public grant exists on the V_\$SESSION Dynamic Performance Table. To do this, connect as SYS to the database containing the Kintana schema and execute:

```
SQL> grant select on v_$session to public;
```

Running the Upgrade Driver Script on UNIX

To run the driver in console mode:

1. Navigate to the KINTANA_HOME/upgrade_500 directory.:

```
cd KINTANA_HOME/upgrade_500
```

2. Run the driver:

```
sh knta_upgrade.sh -console
```

To run the driver in graphical mode:

1. Navigate to the KINTANA_HOME/upgrade_500 directory.:

```
cd KINTANA_HOME/upgrade_500
```

2. Run the driver:

```
sh knta_upgrade.sh -awt
```

Note

On UNIX, you must run this utility in an X-Windows session, since it displays a graphical user interface. This only applies if you are running the driver in graphical mode.

Running the Upgrade Driver Script on Windows

To run the upgrade on a Windows machine:

1. Navigate to the KINTANA_HOME/upgrade_500 directory.
2. Double click on kupg500en.exe.

The upgrade (for both Unix and Windows) will prompt you for password information and then perform some system tests before continuing the upgrade. These tests check for the existence of any temporary tables leftover from a previous upgrade. If any of these tests fail, please follow the instructions printed to the screen to remedy the problem and continue. Once all temporary tables have been removed, the upgrade will begin. If you encounter unexpected errors at that point, please refer to Contori at <http://www.contori.com> or contact Kintana Support.

Configure the Kintana Server

Several new server parameters are defaulted for version 5.0 to support new functionality. The server should be reconfigured *only* if the default values of the new parameters need to be changed. To do this, run the server configuration utility and fill in values for any new fields:

1. From the KINTANA_HOME/bin directory, execute kConfig.sh from a UNIX or DOS command line by running:

```
sh kConfig.sh
```

This can be run in GUI or console mode. Choose the mode in which you would like to run the configuration tool.



On UNIX, you must run this utility in an X-Windows session, since it displays a graphical user interface. This only applies if you are running the driver in graphical mode.

2. The configuration wizard will walk you through the configuration of the Kintana server. Enter a value for each parameter as appropriate to your site. Click **HELP** to review the descriptions provided with each parameter. Some are defaulted and should not be changed except in special circumstances. Others are defaulted with typical values but may be overridden if desired.

Fill out all required parameters. *Table 3-1 on page 44* lists the new server parameters.

3. The last section in the server configuration utility is “Custom Parameters.” This is where necessary additional parameters are entered to account for non-standard configurations. See *"Kintana System Administration Guide"* for a complete list of all server configuration parameters.
4. After all parameter values have been entered, click **OK** to apply the configuration.
5. The configuration tool does a few additional things at this point:
 - a. Writes the configuration parameters to the `server.conf` file.
 - b. Generates other files needed internally by the Kintana server, such as `resin.conf`.
6. Once the server is reconfigured correctly, it can be started.
 - **UNIX:** Go to the `bin` subdirectory and execute `kStart.sh`, as follows

```
cd KINTANA_HOME/bin
sh kStart.sh
```
 - **Windows NT:** Open the Services Control Panel, click on the Kintana service (named ‘Kintana <value of KINTANA_SERVER_NAME in the server.conf file>’), and click the ‘Start’ button to start the server.

Upgrading the Accelerators

Kintana Accelerators must be upgraded after the upgrade of the Kintana server. Upgrading the Accelerators require the Kintana server to be running, preferably in Restricted mode. Restricted mode limits the functionality of the server, which is important at this point as the Accelerator data is in an intermediate state. The Kintana upgrade will detect any installed Accelerators, and set the server mode accordingly.

To upgrade the Kintana Accelerators:

1. Make sure that you have downloaded and extracted all of the Accelerator bundles http://www.kintana.com/support/download/download_center.htm.

2. Make sure that the server is running, in restricted mode if possible. To check the mode of the server, run `setServerMode.sh`:

```
cd KINTANA_HOME/bin; sh setServerMode.sh
```

without parameters. To set the server mode to restricted (or any other mode) run:

```
cd KINTANA_HOME/bin; setServerMode.sh RESTRICTED
```

For more information on Server Modes, please refer to “*Server Modes*” on page 93.

3. Run the Accelerator upgrade driver script

```
cd KINTANA_HOME/upgrade_500; sh kAcclUpgrade.sh
```

Follow the instructions at the start of the script. After entering the required information, the script will upgrade all Accelerators, and set the server mode to Normal.

If you are an Oracle Applications customer and are using the Accelerator for Oracle Applications, you will also be prompted for the extra Oracle Applications parameters.

4. After the Accelerators have been successfully upgraded, restart the Kintana server for the server mode changes to take affect.

Verify the Upgrade

After completing the upgrade process, take some time to verify that the system behaves as before. If you run into problems or have additional questions, please contact Kintana Support (<http://www.contori.com>).

Optional Post-Upgrade Activities

The following activities can be performed to finalize any outstanding data conversions or population:

- [*Updating Kintana Drive Project Data*](#)
- [*Updating Users with Resource Information*](#)
- [*Dropping the Microsoft Project Schema*](#)

Updating Kintana Drive Project Data

Converting Effort Data

If you selected to skip the Effort conversion when performing the 5.0 upgrade, you can run the conversion tool at a later date. To run the conversion tool after the upgrade, run the following script:

```
KINTANA_HOME\bin\kConvertProject.sh
```

You will need to know the following information to complete the conversion:

- Master Project ID or Master Project Name
- The Kintana username of the user running the update
- The units used for the Effort fields in the Master Project (either DAYS or HOURS, usually DAYS).
- The database password for \$SCHEMA_USER

Synchronizing Drive Projects with Microsoft Projects

After upgrading to 5.0, project managers who manage Kintana Drive projects by planning their projects using Microsoft Project should perform a post-upgrade step. Specifically, these are the project managers who have specified the MS Project integration style for their project(s) as either **MICROSOFT PROJECT CONTROLLED** or **KINTANA DRIVE CONTROLS ACTUALS**. After the 5.0 upgrade, these project managers should use the Microsoft Project synchronization wizard to synchronize the Kintana Drive Project with the Microsoft Project file.

Prior to 5.0, Kintana Drive did not synchronize scheduled effort or actual effort values for projects where the Project Settings marked these two fields as disabled. Since the new Resource Management visualizations rely on effort values, the 5.0 upgrade will default effort values for these projects. This default value is calculated with the assumption that the assignments in Microsoft Project were at 100% units (full-time allocation). This means that after the 5.0

upgrade, the new Resource Management visualizations may show some resources as over-allocated, where the Microsoft Project assignments were at less than 100% units. These inaccuracies are corrected the first time each Kintana Drive project is synchronized with Microsoft Project.

Updating Users with Resource Information

Each Kintana user account is now tied to a Resource account in Kintana. You can populate the Resource information associated with each Kintana user using the User window (one user at a time) or using Kintana's User Open Interface. See the "[Kintana Open Interface](#)" for instructions.

Dropping the Microsoft Project Schema

Kintana Drive no longer uses a separate database schema for the integration with Microsoft Project (MS Project). If an MS Project schema exists it is recommended that you drop it since it will no longer be used.

If you have an MS Project schema, it is listed in the KINTANA_HOME/server.conf file as the com.kintana.core.server.MSP_SCHEMA_NAME parameter.

You must connect as a user with SYSTEM-level access in order to drop the MS Project schema. Be sure that you drop the MS Project schema and *not* the Kintana schema. If you are unsure, do not drop the schema.



This change was implemented in Kintana 4.0. This change only affects users upgrading from a pre-4.0 version of Kintana.

Appendix



Enhancements from STARs

This section details the smaller enhancement requests and bug fixes originating from customer-logged support issues (STARs) introduced in Releases 4.6 and 5.0. Included along with the description of the bug or enhancement is the STAR number from Contori, as well as the bug or enhancement Request number from Kintana.

If you have submitted STARs that are not on this list, you may view their status directly in Contori.

Table A-1. Enhancements/Fixes Introduced in 5.0

STAR	Request	Description/Resolution
62452 69914 72071 73102 71454 73129 75464 76334 73921	65078	Clicking on the calendar icon in the Kintana Interface will now open a calendar from which users can select a date to populate the field.
72038	85706	The Copy From of Request Type fields functionality now copies the available batch and parameter numbers.
73220	97454	When importing Resources into Drive from Microsoft Project, you can now import resources in Last Name, First Name format.
74274	101565	Kintana no longer allows LDAP-authenticated users to change their password.
80073 75198 77975	103173	Text areas in the Kintana interface no longer “stretch” when inputting very long text strings.

Table A-1. Enhancements/Fixes Introduced in 5.0

STAR	Request	Description/Resolution
75433	103566	When creating a reference Request via the references tab in the Kintana interface, data is now defaulted on the child Request based on matching token names from the parent Request
75760 74678 74671	103928	Changed hard-coded paths in JSPs to be dynamic.
76058	104554	Rules on the Request Type have been fixed to correctly resolve Tokens that resolve to text with an apostrophe.
76072	105146	Saving file attachments from the Reference section no longer creates an error.
75911	105394	The Run Kintana User Interface Report now resolves the following token: [RP.CREATED_BY_USERNAME].
76565	106142	Portlet filter (auto-complete) for Request Types no longer displays REFERENCE Request Types.
76908	106783	Validations used in a Portlet's filter field now appear in that Validation's Used By tab.
77175	107527	Request Type Detail Report command now contains the correct token for the Show Rules option.
77277	107621	Request Type now defaults properly from the Create Request Workflow step in the Kintana interface.
77706 78816	108177	Running the Compare Custom Database Setup Report no longer fails when comparing Workflows.
77758	108192	You can now obtain an extract of filesystem changes separate from the upgrade packages. Contact Kintana Support for details.
76834	108686	Improved performance of Kintana Migrators for large Request Types.
78497	109048	Time component of date field now works with all timezones.
78686	109155	Added a presentation key parameter to template loading methods to represent the directory being used. This enables the template to be picked up even when they are in a customized jsp directory (not knta_home/web/knta/global)
78724	109213	Token resolution for [PKG.WORKFLOW_NAME] and [PKG.WORKFLOW_ID] no longer cause command execution errors.
78761	109265	Workflow Parameter Tokens are now being correctly evaluated in sub-workflows.

Table A-1. Enhancements/Fixes Introduced in 5.0

STAR	Request	Description/Resolution
80232	111265	Tokens embedded in subworkflows are now resolving correctly.
77526	109347	Portlet filters are now being placed in the order they are set within the Portlet definition.
79061	109692	Deprecated database objects are now dropped by the Kintana upgrade.
79184	109815	Time Management users can now copy a timesheet to multiple time periods (instead of just the current period).
79685	110390	Kintana 5.0 now includes an indicator that notes have been included on the Time Sheets.
79462	110397	Usability for the Add Reference: Task functionality has been improved.
79575	110425	Notifications configured to be sent on "Specific Error -> NULL result" are now being sent/created.
79512	110466	Fixed dependency behavior between custom fields on separate tabs on Project Templates. When there are two custom fields and one field is dependent on another, the second field will populate regardless of whether the fields are on the same tab.
79443	110491	Improved performance for adding or removing a standard or a user defined token in the Security tab behind a Workflow step source.
79688	110501	When cancelling a timesheet, the warning's default has been changed from OK to Cancel.
79569	110526	The Project Custom Detail Report no longer shows duplicate records for each project manager.
80590	111400	When entering hours in time sheet details, two decimal places are consistently used.
80685	111541	TM - Time Sheet Details Report now display all time sheets for delegates.
80661	111584	Request Type filter (auto-complete) on the Request Search page no longer displays REFERENCE Request Types.
80831	111821	System no longer defaults to wrong date when typing a value in Date field.
80548 71354	112385	Deliver Packages no longer get "stuck" in ready for release status.

Table A-2. Enhancements introduced in 4.6

STAR	Request	Description
64466	69382	The Kintana interface now shows the full Workflow in graphical view.
64634	69612	Notifications are no longer sent after a Request closes.
65695	70968	Reports displaying custom fields can now be viewed from the Kintana Create interface.
66154	71669	Smart URLs now function when the web requests go through a proxy server.
66609	81800	Notifications are now sent when a Workflow Step runs PL/SQL that results in an Oracle error.
67266	73432	When the Package Open Interface is run, the SEQ column is now continuous.
67329	73402	Running the Request Open Interface now inserts a timestamp into the Notes.
67380	73767	Notifications can now be sent in HTML form, allowing for customization (color, font, images, etc.).
68938	75842	Full transaction histories for Requests, Package Lines, and Distributions can now be viewed including Subworkflows.
69120	79223	When migrating Kintana entities with disabled commands, the commands stay disabled in the destination instance.
69382, 73499	100961	Security Groups with more than 30,000 users can now be opened in the Kintana Workbench.
69542	81236	User Data tokens are now resolved in Token-Based Override Validations.
69644	81604	The seeded Validation 'DLV - Object Type Name (Migrator Source)' now retrieves object_type_id values greater than 10000.
70271	82169	During install, Kintana now handles multiple IP addresses for RMI communication properly.
70498, 72753, 71108	82358	Field prompts of greater than 20 characters no longer cause errors.
70493	82485	Reporting Meta Layer views for Request Types with more than 250 custom fields now work correctly.
70575	82467	Saved queries in the Validation Workbench now work outside of the session they were saved in.

Table A-2. Enhancements introduced in 4.6

STAR	Request	Description
70636	85058	Notifications are now sent out when specified to be sent on the “Null Value” error.
70816	82825	Variables in Special Command conditions can now be set using ksc_set and ksc_store.
70861	82957	Multi-select auto-complete fields can now handle large numbers of values in a Validation.
70904, 74229	82943	Multiple Package Lines can now be added to a Package simultaneously.
71033	83205	A trigger in Kintana 3.1 no longer causes an error during the Kintana schema import.
71571	84527	Updated passwords now function properly when accessing a Request from an email Notification.
71695	84566	Request fields can now be set blank using “upon field change” Request Rules.
71798	85038	Changing a user’s password no longer results in an error that sometimes used to occur the next time the user logs on with the new password.
71767	85616	The Auto-Complete with Delimited Output by Command Validation no longer freezes the Workbench in certain situations.
72238	85731	Username that contain commas are now resolved properly for dynamic security and email Notifications.
72481, 74752	102271	Migrating a Request Type no longer results in a Duplicate Field Dependencies error in certain cases.
72692	93005	Spawning a Request from a Request with a different Type and Header Type no longer occasionally causes an error.
73050, 73585	94536	Refreshing the Request Creation Confirmed page no longer creates a duplicate Request.
73094	95168	Timestamps in the Notes sections of entities are now consistent with the user’s Regional Settings.
73134	95312	A Package can now have up to 1000 lines.
73146	95681	The ksc_store command can now store up to 1800 characters in a variable.
73181	96755	When creating a Report Type, the preview mode now shows the Date field correctly, instead of displaying Time.
73095	96833	Validations can now have spaces in their Code names.
73233, 73371	97897	The Created By field no longer unpredictably affects the layout of Request Header fields in the Kintana interface.

Table A-2. Enhancements introduced in 4.6

STAR	Request	Description
73540	101827	ksc_simple_respond no longer hangs under certain conditions involving the QTERM program or high system load.
73894	100988	Changing a Request's Type no longer causes you to refresh the screen in order to note which fields are required.
74014	101117	Request Rules now update auto-complete fields correctly in the Workbench after Workflow transactions.
74071	101242	The top row of a Project Template no longer causes a save or migration to fail when it is the same as the top row of a Master Project.
74608	102173	Special Commands now evaluate Tokens properly in Command Conditions.
74654	102208, 102209	The last logon date for a user now remains accurate despite purges of the KNTA_LOGON_ATTEMPTS table.
74665	102526	Migrator Object Type commands now handle override passwords correctly.
74690	102361	Performing a Workflow Action when the associated Request Header Type is set to not display the Request Number field no longer results in an error.
74756	102293	Rules based on auto-complete fields no longer trigger a database locking error in certain cases.
74836	102434	The Synchronize Meta Layer report no longer returns an Oracle error when working with multiple Request Type batches.
74849	103176	Tokens for connection protocols in Object Types are now resolved properly.
74941	102672	The Installation Wizard no longer creates indexes in data tablespaces.
75067, 75283	102876	The Synchronize Meta Layer report can now be scheduled to run periodically.
75355	103408	Reporting Meta Layer views for Request Types now generate columns for detail fields beyond the first batch.
75479	103610	An Oracle version number that includes non-numeric characters no longer prevents Kintana upgrades.
76267	104887	Copying a Project with the Notes option selected no longer results in an error.
76281	105271	Project Notes in the Kintana interface now wrap properly.

Table A-2. Enhancements introduced in 4.6

STAR	Request	Description
76715	106409	The upgrade and installation script for the Reporting Meta Layer schema RMLSetupSchema.sql now excludes custom objects.
Release Management Issues Fixed in 4.6		
63080	67000	A Release could not be submitted without any Packages.
64501	69181	Release Management Workflows were unable to branch based on Object Type.
68596	78320	The “Last Line” command was running on every Package in a Release instead of just once.
70503	82397	ksc_set_exit_value did not work on Release Distributions.
71066	84390	Tokens were not getting resolved in parameter values for Release Notifications.
71556	84865	When a Package is submitted to a Ready For Release step, something should happen.
75093	103368	When one Package Line exited a Subworkflow, the remaining lines became ineligible.

Appendix B Known Issues

The following sections detail known issues with the Kintana 5.0 upgrade. Any available solutions or work-arounds are provided. Bug numbers and support STARs are included when applicable.

Kintana 5.0 includes the following known issues:

- *Incompatibility Between IIS and Gzip*
- *Pie and Bar Charts Exception*

Incompatibility Between IIS and Gzip

Kintana Request Number: 120555

Problem: An intermittent “Page cannot be displayed” error occurs when users perform certain actions in the Kintana interface. The problem can occur when a user clicks a button that refreshes the same page. For example, this can occur when a user tries to expand or collapse a section on a page or when he toggles between views on the Budget and Resource Pools pages.

This only occurs when the Kintana is configured as follows:

- The Kintana client is using Internet Explorer 6.x
- Kintana is integrated with an IIS external Web server
- The server has the Gzip option turned on (this is the default setting)

Solution / Workaround: Gzip is turned on by a typical Kintana upgrade or installation. To avoid the above behavior, you need to turn Gzip off. This is done using the following procedure:

1. Open the `tune.conf` file located in the following directory:

```
KINTANA_HOME/conf/tune.conf.
```

2. Changes the following parameter to false:

```
com.kintana.core.server.GZIP_ENCODING_ENABLED=false
```

3. Save `tune.conf` and go to the `KINTANA_HOME/bin` directory.

4. Run the following command to update `resin.conf`:

```
sh kUpdateHtml.sh
```

5. Turn off IIS by running the following using the command line:

```
net stop w3svc
```

6. Stop the Kintana server.

7. Turn on IIS by running the following using the command line:

```
net start w3svc
```

8. Start Kintana server.

This will turn off the Gzip compression so that the problem described above will not appear.

Pie and Bar Charts Exception

Problem: Pie and Bar charts throw exceptions when “Group By” is large

Portlets that contain pie and bar charts can throw an exception error when the value in the Group By field contains a large number of items. This is an issue with the program used by the portlet to create the charts. A pie or bar chart with more than 250 items will encounter an error.

To avoid this problem, select a value for the Group By field that will not yield 250 items.

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