

KINTANA™
Processing Packages

Version 5.0.0

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Chapter
1**Introduction to Kintana Deliver**

Kintana Deliver is designed to automate the deployment of technology solutions. Business system components created or modified by an initiative are grouped into Kintana Deliver Packages. These Packages have workflows associated with them that automate the process of moving each Package through required steps, which typically involve system build, testing, quality assurance, staging, and final deployment. Kintana Deliver automatically deploys the application components necessary for each Package, such as XML content, HTML files, Java programs, Oracle Application configurations, PeopleSoft panels or Siebel projects.

For example, this software will connect to the development environment, copy Java files from the version control repository and transfer the files to the quality assurance environment. It will then use the Java compiler to compile and link all the files into a single Java program. A built-in scheduler allows the customer to schedule deployments. Kintana Deliver maintains an audit trail for all activities including Package information, application components altered, approvals obtained and deployments performed.

This chapter provides an overview of Kintana Deliver and its features. Included is information on the conventions used within the manual and a list of additional resources.

Kintana Deliver Features

Kintana Deliver helps break down the barriers between the parties involved in managing change by providing a means of efficient communication and establishing repeatable and structured business processes. It also saves time and ensures quality by automating application deployment. The most important features of Kintana Deliver are:

- A powerful workflow engine that automates processes, from basic approval cycles to workflows with multiple approvals, code migrations, and quality assurance steps.
- An intelligent and easy-to-use email notification system.
- A configurable Java-based execution mechanism available through the workflow that controls enterprise-specific objects and automates their migration to various environments.
- Automated deployment, ensuring accuracy and reducing time and effort.
- Flexible environment configuration.
- A dynamic Web-based reporting mechanism.
- An audit trail for all Package activity.
- Full security to control access levels to the application.
- Seamless integration with Kintana Create, Kintana Drive, Kintana Dashboard, Object*Migrator, and GL*Migrator.

The following key elements of Kintana Deliver allow you to efficiently and effectively manage your IT organization:

- *Packages*
- *Workflow Engine*
- *Software Deployment*
- *Audit Trail for Software Changes*
- *Security*
- *Integration with Version Control*
- *Object Migration*
- *Integration with Kintana Create*
- *Integration with the Kintana Dashboard*
- *Integration with Third Party Applications through Accelerators*

Packages

Kintana Deliver uses Packages to manage the repetitive manual tasks performed daily by key personnel in your organization. Users can group

software changes for a specific modification into a Package and assign the Package a unique tracking number.

Each Package line can contain information such as OBJECT NAME, OBJECT TYPE, and other object specific parameters. The Object Type definition contains the characteristics of different types of software objects, such as C Programs, Cobol Programs, HTML files, Visual Basic Programs, SQL Scripts, Oracle Forms, Oracle Reports, Oracle AOL Configurations, and Power Builder Screens, among others. Kintana Deliver includes a library of pre-seeded Object Types and offers the ability to add other Object Types specific to your environment.

Attachments such as justification documents or detailed design documents can be associated with a Package. In addition, free-form notes fields and user-defined fields can be used to capture any additional information.

Due to the power of Kintana Deliver, Packages can take many forms and fulfill many functions. For example, a Package to alter application code may specify database or file system objects. A Package to make a new employee account may specify the employee name, department, and type of access required.

Figure 1-1 shows a sample PACKAGE window.

The screenshot shows a window titled "Package: 30196". The "Package Information" section includes the following fields:

- Package No.: 30196
- Package Group: [empty]
- Created By: jsmith
- Description: Migrating a file.
- Created On: April 10, 2002
- Workflow: Dev -> Test -> Prod
- Package Status: In Progress
- Assigned User: jsmith
- Priority: Normal
- Parent: [empty]
- Assigned Group: [empty]
- Package Type: Customization
- Priority Seq: 50

Below the information is a table with the following data:

Seq	Object Name	Object Type	1 Design Review	2 Evaluate	3 Migrate to Test	4 QA Test	Mi
1	file.zip	File Migration	Eligible				

At the bottom of the window are several buttons: Refresh, Select All, View -->, Line Exec Log (Latest), Pending Save, Submit, OK, Save, and Cancel. The status bar at the very bottom reads "Ready".

Figure 1-1 Sample Package Window

Package Definition

Packages contain the objects that you are approving and/or migrating. A Package is represented by a Package general information region and Package Lines. The general information region consists of tracking information about the Package, such as the Package number, the date on which it is generated, and a brief description of the Package. A Package Line contains information about the object to be migrated and its status as it progresses through the Workflow. Each object has properties corresponding to a particular Object Type, such as a SQL Script or AOL Menu. When you enter a Package Line, Kintana Deliver prompts you to provide only those parameters that are applicable to the current Object Type.

Package Prioritization

All Packages created by a project team must be prioritized to maintain project scope and direction. Kintana Deliver includes reporting functionality that provides a flexible view of Package information with the ability to display data in detail or summary format. The prioritization process is made easier with the visibility provided by Kintana Deliver reports. Kintana Deliver also allows Packages to be tagged with customer-defined priority codes that can also be used as filters in Package reporting.

Package Disposition

The last function in the Package management process is disposition. Each Package that enters the process should ultimately be closed. However, there are a variety of ways to close a Package. Using Kintana Deliver, Packages can be closed with no tasks assigned, after a program change is placed into production, or after a process Request is resolved.

Workflow Engine

The next step involved in the processing of a Package is the routing and analysis of the Package. This process is automated by the Kintana Deliver Workflow Engine which automates the routing process based on a specific Workflow.

A Package is assigned to a workflow, which routes it according to business rules. Most organizations have business processes already in place to handle various changes. You can configure your business processes into whatever Workflow you desire. Each workflow routes the Package through a specific sequence of steps consisting of notifications, approvals, and executions. Flexible approval methods, escalation, and delegation features allow you to efficiently advance a Package through a workflow.

Kintana Deliver includes a Graphical Workflow Business Modeler that allows you to visually lay out a Workflow. You can create different Workflows effortlessly using just point, click and drag-and-drop movements. Complex business rules can be modeled with the branching, voting, escalations, and parallel execution features of the Workflow builder. *Figure 1-2* shows a sample Kintana Deliver Workflow.

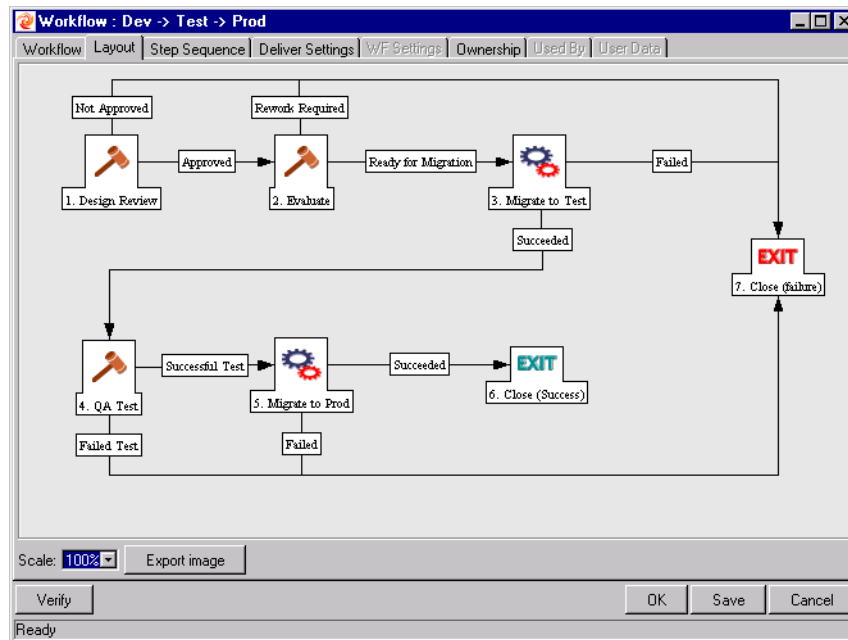


Figure 1-2 Sample Kintana Deliver Workflow

Software Deployment

The various objects of a Package are automatically deployed by the Kintana Deliver built-in Java Execution Engine. Based on the Object Type, the execution engine performs the tasks required to install the objects correctly. For example, the execution engine will log into the Development environment with a username and encrypted password, checkout a C Program from your version control repository, and transfer the file to the QA environment. It will then use the C compiler to compile and link the program. Additionally, using the built-in scheduler, you can schedule the deployments to suit your business needs. For example, you can schedule deployments for late at night or during a weekend when system load is minimal.

Audit Trail for Software Changes

Kintana Deliver maintains a complete audit trail for software changes. All current and historical Package information, software objects altered, approvals obtained, and deployments performed are stored in the Kintana Deliver repository. Standard audit trail and reconciliation reports are provided with Kintana Deliver; you can build custom reports to suit your requirements. The audit trail provides valuable information for troubleshooting and brings accountability to any software change. The Graphical Decision Support System reports allow you to identify bottlenecks in the software change process or to look at activities that consume most of your IT resources. This information can be exported to a spreadsheet for further analysis.

Security

Kintana Deliver provides secure deployment of software changes. You can define Security Groups such as Developers, System Administrators, IT Managers, and IT Operations, depending on your IT organizational structure. Users are then assigned to one or more Security Groups, which gives them the access they need to perform specific tasks assigned to their group.

Since Kintana Deliver is performing all the software change activities, you need to share secured environment passwords with only a few staff. This protects your environment from unauthorized changes and improves the stability of your mission-critical business applications.

Integration with Version Control

Kintana Deliver provides complete integration with all standard version-control systems including RCS, SCCS, PVCS, ClearCase, CCC/Harvest, and Visual SourceSafe. The Kintana Deliver outbound API provides all check-in, check-out, and promotion functions during deployment.

File system objects can be deployed to new installations and updated in version control simultaneously. This synchronizes your version-control repository, physical installations, and Kintana Deliver Workflows.

Object Migration

Kintana Deliver migrates the objects listed on a Package by using standard or custom commands. A standard set of Object Types is shipped with Kintana Deliver, such as SQL Script (which moves the script to the destination environment and executes the script automatically against the destination database) and File Server->Server (which copies a file from the source server

environment to the destination server environment). Custom objects that interact with third-party software through a command line interface can also be defined.

Integration with Kintana Create

Kintana Deliver serves as a system to manage the physical deployment of changes to your applications environment, but of equal importance is the gathering and analysis of issues (Requests) related to the stability of the system. To facilitate this Request gathering, Kintana Deliver is integrated with Kintana Create. Like Kintana Deliver, Kintana Create is a Workflow based system that features complete audit trail tracking of Requests from inception to close. Kintana Create can also be configured to automatically generate Packages in Kintana Deliver. The tight integration between Kintana Create and Kintana Deliver allows Packages to be automatically generated from Requests in Kintana Create and have Kintana Create Requests automatically updated upon completion of the Kintana Deliver Package. This closed-loop integration ensures a coherent and consistent view of your issue statuses and removes the need for redundant data across multiple applications.

Integration with the Kintana Dashboard

Kintana Deliver provides an additional level of efficiency when used in conjunction with the Kintana Dashboard. The Kintana Dashboard is a highly configurable, high-level application that offers greater visibility and control over your business processes. As a complement to the HTML Interface, the Kintana Dashboard seamlessly integrates with all Kintana products in a way that allows for delivery of real-time status and exception information on IT initiatives and operational tasks.

Integration with Third Party Applications through Accelerators

Accelerators are application-specific modules which automate the deployment and post-deployment steps of objects, files, and patches. Accelerators are fully integrated with the Kintana core products to provide a total solution for managing various enterprise applications. The following Accelerators are currently available:

- **Accelerator for Database Technology:** Enables the Kintana Product Suite to support other databases besides Oracle. Organizations need to incorporate the use of different database base platforms. By making Kintana products more flexible in their interaction with different databases, they can better accommodate a wider range of products. The Kintana Accelerator for Database Technology also addresses the need for

mainframe integration at both the Operating System and database level for DB2.

- **Kintana Accelerator for Oracle Applications:** Certified by Oracle, automates interaction with Oracle's ADPATCH utility. It also automatically deploys updates to the Application Object Library (AOL) and General Ledger (GL) modules and software objects at the File System level.
- **Kintana Accelerator for Oracle Technology:** Enables automated deployment and effective management of packaged and custom Oracle applications using technologies such as SQL*Plus, PL/SQL, pre-compilers, Oracle Forms, and Oracle Reports.
- **Kintana Accelerator for eCommerce Technologies:** Includes best-practice workflows and templates that enable you to streamline processes, improve communication, and automate software deployment to manage eCommerce initiatives. Also, the Kintana Accelerator for eCommerce Technologies fully integrates with Web servers, application servers, content management systems, and backend databases to manage changes associated with any of these tiers.
- **Kintana Accelerator for SAP/R3:** Extends and enhances R/3's native Transport Management System by automating and tracking R/3 transports, easily allowing non-experts to transport R/3 application changes through multiple R/3 environments. The Kintana Accelerator for SAP R/3 speeds the process of applying R/3 updates and SAPNet Notes Application by automating and tracking the transport approval process.
- **Kintana Accelerator for PeopleSoft:** Certified by PeopleSoft, combines best practice workflows, templates, and object types to streamline PeopleSoft implementation and application management.
- **Kintana Accelerator for Siebel eBusiness Applications:** Enables faster Siebel deployments with fewer errors, and easily allows non-experts to migrate Siebel eBusiness Application changes through multiple environments.



For an up-to-date listing, visit our products page (www.kintana.com).

Manual Conventions

The following conventions are used when presenting information in the User's Guide text that refers to Kintana products' user interface components:

- All Kintana buttons, tabs, menu items, and any system data selected from a drop down list or auto-complete list are depicted in **BOLD SMALL CAPS** text.
- Fields, window names and page names are depicted in **SMALL CAPS** text (non-bolded).
- Each menu item is represented with the top-level menu name followed by a greater than symbol “->” followed by subsequent sub-menu names separated with the “->” symbol. For example, **FUNCTIONS -> BROWSE** represents the **BROWSE** menu item contained within the top-level **FUNCTIONS** menu.
- Images depicting the Kintana interfaces used throughout this book may vary slightly from your installation depending on which Kintana products you have installed on your system.

Additional Resources

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

- [Kintana Documentation](#)
- [Kintana Services](#)
- [Kintana Education](#)
- [Kintana Support](#)

Kintana Documentation

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

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

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

- [*Kintana Business Application Guides*](#)
- [*User Guides*](#)
- [*Kintana Application Reference Guides*](#)
- [*Kintana Instance Administration Guides*](#)
- [*External System Integration Guides:*](#)
- [*Kintana Solution Guides*](#)
- [*Kintana Accelerator Guides*](#)

Kintana Business Application Guides

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

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

User Guides

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

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide

- Navigating the Kintana Workbench:
Provides an overview of using the Kintana Workbench
- Navigating Kintana:
Provides an overview of using the Kintana (HTML) interface

Kintana Application Reference Guides

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

- Reference: Using Commands in Kintana
- Reference: Kintana Security Model

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

Kintana Instance Administration Guides

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

- Kintana Migration
- Kintana Licensing and Security Model

External System Integration Guides:

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

- Kintana Open Interface

Kintana Solution Guides

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

Kintana Accelerator Guides

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



Note

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

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

Kintana Services

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer

needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

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

Kintana Education

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

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

Kintana Support

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

<http://www.contori.com>

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

Chapter 2

Key Concepts and Definitions

This chapter defines the common concepts and terms in Kintana Deliver. A thorough understanding of these concepts and terms is necessary when using the Kintana Deliver interfaces.

Entity Definitions

This section describes the following key entities of Kintana Deliver functionality:

- *Packages*
- *Workflows*
- *Environments*
- *Workflow Steps*
- *Results*
- *Object Types*
- *Dashboard*
- *Portlets*
- *References*

Packages

Kintana Deliver is an enterprise application designed to deploy and audit software changes to mission critical applications. It does this by gathering all information required for a successful deployment (such as information on Environments and Objects to be migrated) into a single logical unit called the

Package. The Package, consisting of the migrating Objects, is then processed through a business Workflow. This results in a successful, easy-to-track software change.



A Package:

- Is the fundamental work unit of Kintana Deliver.
- Represents a logical unit of Objects that should be moved and tracked together.
- Contains all the information needed to process the Package, including the Package Lines, priority, and status.
- Specifies the Workflow to be used to deploy the change.
- Contains a list of all Objects to be tracked and/or migrated as the Package moves through its Workflow.

A Package consists of Objects, each of which is on a separate Package Line. While each line can be acted upon separately, the group of Package Lines and Objects represent a logical unit that should be moved and tracked together. The processing of a Package and Package Lines can vary greatly depending upon the Workflow specified for that Package. *Figure 2-1* shows a sample Package.

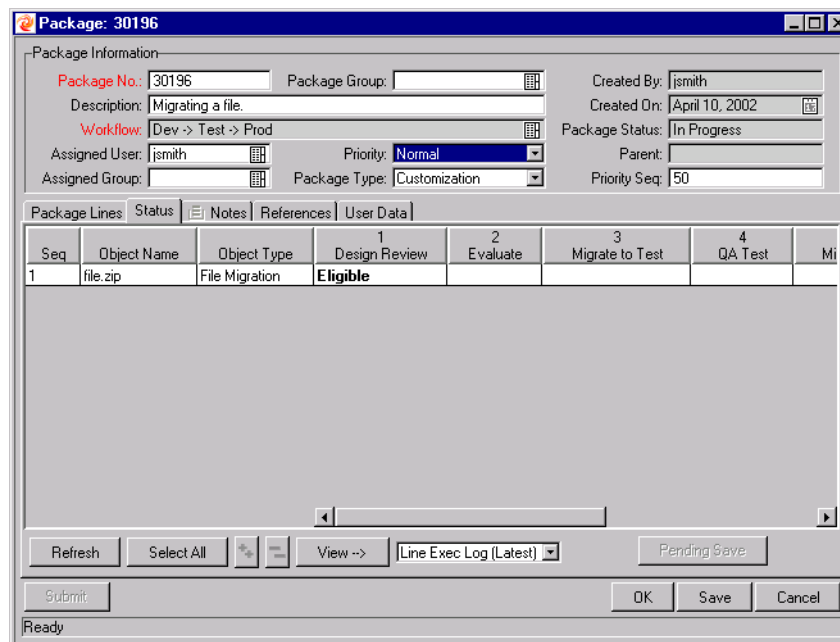


Figure 2-1 Sample Package

Workflows

A Workflow consists of a logical series of steps that define the path followed by Objects in a Package. Workflow configuration and routing is a customizable feature of Kintana Deliver and the Workflow engine can handle virtually any business practice. This allows a department to generate Workflows to automate existing processes, rather than forcing users to adopt a new set of processes to perform their work.

Workflow Steps can range in usage from functional approvals to actual migrations. For example, migration steps automatically move specified Objects from source Environments to destination Environments.

A sample Workflow is shown in *Figure 2-2*:

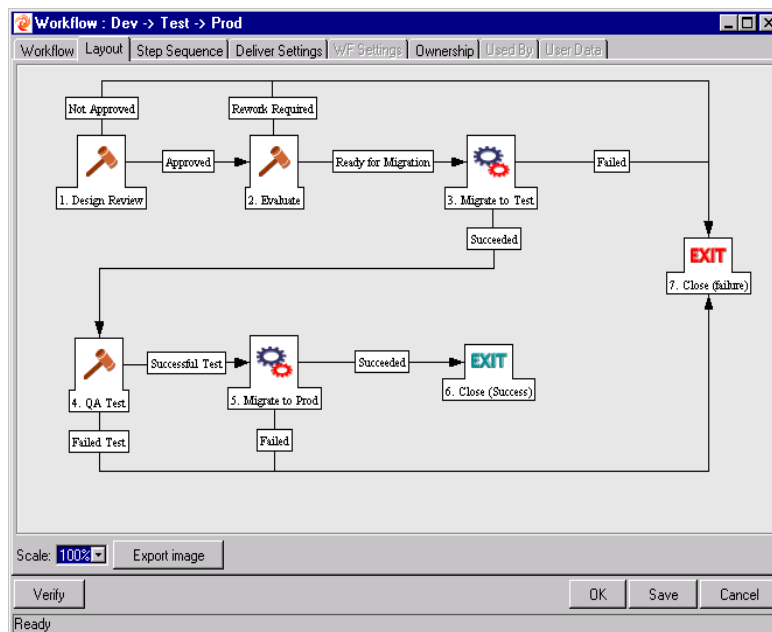


Figure 2-2 DEV -> TEST -> Prod Workflow

Environments

A Kintana Deliver Environment is composed of a unique combination of server, client, database, file system and Accelerator data that represents one logical group. For example, the 'DEV' Environment signifies the machines and database that represent the Development instance in the enterprise. One particular machine may be referenced by more than one Environment. For example, two Environments might have databases on the same UNIX machine.

One Environment could be used for DEVELOPMENT and the other Environment could be used for QUALITY CONTROL.



The terms server and client are defined very specifically for Kintana Deliver.

The Environment server represents the main host machine for the Environment. This machine may be of any platform type: UNIX, WindowsNT, etc. Typically, the server is a UNIX machine that also houses the database for this Environment.

The Environment client represents a remote client machine that also serves to identify the specified Environment. The client is typically defined when users are doing multi-platform development in a client/server Environment (with some development done on UNIX, and some on Windows NT). The client can correspond to a file server that stores client code accessed by users. Many programs, such as transactional forms, have both client and server components (the user interface code and the database Objects, respectively). A sample Environment is shown in *Figure 2-3*.

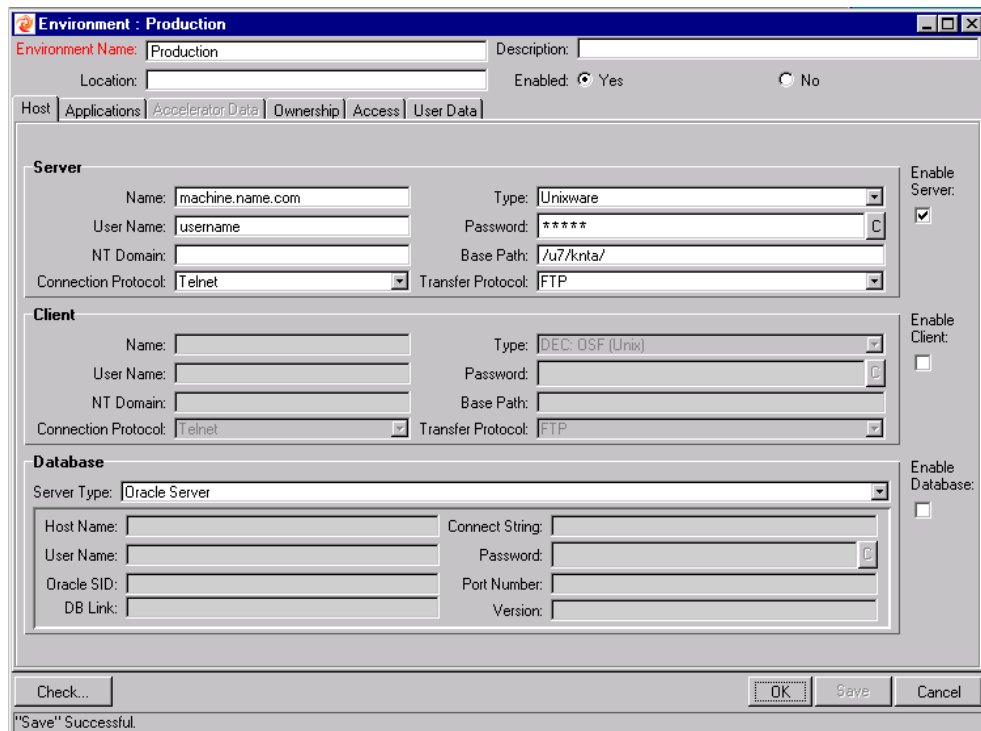


Figure 2-3 Sample Environment

Workflow Steps

Workflow Steps are events that are linked together to form a complete Workflow. Kintana Deliver uses three types of Workflow Steps: DECISIONS, EXECUTIONS, and CONDITIONS.

- DECISIONS are steps where a user or group of users need to indicate the result or outcome, such as an approval of work or an indication that a review has been completed. 'APPROVE MIGRATION' is an example of a Decision step.
- EXECUTIONS are steps where the Kintana system performs an action and then updates the step with its result. These actions can be as simple as calculating the value for a token or as complex as copying files, running programs, or updating Web pages.
- CONDITIONS are logic steps used for complex Workflow processing, such as allowing a Workflow to proceed only after all of the prerequisite steps are completed.
- WORKFLOWS are entire Workflows that have been enabled for use as Subworkflows. When modeling business processes that include predefined procedures, Subworkflows are a useful time saver.

The WORKFLOW STEP SOURCES window is shown in [Figure 2-4](#).

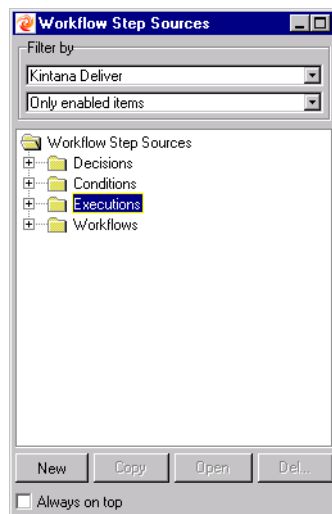


Figure 2-4 Workflow Step Sources Window

Results

A single step can have multiple valid results which manage the Workflow. For example, the 'APPROVE MIGRATION' step can have two results: **APPROVED** or **NOT APPROVED**. Depending on the Workflow configuration, these results route the Objects differently through the Workflow. Results are user-defined.



As shown in *Figure 2-2*, once the status of the 'DESIGN REVIEW' step becomes Approved, the status of the "EVALUATE" step becomes eligible. If, however, the status becomes NO, the 'EXIT - CLOSE (FAILURE)' step becomes eligible.

Object Types

The Object Types Workbench allows users to define the different types of entities they want to control and migrate. Every Object Type has a unique set of parameters that determines the information it requires, as well as any additional information it may accept. Each Object Type can also have associated Commands which determines its behavior as it moves from one Environment to another. Commands are used to define what a migration means for each type of Object. For example, a FILE Object Type might only require the copying of a file while a DATABASE SCRIPT Object Type might require both copying of a file as well as executing it against the destination database.

Different types of organizations have different requirements for their IT business processes. The Kintana Accelerator initiative has been designed to address these differences. Each Accelerator provides a set of additional Object Types that can be imported to address specific needs for a particular integration or business process. For example, the Accelerator for Oracle Applications includes predefined AOL and GL Object Types which are used to migrate Oracle Apps AOL and General Ledger set-up entities, respectively. For more information on Kintana Accelerators, refer to the Products section on the Kintana Web site (<http://www.kintana.com>).

Object Types are user-configurable. Kintana Deliver and its Accelerators also provide libraries of pre-defined Object Types, falling under one of the following categories:

- *Standard Objects*
- *Custom Objects*
- *Kintana Migrator Objects*

Standard Objects

Standard Objects are predefined Object Types that are shipped with Kintana Deliver or its Accelerators. These Object Types encapsulate the basic functionality that manages crucial Kintana Deliver actions: migrating and executing file-system level objects and operating-system commands, applying patches to an Oracle Applications instance, etc. A simple standard Object Type is the FILE MIGRATION object, which copies a file from one Environment to another. A more complex standard Object Type is the SQL SCRIPT, which not only copies the file but also executes the script against the destination database.

Custom Objects

Customers will often need to customize standard Object Types, or produce entirely new Object Types, in order to handle the requirements of their software environments and change management processes. A Custom Objects category is provided to help distinguish these customized Object Types from those that come standard with Kintana Deliver or its Accelerators. Such Object Types may have been designed by the customer or by Kintana consultants, and are often used for integration with specific third-party tools or in-house products.

Kintana Migrator Objects

Kintana Migrator Objects are Object Types that contain functionality to export and import Kintana configuration information. These may be used for several purposes: to transfer configuration information between distinct Kintana instances/installations, to extract information from a Kintana database schema into an XML file, or to load information from an XML file into a Kintana database schema. This means that you can migrate Kintana configuration information using standard Kintana Deliver test practices: processing a Package through a Workflow.

A sample Object Type is shown in [Figure 2-5](#).

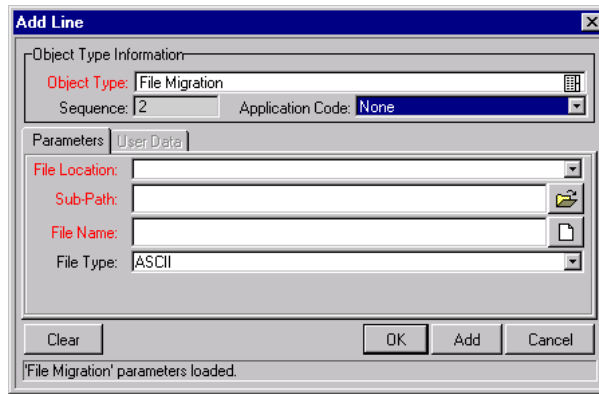


Figure 2-5 Sample Object Type

Dashboard

The Kintana Dashboard consists of a set of configurable, role-based visual displays called portlets that provide relevant summary information. Users can drill down to any desired level of detail. The Dashboard displays the true status of the initiatives, based on current data captured automatically when the work is performed.

The Kintana Dashboard is designed for use by participants throughout the Technology Chain. For example, developers can use the Kintana Dashboard to view all their own action items, and end-users can consult their own Dashboards to see the status of all the Requests they have submitted. Tabs in the Kintana Dashboard interface allow users to group portlets according to their own needs. To save time in configuration, your Kintana Administrator can define a default Dashboard layout for all users.

The Kintana Dashboard is a separately licensed product. Contact your Kintana Administrator for information concerning the Kintana Dashboard at your site.

A sample Dashboard configuration is shown in [Figure 2-6](#).

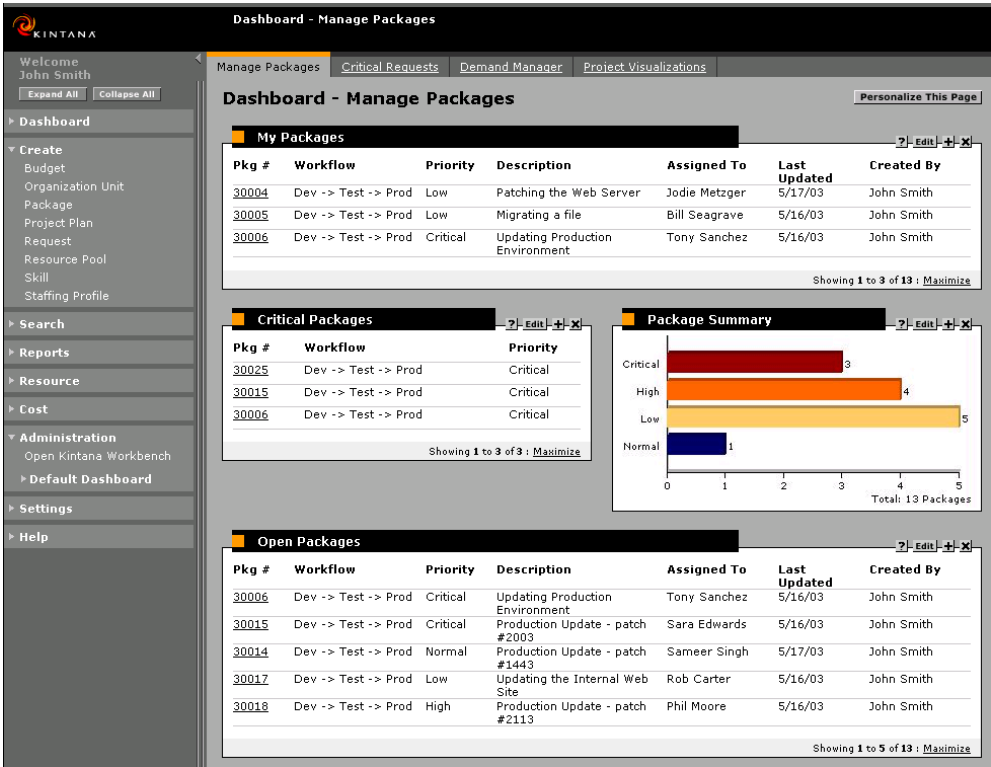


Figure 2-6 Sample Dashboard Configuration

Portlets

Portlets are configurable, role-based visual displays that provide relevant summary information of your business data. Each user can select which portlets they would like to display on their Dashboard. They can then personalize those portlets to display only the information that is relevant to their Projects, Tasks, Packages or Requests.

In addition to providing relevant information for higher visibility, portlets also provide the user with the ability to drill down into the details of the Project, Task, Request or Package. This enables the user to access and update information from a single Web page.

Kintana features a set of portlets for each Kintana product. These portlets are designed to provide the most efficient and flexible access to your business data. It is also possible for advanced users to create custom portlets for further adaptability.



Note

You can only add portlets to your Dashboard which are associated with the Kintana products licensed at your site. For a full list of the available Kintana portlets, see "[Using the Kintana Dashboard](#)".

A sample Portlet is shown in [Figure 2-7](#).

My Packages							?	Edit	+	X
Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By				
30004	Dev -> Test -> Prod	Low	Patching the Web Server	Jodie Metzger	5/17/03	John Smith				
30005	Dev -> Test -> Prod	Low	Migrating a file	Bill Seagrave	5/16/03	John Smith				
30006	Dev -> Test -> Prod	Critical	Updating Production Environment	Tony Sanchez	5/16/03	John Smith				

Showing 1 to 3 of 13 : [Maximize](#)

Figure 2-7 Sample Portlet

References

In addition to header and detailed field information, Packages can have references to other entities or points of information that allow for easy access and visibility to related data. Summary information for References is viewed as part of the Package. Each reference can be viewed in detail with a simple click of the mouse. There are several reference types defined in Kintana Deliver: ATTACHMENT, PACKAGE, PROJECT, RELEASE, REQUEST, TASK, and URL. Sample References are shown in [Figure 2-8](#).

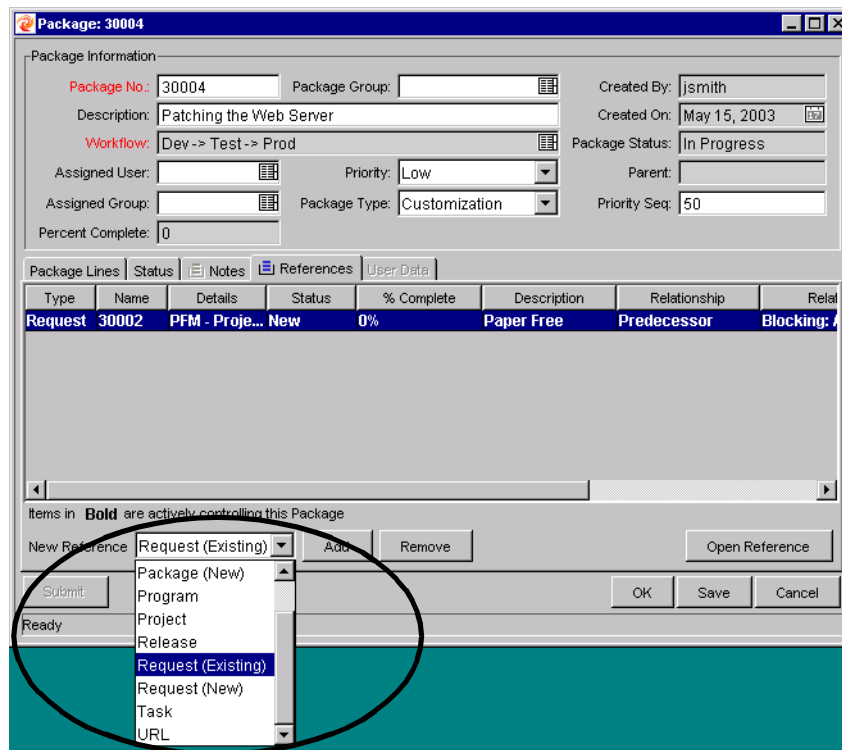


Figure 2-8 Package References

Package

You can add a reference to a Package to relate to other Packages. References to the Package(s) are automatically generated, establishing a two-way tie between the referenced Package(s) and the original.

In addition to referencing existing Packages, you can also create a new Package to be referenced from the **REFERENCES** tab. You can then specify a relationship (informational or dependent) between the Package and the new reference.

Request

You can add a reference to a Package to relate to Requests. In addition to referencing existing Requests, you can also create a new Request to be referenced from the **REFERENCES** tab. You can then specify a relationship (informational or dependent) between the Package and the new reference.

For Packages that were spawned from a Request Workflow step, reference to the Request is automatically generated, establishing a two-way tie between the spawned Package and the Request.

Release

You can reference a Package to a given Release. For Packages already associated with a given Release, reference to the Release is automatically generated, establishing a two-way tie between the Package and the Release.

Attachment

You can attach a file from your local machine to the current Package. The attached file is copied to the server and can then be accessed by other Kintana Deliver users. This feature is particularly helpful when you need to reference a document that is not already Web-accessible.

Document URL

You can reference an unlimited number of document URLs to a given Package. Document URLs need to be Web-accessible and are attached by simply entering the Web address of the document. Once attached, the document URLs can be opened by selecting the Reference.

Task

You can attach the current Package to a Task in a Kintana Drive Project. The Task is then associated with this Package. Using Kintana Drive, you can then set dependencies between the Package and the Task.

Project

You can attach the current Package to a Kintana Drive Project. The Project is then associated with this Package.

Displaying Kintana Data

As more of your business processes and solutions are modeled on the Kintana Product Suite, the data in the system will grow.

 Example

You may use Kintana to automate 200 different processes — thus potentially introducing 200 Workflows into Kintana. Sifting through 200 entries in an auto-complete list or 200 search results could be cumbersome.

Additionally, an employee in a company's IT division does not need to work with Requests or Packages relating to Marketing or Finance. It may be advantageous to keep such extraneous information from showing up every time an auto-complete or search is run.

The Kintana Product Suite can be configured to display only information that is most relevant to your business role. Depending on this configuration and the access grants you have been given by your Kintana Administrator, some Kintana data will not display when, for instance, you click on an auto-complete list or perform a search for a particular entity.

 Example

A Project Manager and a Software Developer will each have different access grants. Each sees different sets of Workflows when clicking on auto-complete lists or running searches, with each set suited to their particular business role.

For more information on access grants and Kintana data, refer to the "[Kintana Security Model](#)".

Chapter
3**Accessing Kintana Deliver**

Kintana Deliver is a Java based, Web-enabled software system. The software can be executed using certain Java-enabled Web browsers, such as Netscape Communicator 7.02+, or Microsoft Internet Explorer 5.0+.

The Kintana Product Suite features two interfaces: the standard Kintana interface and the Kintana Workbench interface. The Kintana interface uses HTML and Javascript to provide users with access to many key areas of functionality, such as approving Packages and running reports.

The Kintana Workbench is a Java applet designed to help Kintana Administrators, product configuration experts, and Power Users to perform advanced configuring and processing tasks, such as creating Packages, Object Types and Workflows.

Kintana Deliver users will interact mostly with the Kintana Workbench. The following sections provide instructions for logging onto Kintana and launching the Workbench:

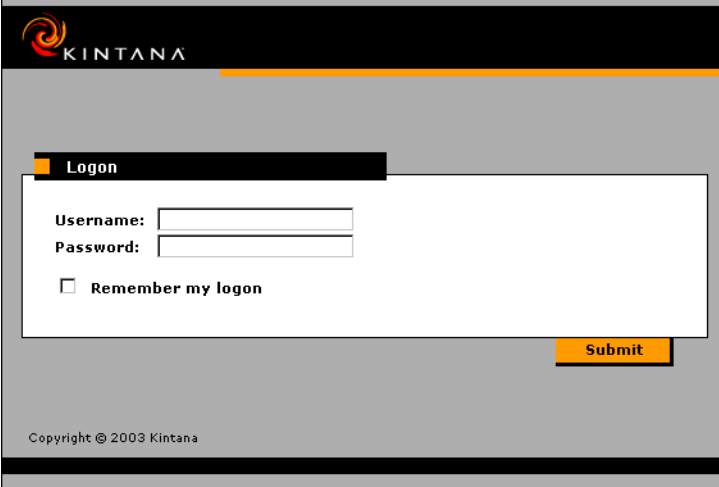
- [*Logging on to Kintana*](#)
- [*Launching the Kintana Workbench*](#)
- [*Downloading Kintana Workbench Files*](#)

Logging on to Kintana

Kintana is accessed using a Web browser over a network. To access Kintana:

1. Contact your Kintana Administrator or Webmaster to obtain the URL where Kintana is installed.

2. Enter the information in the LOCATION or ADDRESS field of your Web browser. The Kintana LOGON page opens.



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3. Enter your USERNAME and PASSWORD in the corresponding fields in the Kintana LOGON page. Contact your System Administrator to obtain your passwords and permissions.

If you want Kintana to retain your password information, click the REMEMBER MY LOGON check box. After clicking this check box, you will not be required to enter your password again until your Kintana session times out.

4. Click **SUBMIT**.

If you enter an incorrect password, you will be prompted to correct it. Re-enter the logon information and click **SUBMIT**.

5. KINTANA opens.

Dashboard - Manage Packages

My Packages

Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
30004	Dev -> Test -> Prod	Low	Patching the Web Server	Jodie Metzger	5/16/03	John Smith
30005	Dev -> Test -> Prod	Low	Migrating a file	Bill Seagrave	5/16/03	John Smith
30006	Dev -> Test -> Prod	Critical	Updating Production Environment	Tony Sanchez	5/16/03	John Smith

Showing 1 to 3 of 12 : Maximize

Critical Packages

Pkg #	Workflow	Priority
30015	Dev -> Test -> Prod	Critical
30006	Dev -> Test -> Prod	Critical

Showing 1 to 2 of 2 : Maximize

Package Summary

Priority	Count
Critical	2
High	4
Low	5
Normal	1

Total: 12 Packages

Open Packages

Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
30006	Dev -> Test -> Prod	Critical	Updating Production Environment	Tony Sanchez	5/16/03	John Smith
30015	Dev -> Test -> Prod	Critical	Production Update - patch #2003	Sara Edwards	5/16/03	John Smith
30014	Dev -> Test -> Prod	Normal	Production Update - patch #1443	Sameer Singh	5/16/03	John Smith
30017	Dev -> Test -> Prod	Low	Updating the Internal Web Site	Rob Carter	5/16/03	John Smith
30018	Dev -> Test -> Prod	High	Production Update - patch #2113	Phil Moore	5/16/03	John Smith

Showing 1 to 5 of 12 : Maximize

Note

The initial KINTANA page may appear differently at your site, depending on your system data and default configuration. The various portlets might not contain information until you personalize them.

Tip

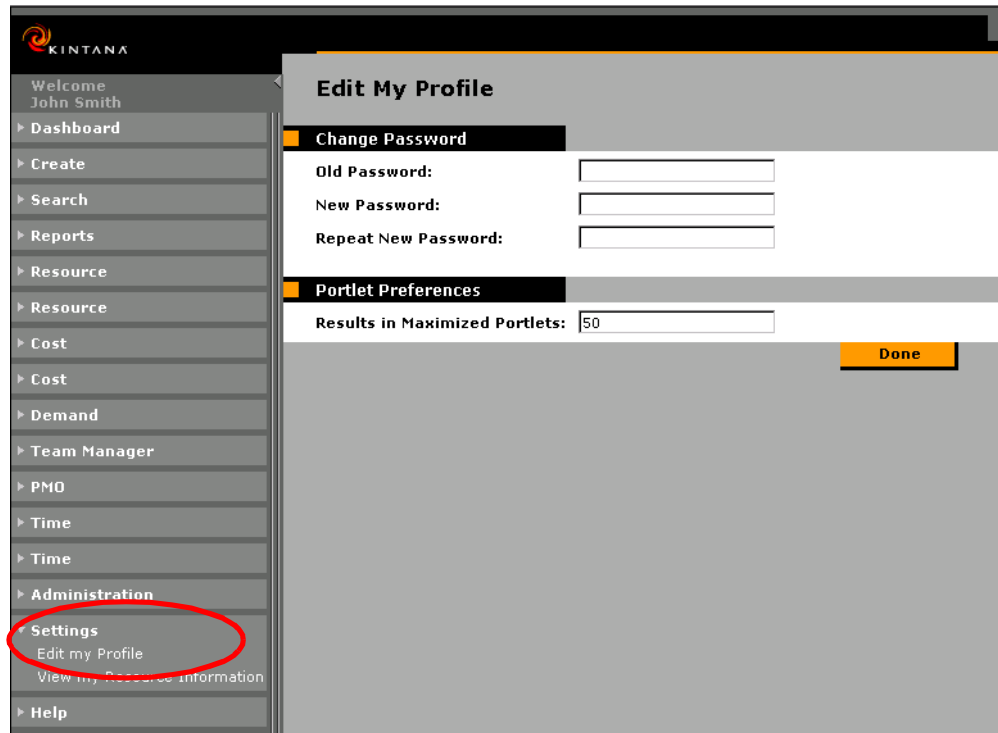
If you have licensed the Kintana Dashboard, you receive the benefit of additional portlets that offer a more comprehensive view of Kintana data. For more detailed information, see ["Using the Kintana Dashboard"](#).

Changing Your Password

After logging onto Kintana, you may wish to change your password.

To change your password in Kintana:

1. From the Kintana menu bar, select **SETTINGS -> EDIT MY PROFILE**.



2. Enter your old password in the OLD PASSWORD field.
3. Enter your new password in both the NEW PASSWORD and REPEAT NEW PASSWORD fields.
4. Click **DONE**.

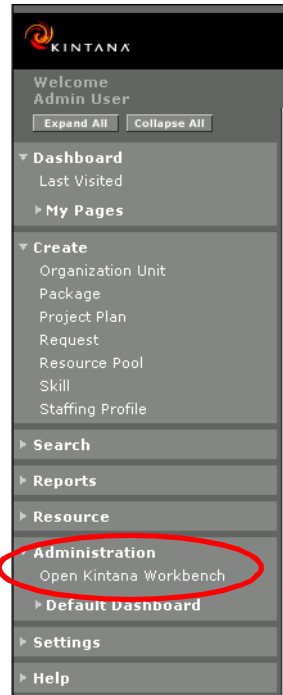
You will receive an error message if:

- You did not enter your old password correctly.
- The NEW PASSWORD and REPEAT NEW PASSWORD fields do not contain the same exact entry.
- The new password you entered is identical to your old password.

If you do not receive an error message, your password has been accepted by the system.

Launching the Kintana Workbench

The Kintana Workbench is accessed from the navigation bar in the Kintana interface. Users with a Power license can launch the Workbench by clicking the **ADMINISTRATION > OPEN KINTANA WORKBENCH** menu item in the navigation bar.



Note

If you have installed a pop-up blocker in your web browser, the Kintana Workbench will not open.

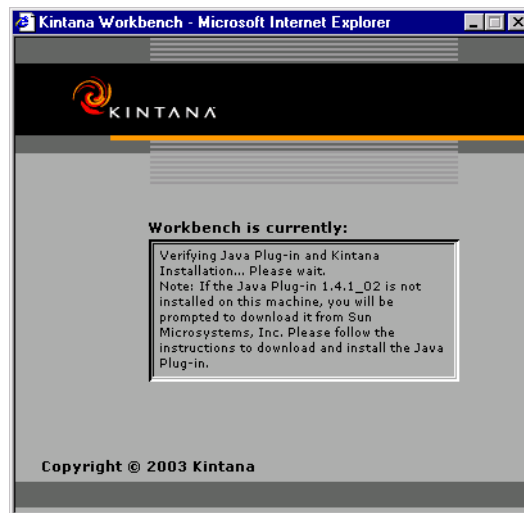
Downloading Kintana Workbench Files

The first time you access the Kintana Workbench across a network, the entire application will need to be downloaded onto your computer. Make sure to follow all instructions given by the browser and logon screen during this download process.

Subsequently, the program will only download if there is a new version on the server. For this reason it is recommended that the first time you run the Kintana Workbench on a computer, you do so across a network with bandwidth of at least 56 kbps.

There is no need to install the Kintana Workbench on each machine on which it is used. The first time a user accesses the Workbench after an installation or an upgrade, the necessary files are downloaded onto the client's computer. This means that following an installation or upgrade, the Workbench will take longer to launch than it would under normal operating conditions.

Launching the Kintana Workbench will open a small browser window that will indicate the current state of the Workbench. It will display any download or installation activities and will indicate when the Workbench has become active. This window must remain open for the duration of your Workbench session. Closing this window will close the Workbench window.



Chapter
4**Creating New Packages**

Kintana Deliver users create new Packages in the Kintana Workbench interface. The Deliver Workbench contains the functionality used for adding and configuring the information needed to create a Package. This chapter discusses the following procedures:

- *“Creating New Packages”* on page 35
- *“Submitting a Package”* on page 73

Creating New Packages

Kintana Deliver users are primarily concerned with managing their company’s mission critical applications. These applications include the following:

- eCommerce/eBusiness applications (such as Siebel, Broadvision or Ariba)
- ERP system (such as Oracle Applications, SAP or PeopleSoft)
- Customized applications

The key aspects of managing these applications includes implementing new functionality, customizing application features and resolving software bugs. All of these system updates can be organized and processed through a Kintana Deliver Package.

The Package routes the application updates through a defined business process, which can be configured to include testing, approvals and other business standards. These business processes are defined in a Kintana Deliver Workflow. Workflows are typically defined during system configuration and modified by your Kintana business configuration users as needed.



Note

Users who are involved in moving a Package through a Workflow are considered to be ‘Participants’ in that Package. A Participant can be the ‘Assigned To’ user, a member of the assigned group, the creator of the Package, or a member of a Security Group associated with any of the Workflow Steps contained in the Workflow. Depending on the settings configured by the Kintana business configuration expert, a Package may not be visible to users who are not Participants in its Workflow. This means users will only see Packages relevant to their business role in their organization. Additionally, users running Reports will only see information for Packages for which they are considered to be Participants.

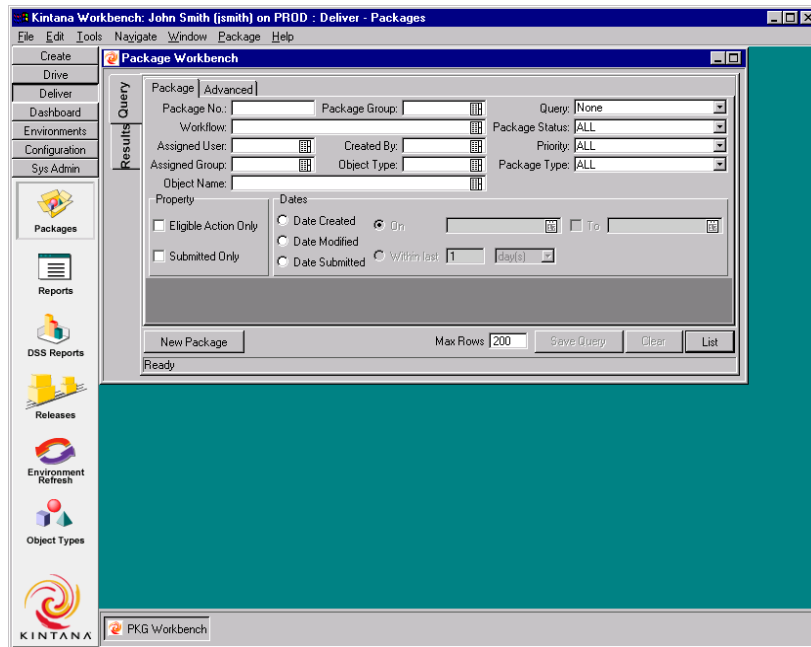
Refer to the following related topics for step-by-step instructions on creating Packages:

- [“Defining a Package”](#) on page 36
- [“Adding Multiple Package Lines Simultaneously”](#) on page 42
- [“Adding a Reference”](#) on page 46
- [“Copying an Existing Package”](#) on page 62
- [“Merging Packages”](#) on page 64
- [“Generating a New Package Group”](#) on page 67
- [“Editing a Package Group”](#) on page 68
- [“Selecting a Workflow for a Package”](#) on page 69
- [“Submitting a Package”](#) on page 73

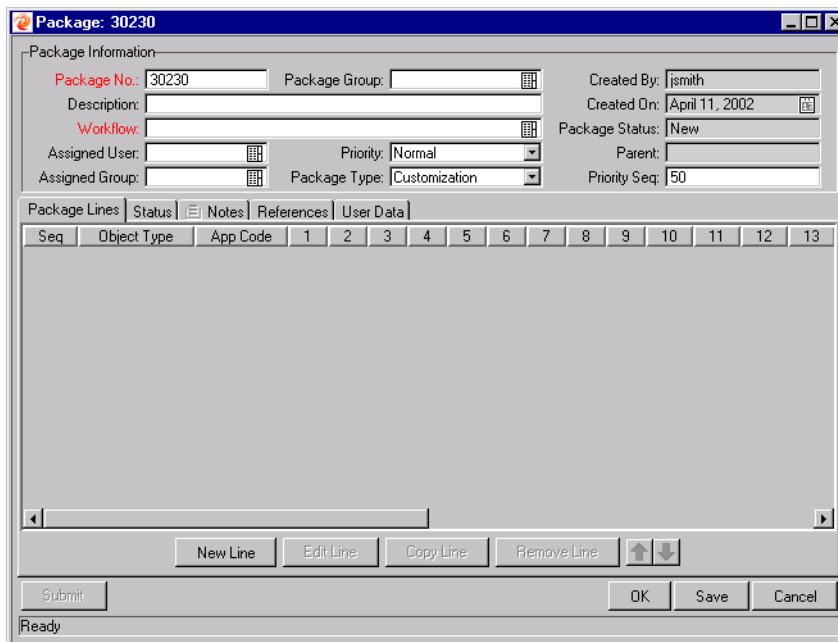
Defining a Package

For each instance of a software migration submission, a new Kintana Deliver Package needs to be created. To define a new Package:

1. Open the Kintana Workbench.
2. Click **DELIVER** in the shortcut bar and click the **PACKAGES** icon. The **PACKAGE WORKBENCH** opens.



3. Click **NEW PACKAGE** on the **PACKAGE WORKBENCH** or select **FILE -> NEW PACKAGE** from the menu. A blank **PACKAGE** window opens.



4. Enter a description in the **DESCRIPTION** field, select a **WORKFLOW**, and enter any additional information that you would like to capture in the Package fields.

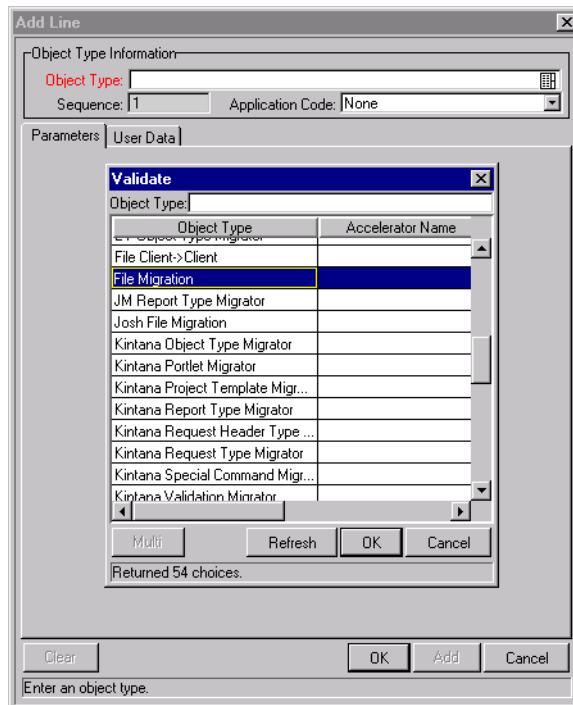
After entering information in the Package fields, add one or more Package Lines to the Package. Package Lines capture information specifically related to each object that you are migrating/tracking as the Package proceeds through the Workflow.

5. Click **NEW LINE** to add a Package Line. The ADD LINE window opens. The fields on this window let you enter Object Type specific information.

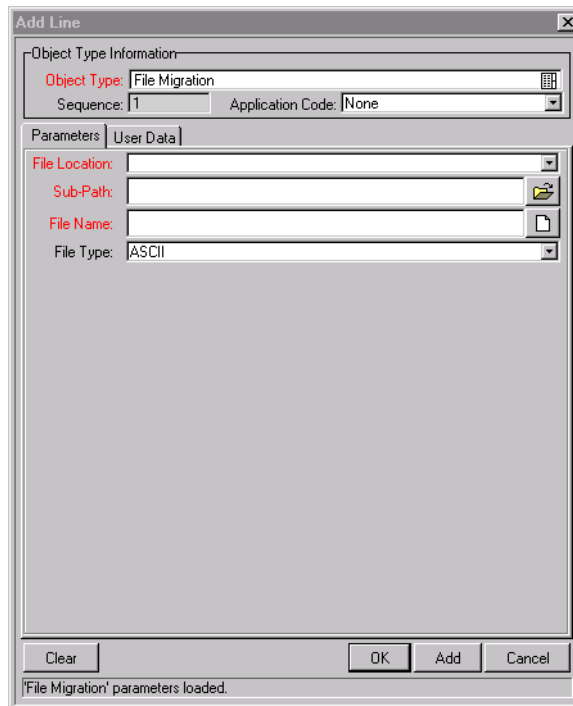
6. Select the Object Type, for the item that you would like to migrate, from the OBJECT TYPE field.

If you don't know which Object Type you would like to use or you would like to view all of the possible choices, you can search for an Object Type. To search for and select an Object Type:

- a. Click the auto-complete icon to open the Object Type VALIDATE window. You can also type a full or partial name in the OBJECT TYPE text field, before clicking the auto-complete icon, to find the Object Type you want to select.



- b. Select the appropriate Object Type from the list and click **OK**. The **VALIDATION** window closes and the **PARAMETERS** tab in the **ADD LINE** window is dynamically updated and displays information fields corresponding to the selected Object Type.



The screenshot shows a dialog box titled "Add Line". It has a close button (X) in the top right corner. The dialog is divided into several sections:

- Object Type Information:** Contains a text field for "Object Type" with the value "File Migration", a text field for "Sequence" with the value "1", and a dropdown menu for "Application Code" with the value "None".
- Parameters:** A tabbed section with two tabs: "Parameters" (selected) and "User Data". Under "Parameters", there are four fields: "File Location" (text field), "Sub-Path" (text field with a folder icon), "File Name" (text field with a document icon), and "File Type" (dropdown menu with "ASCII" selected).
- Buttons:** At the bottom, there are four buttons: "Clear", "OK", "Add", and "Cancel".
- Status Bar:** At the very bottom, it says ""File Migration" parameters loaded."

7. Fill in the fields on the **PARAMETERS** tab. If the **USER DATA** tab is enabled, fill in the fields for that tab as well. Only the fields displayed in red are required, but you are encouraged to fill out the tabs as completely as possible.
8. Click **OK** to put the current Package Line into the Package and close the **ADD LINE** window. Click **ADD** to put the current Package Line into the Package and clear the screen to add additional Object Types in the **ADD LINE** window.

The screenshot shows the 'Package: 30230' window. The 'Package Information' section includes fields for Package No. (30230), Package Group, Description (Migrating a file.), Workflow (Dev -> Test -> Prod), Assigned User, Assigned Group, Priority (Normal), Package Type (Customization), Created By (jsmith), Created On (April 11, 2002), Package Status (New), Parent, and Priority Seq (50). Below this is a 'Package Lines' table with columns for Seq, Object Type, App Code, and four numbered columns (1-4). The first row contains: 1, File Migration, (None), File Location: Client, Sub-Path: D:/temp, File Name: file.zip, File Type: Binary. At the bottom are buttons for New Line, Edit Line, Copy Line, Remove Line, Submit, OK, Save, and Cancel.

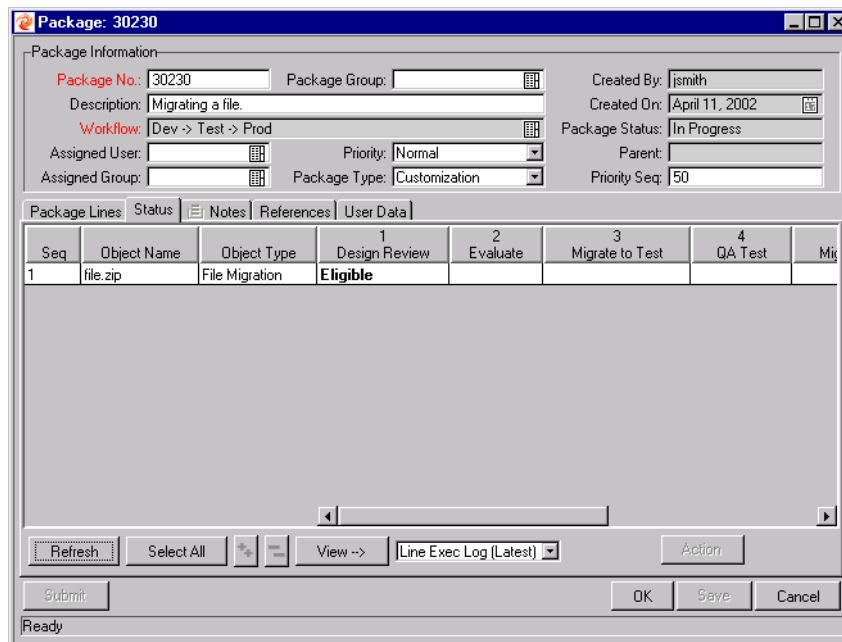
Seq	Object Type	App Code	1	2	3	4
1	File Migration	(None)	File Location: Client	Sub-Path: D:/temp	File Name: file.zip	File Type: Binary

9. Click the **NOTES** tab and enter any additional information that would be useful for the Package. This field is not required, but it can be used to produce more robust reports and increase Package tracking information and accountability.

The screenshot shows the 'Package: 30230' window with the 'Notes' tab selected. The 'Package Information' section is identical to the previous screenshot. The 'Notes' section is divided into 'Existing Notes' and 'New Notes' areas, both of which are currently empty. An 'Enlarge' button is located between these two areas. At the bottom are buttons for Submit, OK, Save, and Cancel.

10. If User Data has been defined, the **USER DATA** tab is enabled. Click the **USER DATA** tab and fill in the appropriate fields.
11. To save the Package information without submitting it to the Workflow, click **SAVE**.
12. Click **SUBMIT** to submit the Package to the Workflow.

Submitting the Package to the Workflow generates entries under the **STATUS** tab for each of the Workflow Steps defined for the Workflow. As each step in the Workflow is ready to be processed, the step shows an **ELIGIBLE** status. You can view the progress of each Package Line by clicking the **STATUS** tab.



13. Click **OK** to close the PACKAGE window.

Adding Multiple Package Lines Simultaneously

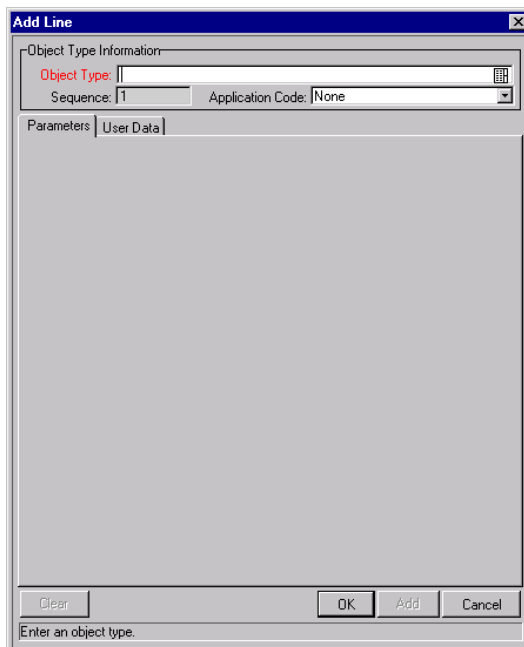
In some instances, you can add multiple Package Lines from a single ADD LINE window. Multiple Package Lines can be added with different parameters for a given Workflow and Object Type. You can add multiple Package Lines simultaneously when the following conditions exist:

- Package Lines all follow the same Workflow and use the same Object Type.

- The Object Type Parameters include at least one auto-complete list field with an enabled **MULTI** button.

The following example illustrates how to add multiple Package Lines simultaneously. The user is creating a new Package using a Workflow named DEV -> TEST -> PROD.

1. In the Deliver PACKAGE window (in the KINTANA WORKBENCH), click **NEW LINE**. The ADD LINE window opens.

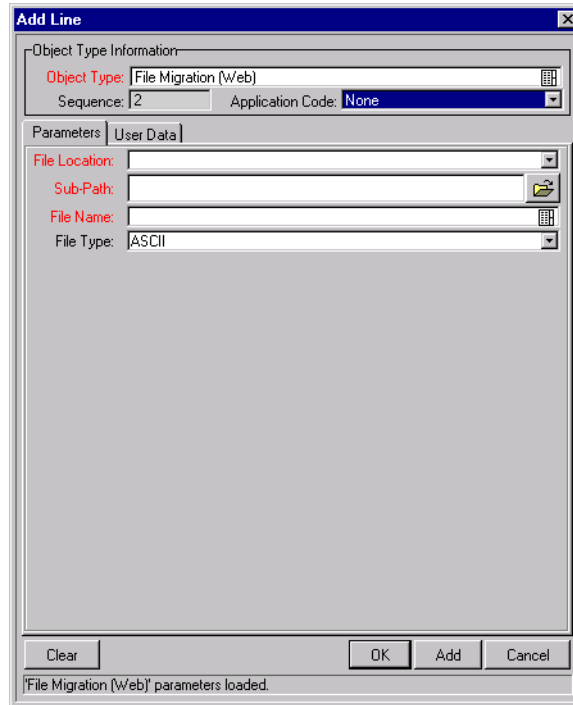


2. Select **FILE MIGRATION (WEB)** from the OBJECT TYPE field. The Object Type specific parameters are dynamically displayed.

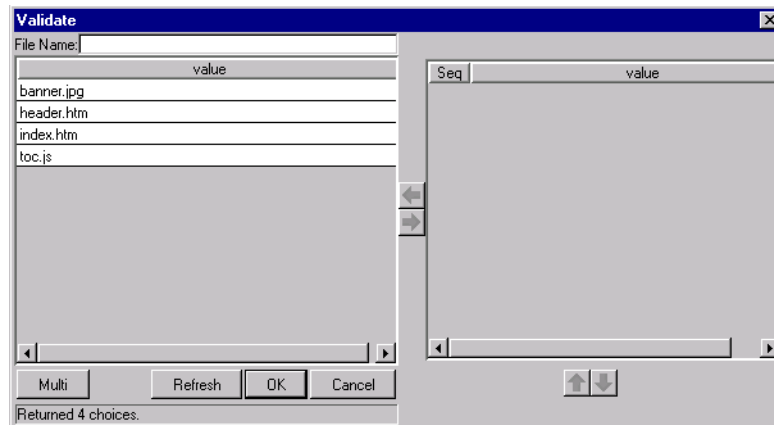


Note

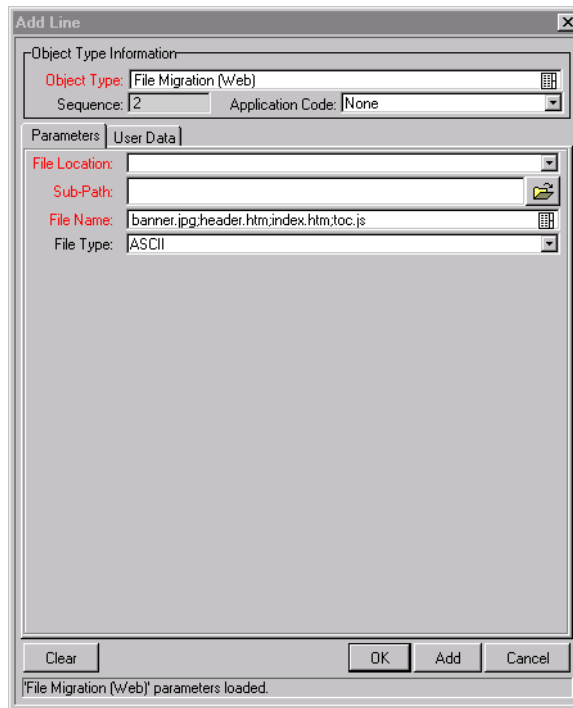
The FILE MIGRATION (WEB) Object Type was constructed for this example. You can select any Object Type with an enable multi auto-complete list parameter.



3. Click the FILE NAME auto-complete list. The following VALIDATE window opens.

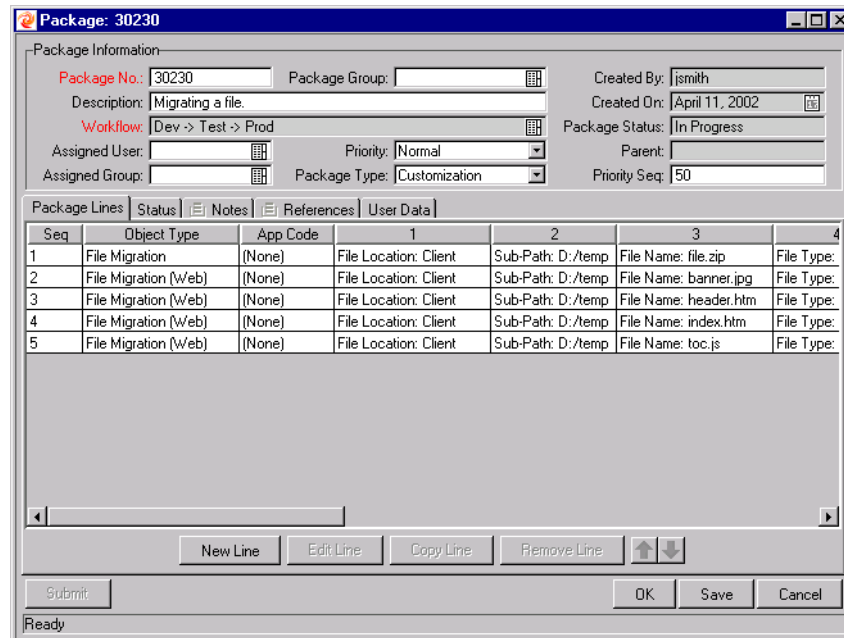


4. Double-click or select all desired entities and click the right arrow to move them to the right hand selection box.
5. Click **OK** to accept your multiple selections and close the window. Notice that the items that you selected in the VALIDATE window are listed in the FILE NAME field and separated by commas.



6. Click **ADD**.

A new Package Line is created for each parameter you specified in the VALIDATE window. These lines are then processed through the selected Workflow.





Note

You can only select **MULTI** for objects that use an auto-complete or file chooser window to select the object name. All other parameters for that object are assumed to be identical.

Adding a Reference

You can add a reference to a Package from the Workbench or the Kintana interface. There are several reference types defined in Kintana Deliver: ATTACHMENT, PACKAGE, PROJECT, RELEASE, REQUEST, TASK, and URL. For some reference types, such as for Requests and other Packages, you can create a functional dependency to the reference. For example, you can specify that a Request is a “Predecessor” to the Package. This means that the Package will not continue until the Request closes.

To add a Reference to a new or existing Package from the Workbench:

1. Within the PACKAGE window, click the **REFERENCES** tab.
2. Select the type of reference to be generated from the NEW REFERENCE drop down list and click **ADD**.

The following sections provide instructions for referencing different entities from the Package:

- [“Attaching Requests”](#) on page 47
- [“Attaching Packages”](#) on page 50
- [“Attaching Releases”](#) on page 54
- [“Attaching Projects”](#) on page 55
- [“Attaching Tasks”](#) on page 57
- [“Adding an Attachment”](#) on page 59
- [“Adding a URL”](#) on page 60



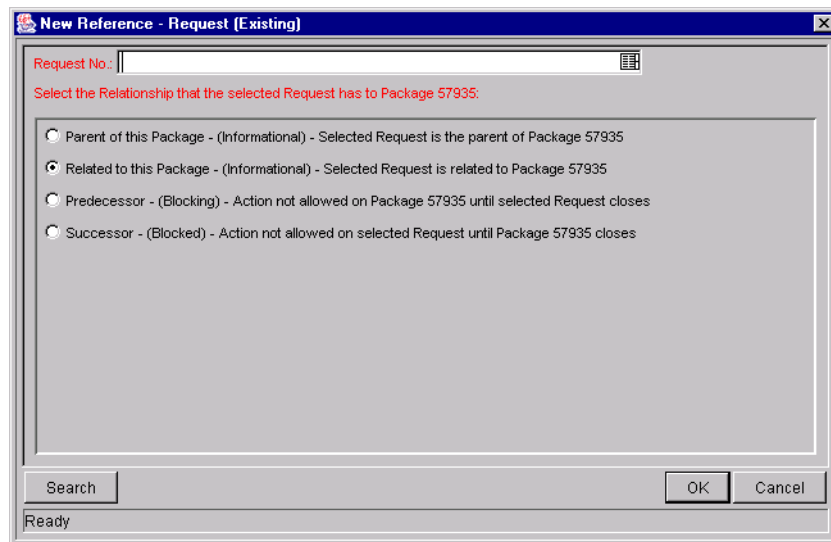
Note

The following procedures detail how to add References to a Package from the Kintana Workbench. The procedure for adding References from the Kintana (HTML) interface uses the same fields and dependencies.

Attaching Requests

To attach Requests to a Package:

1. Open the PACKAGE window.
2. Click the **REFERENCES** tab
3. Click the NEW REFERENCE drop down list.
4. Select **REQUEST (EXISTING)** from the drop down list.
5. Click **ADD**. The NEW REFERENCE - REQUEST (EXISTING) window opens.



6. To select a Request for an attachment, use one of the following methods:
 - Enter the Request Number in the REQUEST NO. field or click the REQUEST NO. auto-complete list to locate and select the Request in a VALIDATE window. (Hold down **CTRL+CLICK** or **SHIFT+CLICK** to select more than one Request.) The selected Request displays in the REQUEST NO. field. If you selected multiple Requests, they all display in the REQUEST NO. field separated by semi-colons.
 - Click **SEARCH** to search for Requests in a separate query window and follow the procedure in *“Searching for Requests to Attach”* on page 48.

7. Select the type of relationship you want to assign between the Package and its attachment by selecting the appropriate radio button. See [Table D-5 on page 19](#) for a description of the various relationships that can be assigned.
8. Click **OK**. You return to the **REFERENCES** tab in the PACKAGE window. The new attached Request displays as a Reference.
9. Click **OK** to save the attached Request as a Reference and close the PACKAGE window.
10. Click **SAVE** to save the attached Request as a Reference in the Package without closing the PACKAGE window.

Searching for Requests to Attach

This procedure lets you use additional criteria and expand the search capability for Requests to attach to a Package.

1. From the NEW REFERENCE - REQUEST (EXISTING) window, click **SEARCH**. The REQUEST SELECTION window opens.

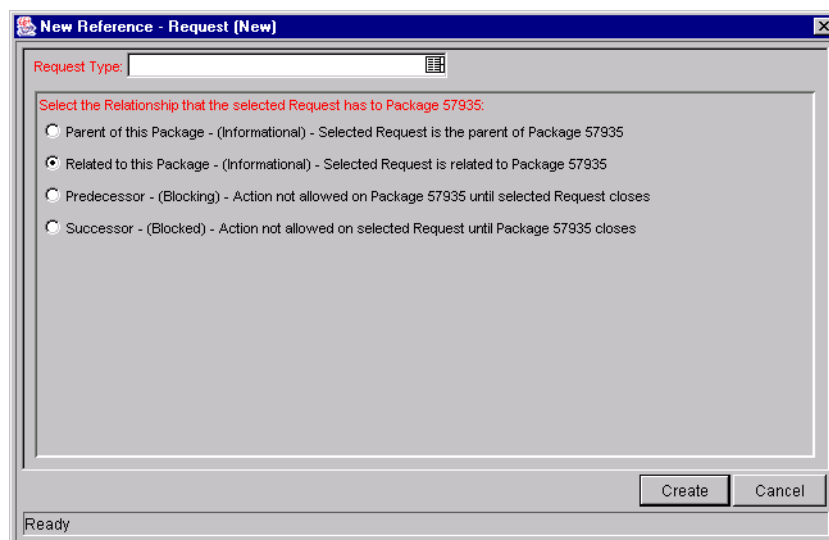
2. Query for the Request(s) you want to use by entering search criteria in the appropriate fields.

3. Click **LIST**. The Requests that match your search criteria display in the QUERY RESULTS section of the window.
4. Select the Request(s) in the QUERY RESULTS section that you want to attach to the Package.
5. Select the type of relationship you want to assign between the Package and its attachment from the SELECT RELATIONSHIP FOR NEW REFERENCES drop down list. See [Table D-5 on page 19](#) for a description of the various relationships that can be assigned.
6. Click **OK** to attach the Request(s) to the Package and close the current window. You return to the **REFERENCES** tab in the PACKAGE window.
7. After you return to the PACKAGE window, the new attached Request displays as a Reference.
8. Click **OK** to save the new Reference and close the PACKAGE window.
9. Click **SAVE** to save the new Reference in the Package without closing the PACKAGE window.

Creating a New Request

A new Request can be created from a Package's **REFERENCES** tab.

1. Select **REQUEST (NEW)** from the REFERENCE TYPE drop down list and click **ADD**. The NEW REFERENCE - REQUEST (NEW) window opens.

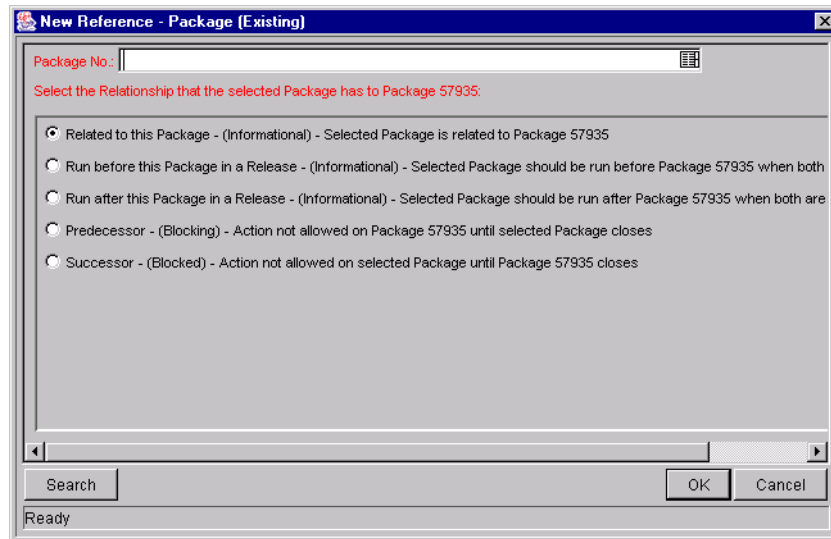


2. Select a Request Type from the REQUEST TYPE auto-complete list and a relationship from the available radio buttons.
3. Click **CREATE** to create the new Request. A browser window opens the the CREATE REQUEST page. The new Request's DESCRIPTION field is defaulted to the Package's description. Fill in all required Request fields and any optional fields.
4. Click **SUBMIT**. The CREATE REQUEST page closes and returns you to the **REFERENCES** tab in the PACKAGE window. The newly created Request displays as a Reference.
5. Click **OK** to save the Request as a Reference and close the PACKAGE window.
6. Click **SAVE** to save the Request as a Reference in the Package without closing the PACKAGE window.

Attaching Packages

To attach Packages to a Package:

1. Open the PACKAGE window.
2. Click the **REFERENCES** tab
3. Click the NEW REFERENCE drop down list.
4. Select **PACKAGE** from the drop down list.
5. Click **ADD**. The NEW REFERENCE - PACKAGE (EXISTING) window opens.



6. To select a Package for an attachment, use one of the following methods:
 - Enter the Package Number in the PACKAGE NO. field or click the PACKAGE NO. auto-complete list to locate and select the Package in a VALIDATE window. (Hold down **CTRL+CLICK** or **SHIFT+CLICK** to select more than one Package.) The selected Package displays in the PACKAGE NO. field. If you selected multiple Packages, they all display in the PACKAGE NO. field separated by semi-colons.
 - Click **SEARCH** to search for Packages in a separate query window and follow the procedure in *“Searching for Packages to Attach”* on page 52.
7. Click the RELATIONSHIP drop down list to open it. Select the type of relationship you want to assign between the Packages by selecting the appropriate radio button. See *Table D-5 on page 19* for a description of the various relationships that can be assigned.
8. Click **OK**. You return to the **REFERENCES** tab in the PACKAGE window. The new attached Package displays as a Reference.
9. Click **OK** to save the attached Package as a Reference and close the PACKAGE window.
10. Click **SAVE** to save the attached Package as a Reference in the Package without closing the PACKAGE window.

Searching for Packages to Attach

This procedure lets you use additional criteria and expand the search capability for Packages to attach to a Package.

1. From the NEW REFERENCE - PACKAGE window, click **SEARCH**. The PACKAGE SELECTION window opens.

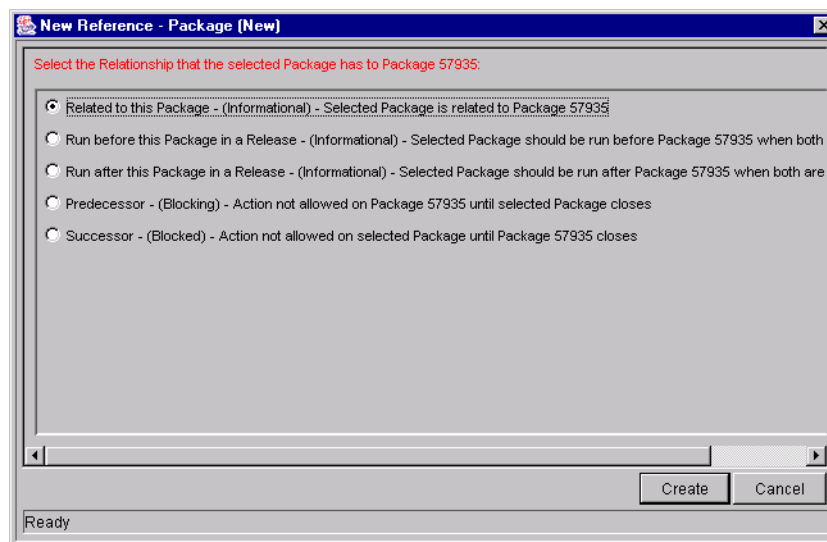
2. Query for the Package(s) you want to use by entering search criteria in the appropriate fields.
3. Click **LIST**. The Packages that match your search criteria display in the QUERY RESULTS section of the window.
4. Select the Package(s) in the QUERY RESULTS section that you want to attach to the Package.
5. Select the type of relationship you want to assign between the Package and its attachment from the SELECT RELATIONSHIP FOR NEW REFERENCES drop down list. See [Table D-5 on page 19](#) for a description of the various relationships that can be assigned.
6. Click **OK** to attach the Package(s) to the Package and close the current window. You return to the **REFERENCES** tab in the PACKAGE window.

7. After you return to the PACKAGE window, the new attached Package displays as a Reference.
8. Click **OK** to save the new Reference and close the PACKAGE window.
9. Click **SAVE** to save the new Reference in the Package without closing the PACKAGE window.

Creating a New Package

A new Package can be created from a Package's **REFERENCES** tab.

1. Select **PACKAGE (NEW)** from the REFERENCE TYPE drop down list and click **ADD**. The NEW REFERENCE - PACKAGE (NEW) window opens.



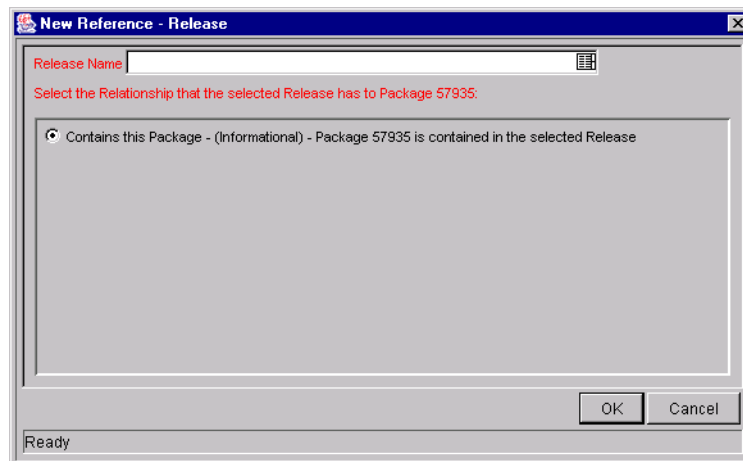
2. Select a relationship from the available radio buttons.
3. Click **CREATE** to create the new Package. A new Package window opens. The new Package's DESCRIPTION field is defaulted to the original Package's description. Specify a Workflow and add Package Lines as you would for any other Package submittal.
4. Click **SUBMIT**. The PACKAGE window closes and returns you to the **REFERENCES** tab in the original PACKAGE window. The newly created Package displays as a Reference.

5. Click **OK** to save the Package as a Reference and close the PACKAGE window.
6. Click **SAVE** to save the Package as a Reference in the Package without closing the PACKAGE window.

Attaching Releases

To attach Releases to a Package:

1. Open the PACKAGE window.
2. Click the **REFERENCES** tab
3. Click the NEW REFERENCE drop down list.
4. Select **RELEASE** from the drop down list.
5. Click **ADD**. The NEW REFERENCE - RELEASE window opens.



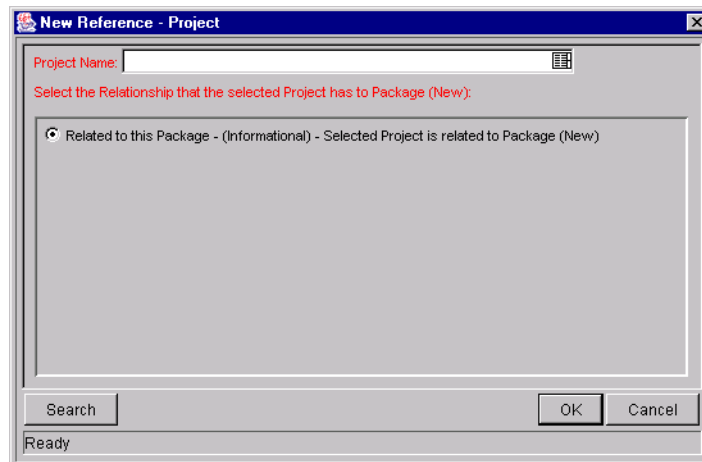
6. Enter the Release Name in the RELEASE NAME field or click the RELEASE NAME auto-complete list to locate and select the Release in a VALIDATE window. (Hold down **CTRL+CLICK** or **SHIFT+CLICK** to select more than one Release.) The selected Release displays in the RELEASE NAME field. If you selected multiple Releases, they all display in the RELEASE NAME field separated by semi-colons.
7. Click **OK**. You return to the **REFERENCES** tab in the PACKAGE window. The new attached Release displays as a Reference.

8. Click **OK** to save the attached Release as a Reference and close the PACKAGE window.
9. Click **SAVE** to save the attached Release as a Reference in the Package without closing the PACKAGE window.

Attaching Projects

To attach Projects to a Package:

1. Open the PACKAGE window.
2. Click the **REFERENCES** tab
3. Click the **NEW REFERENCE** drop down list.
4. Select **PROJECT** from the drop down list.
5. Click **ADD**. The **NEW REFERENCE - PROJECT** window opens.



6. To select a Project for an attachment, use one of the following methods:
 - Enter the Project Name in the **PROJECT NAME** field or click the **PROJECT NAME** auto-complete list to locate and select the Project in a **VALIDATE** window. (Hold down **CTRL+CLICK** or **SHIFT+CLICK** to select more than one Project.) The selected Project displays in the **PROJECT NAME** field. If you selected multiple Projects, they all display in the **PROJECT NAME** field separated by semi-colons.
 - Click **SEARCH** to search for Projects in a separate query window and follow the procedure in [“Searching for Projects to Attach”](#) on page 56.

7. Click **OK**. You return to the **REFERENCES** tab in the **PACKAGE** window. The new attached Project displays as a Reference.
8. Click **OK** to save the attached Project as a Reference and close the **PACKAGE** window.
9. Click **SAVE** to save the attached Project as a Reference in the Package without closing the **PACKAGE** window.

Searching for Projects to Attach

This procedure lets you use additional criteria and expand the search capability for Projects to attach to a Package.

1. From the **NEW REFERENCE - PROJECT** window, click **SEARCH**. The **PROJECT SELECTION** window opens.

Project Name	State	Sched Start	Sched Finish	Project Manager	Department	Project
--------------	-------	-------------	--------------	-----------------	------------	---------

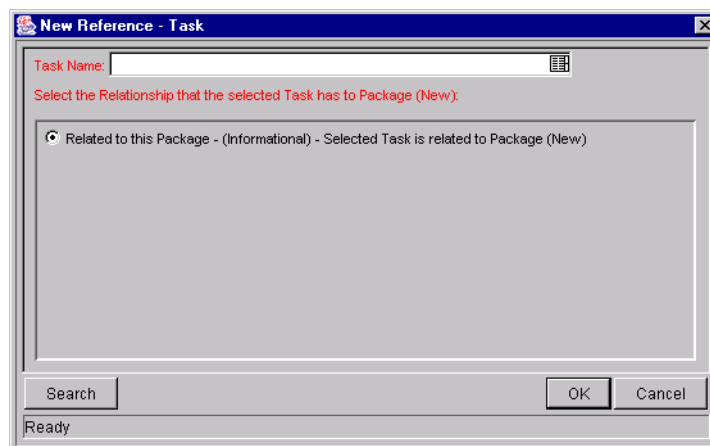
2. Query for the Project(s) you want to use by entering search criteria in the appropriate fields.
3. Click **LIST**. The Projects that match your search criteria display in the **QUERY RESULTS** section of the window.
4. Select the Project(s) in the **QUERY RESULTS** section that you want to attach to the Project.

5. Select the type of relationship you want to assign between the Package and its attachment from the **SELECT RELATIONSHIP FOR NEW REFERENCES** drop down list. See [Table D-5 on page 19](#) for a description of the various relationships that can be assigned.
6. Click **OK** to attach the Project(s) to the Package and close the current window. You return to the **REFERENCES** tab in the **PACKAGE** window.
7. After you return to the **PACKAGE** window, the new attached Project displays as a Reference.
8. Click **OK** to save the new Reference and close the **PACKAGE** window.
9. Click **SAVE** to save the new Reference in the Package without closing the **PACKAGE** window.

Attaching Tasks

To attach Tasks to a Package:

1. Open the **PACKAGE** window.
2. Click the **REFERENCES** tab
3. Click the **NEW REFERENCE** drop down list.
4. Select **TASK** from the drop down list.
5. Click **ADD**. The **NEW REFERENCE - TASK** window opens.



6. To select a Task for an attachment, use one of the following methods:

- Enter the **TASK NAME** or click the **TASK NAME** auto-complete list to locate and select the Task in a **VALIDATE** window. (Hold down **CTRL+CLICK** or **SHIFT+CLICK** to select more than one Task.) The selected Task displays in the **TASK NAME** field. If you selected multiple Tasks, they all display in the **TASK NAME** field separated by semi-colons.
 - Click **SEARCH** to search for Tasks in a separate query window and follow the procedure in *Searching for Tasks to Attach*.
7. Click **OK**. You return to the **REFERENCES** tab in the **PACKAGE** window. The new attached Task displays as a Reference.
 8. Click **OK** to save the attached Task as a Reference and close the **PACKAGE** window.
 9. Click **SAVE** to save the attached Task as a Reference in the Package without closing the **PACKAGE** window.

Searching for Tasks to Attach

This procedure lets you use additional criteria and expand the search capability for Tasks to attach to a Package.

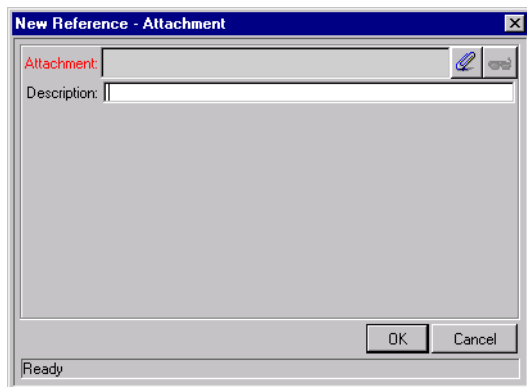
1. From the **NEW REFERENCE - EXISTING TASK** window, click **SEARCH**. A new query window opens.

2. Query for the Task(s) you want to use by entering search criteria in the appropriate fields.
3. Click **LIST**. The Task that match your search criteria display in the QUERY RESULTS section of the window.
4. Select the Task(s) in the QUERY RESULTS section that you want to attach to the Package.
5. Click **OK** to attach the Task(s) to the Package and close the current window. You return to the **REFERENCES** tab in the PACKAGE window.
6. After you return to the PACKAGE window, the new attached Task displays as a Reference.
7. Click **OK** to save the new Reference and close the PACKAGE window.
8. Click **SAVE** to save the new Reference in the Package without closing the PACKAGE window.

Adding an Attachment

To add an attachment as a Reference:

1. Select **ATTACHMENT** from the NEW REFERENCE drop down list and click **ADD**. The NEW REFERENCE - ATTACHMENT window opens.

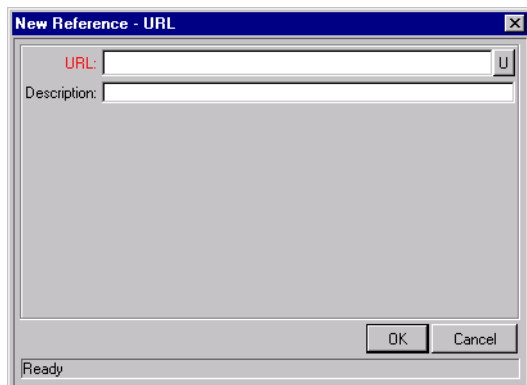


2. Select the desired file from your local machine and enter a description if desired.
3. Click **ADD** to add the selected Attachment as a Reference and continue to add more. Click **OK** to add the selected Attachment as a Reference and close the REFERENCES: NEW window. Click **CANCEL** to exit the REFERENCES: NEW window without making changes.

Adding a URL

To add a URL as a Reference:

1. Select **URL** from the NEW REFERENCE drop down list and click **ADD**. The NEW REFERENCE - URL window opens.



2. Type the URL into the URL field and enter a description if desired.

- Click **OK** to add the specified URL as a Reference and close the **NEW REFERENCE - URL** window. Click **CANCEL** to exit the window without making changes.

Valid Package References

Table 4-1. Valid References in the Reference Tab

Type	Description
ATTACHMENT	You can attach a file from your local machine to the current Package. The attached file is copied to the server and can then be accessed by other Kintana Deliver users. This feature is particularly helpful when you need to reference a document that is not already Web accessible.
PACKAGE (EXISTING)	You can reference other Packages directly from the Reference tab. Also, if configured as part of the current Workflow, you can spawn a Package from another Package. When this happens, a reference to that Package is automatically generated, establishing a two-way link between the primary and secondary Package.
PACKAGE (NEW)	New Packages can also be created from a Package in the REFERENCES tab.
PROJECT	You can attach the current Package to a Kintana Drive Project.
RELEASE	You can associate a Package with a Release by referencing the Release number.
REQUEST (EXISTING)	You can reference Requests directly from the REFERENCE tab. Also, if configured as part of the Kintana Create Workflow, you can spawn a Package from a Request. When this happens, a reference to that Request is automatically generated, establishing a two-way link between the Request and Package.
REQUEST (NEW)	New Requests can also be created from a Package in the REFERENCES tab.
TASK	You can attach the current Package to a Kintana Drive Task.
URL	<p>You can reference URLs from a Package. Once attached, click on the Web address to open the document in your Web browser. The document must be in a MIME format recognized by your Web browser (Word, Excel, etc.)</p> <p>Use URLs to include more detailed information than what is included in the Package notes, such as a screenshot for a Bug or a report.</p>

Reference Dependency Relationships

The relationships that can exist between a Package and a Reference are listed below in table [Table 4-2](#).

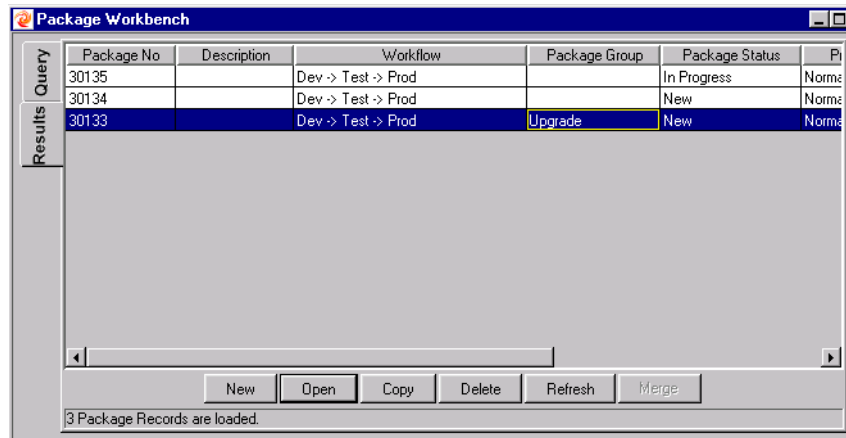
Table 4-2. Reference Relationships

Entity	Relationships	Description
Attachment	Standard Attachment interaction	The attachment is related to this Package.
Packages	Related to this Package	Selected Package is related to this Package
	Run Before this Package in a Release	Selected Package should be run before this Package when both are in a Release.
	Run After This Package in a Release	Selected Package should be run after this Package when both are in a Release.
	Predecessor	Action not allowed on the this Package until the selected Package closes.
	Successor	Action not allowed on the selected Package until this Package closes.
Projects	Related to This Package	Selected Project is related to this Package.
Releases	Contains This Package	The Package is contained in the selected Release.
Requests	Parent of This Package	Selected Request is the parent of this Package.
	Related to This Package	Selected Request is related to this Package.
	Predecessor	Action not allowed on the this Package until the selected Request closes.
	Successor	Action not allowed on the selected Request until this Package closes.
Tasks	Related to This Package	Selected Task is related to this Package.
URL	Standard URL interaction	The URL is related (informational reference only) to this Package.

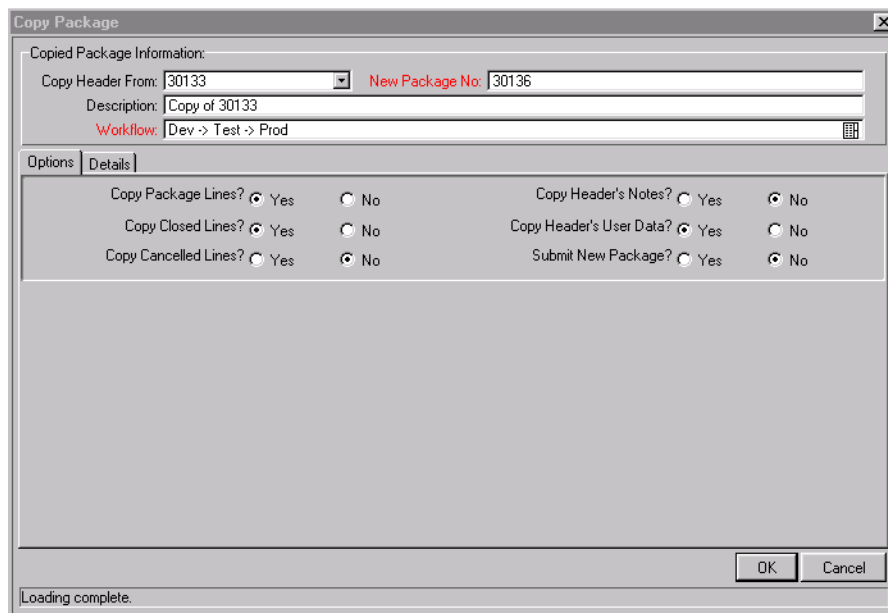
Copying an Existing Package

To copy a Package:

1. Locate and select the Package to be copied in the **RESULTS** tab of the **PACKAGES WORKBENCH**.



2. Click **COPY**. The **COPY PACKAGE** window opens.



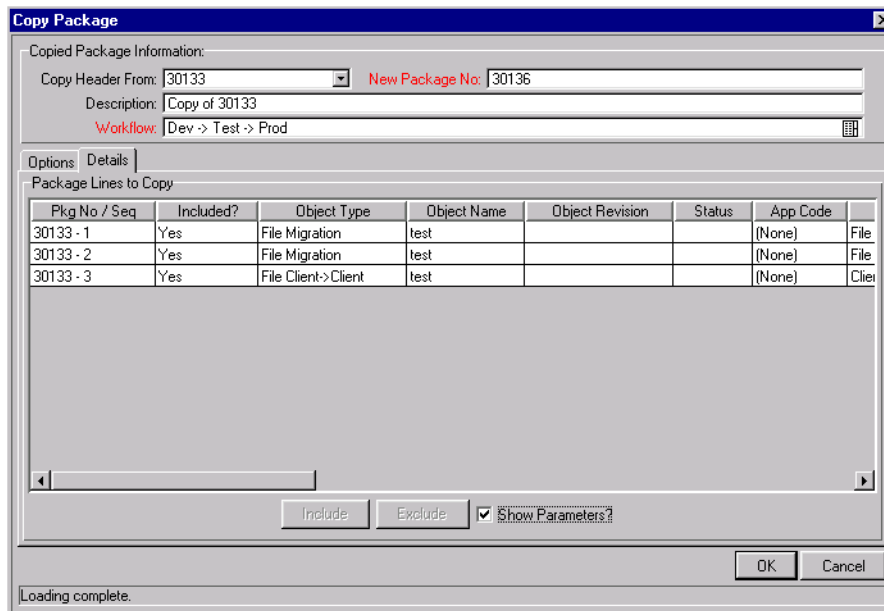
3. Enter the new **DESCRIPTION** and select a **Workflow**.
4. Select **YES** or **NO** for the various items on the **OPTIONS** tab to specify which Package-specific information should be copied to the new Package.



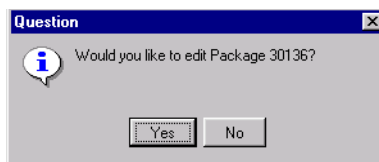
Note

You must also decide whether or not to automatically submit the Package after a successful copy. To automatically submit the Package, select **YES** for the **SUBMIT NEW PACKAGE** radio button.

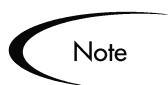
- Click the **DETAILS** tab to specify which Package Lines are carried over.



- To exclude a Package Line, select the line and click **EXCLUDE**. The newly excluded line appears in italics.
- Check the **SHOW PARAMETERS** check box to see more information about the Package Lines.
- Click **OK**. A **QUESTION** dialog opens.



- Select **YES** to edit or **NO** to return to the **PACKAGE WORKBENCH**.



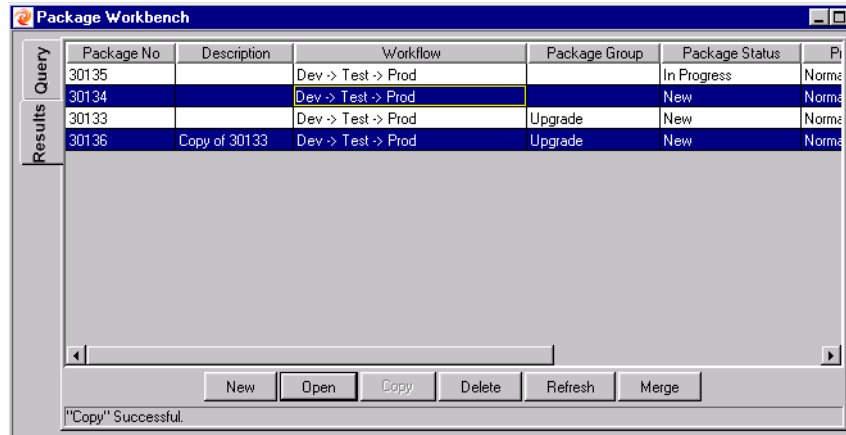
If you did not select **YES** for the **SUBMIT NEW PACKAGE** radio button, under the **OPTIONS** tab, then your Package is *not* submitted. To submit the Package, you must open the copied Package and click **SUBMIT**.

Merging Packages

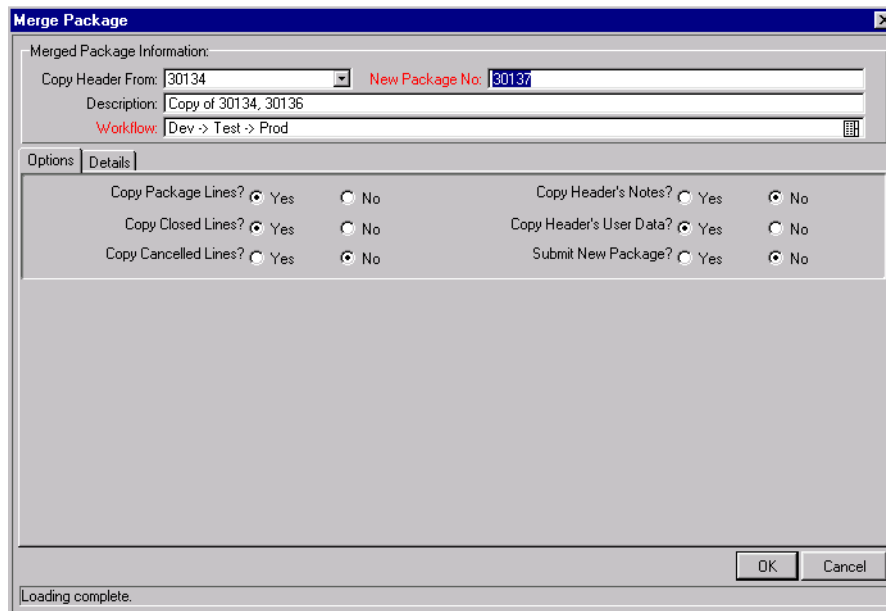
You can generate a new Package by merging two or more existing Packages. This is advantageous when you would like to generate a single Package consisting of certain Package Lines contained in separate Packages.

To merge two Packages:

1. Locate and select the Packages to be copied in the **RESULTS** tab of the **PACKAGES WORKBENCH**. Hold down the Ctrl key to select nonadjacent rows.



2. Click **MERGE**. The **MERGE PACKAGE** window opens.



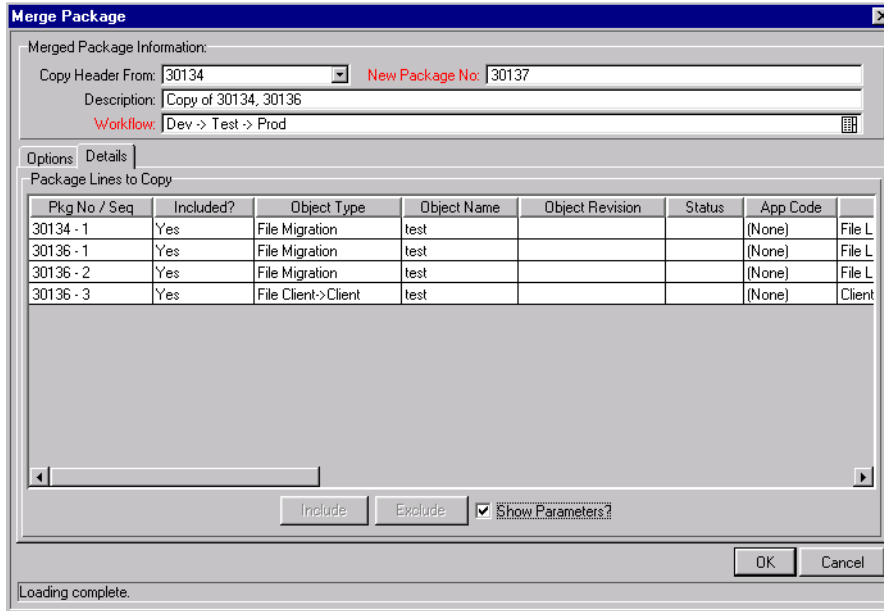
3. Enter the new **DESCRIPTION** and select a **Workflow**.
4. Select **YES** or **NO** for the various items on the **OPTIONS** tab to specify which Package specific information should be copied to the new combined Package.



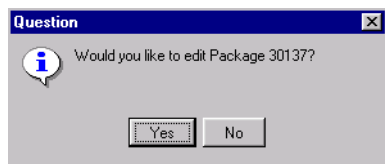
Note

To automatically submit the Package after a successful copy, select **YES** for the **SUBMIT NEW PACKAGE** radio button.

5. Click the **DETAILS** tab to specify which Package Lines are carried over.



6. To exclude a Package Line, select the line and click **EXCLUDE**. The newly excluded line appears in italics.
7. Check the **SHOW PARAMETERS** check box to see more information about the Package Lines.
8. Click **OK**. A **QUESTION** dialog opens.



9. Select **YES** to edit or **NO** to return to the **PACKAGE WORKBENCH**.



Note

If you did not select **YES** for the **SUBMIT NEW PACKAGE** radio button, under the **OPTIONS** tab, then your Package is *not* submitted. To submit the Package, you must open the copied Package and click **SUBMIT**.

Generating a New Package Group

It is often advantageous to link the new Package to a specific Package Group for tracking and reporting purposes. To add a new Package Group from the PACKAGE window:

1. Select **NEW PACKAGE GROUP** from the **PACKAGE** menu. The **VALIDATION: KNTA - PACKAGE AND REQUEST GROUPS** window opens, listing groupings for Packages and Requests.

Validation : KNTA - Package and Request Groups

Name: KNTA - Package and Request Groups

Description: groupings for packages and requests

Enabled: Use in Workflow?

Component Type: Drop Down List

Validated By: List

Validation Values:

Seq	Code	Meaning	Description	Enabled	Default
1	CUSTOMIZATI...	Customization	Customization	Y	N
2	SETUP	Setup	Setup	Y	N
3	UPGRADE	Upgrade	Upgrade	Y	N

New Edit Delete Copy From ↑ ↓

References OK Save Cancel

Ready (Read-Only, Seed Data)

2. Click **NEW**. The **ADD VALIDATION VALUE** window opens.

Add Validation Value

Value Information | UserData

Code:

Meaning:

Desc:

Enable? Default?

OK Add Cancel

Ready

3. Enter all of the required information in both the **VALUE INFORMATION** and **USER DATA** tabs.

4. Click **OK** to accept the new Package Group and close the window, or click **ADD** to accept the new Package Group and enter another new Package Group.
5. Click **OK** to save the changes.

Editing a Package Group

You can also edit existing Package Groups from within the Package Workbench. To edit an existing Project:

1. Select **NEW PACKAGE GROUP** from the **PACKAGE** menu. The **VALIDATION: KNTA PACKAGE AND REQUEST GROUPS** window opens, listing groupings for Package and Requests.

Seq	Code	Meaning	Description	Enabled	Default
1	CUSTOMIZATI...	Customization	Customization	Y	N
2	SETUP	Setup	Setup	Y	N
3	UPGRADE	Upgrade	Upgrade	Y	N

2. Select the Package Group that you would like to edit.
3. Click **EDIT**. The **EDIT VALIDATION VALUE** window opens.

4. Make any desired changes and click **OK** to save the changes.

Note

Only users with appropriate Access Grants and security privileges can alter the KNTA PACKAGE AND REQUEST GROUPS VALIDATION list. You should consult your Administrator before adding or editing any Package Groups. Package Groups are typically generated to adhere to specific business application standards.

Selecting a Workflow for a Package

Each Package is processed through a Workflow that was defined by your process configuration team. Kintana Deliver users are required to select a Workflow for each Package that they initiate. It is essential that Kintana Deliver users route their Packages through Workflows that properly model the appropriate business process.

The Kintana Product Suite allows for extremely flexible Workflows, allowing you to map and configure almost any business process. Each Kintana Product Suite implementation will have uniquely defined Workflows.

Tip

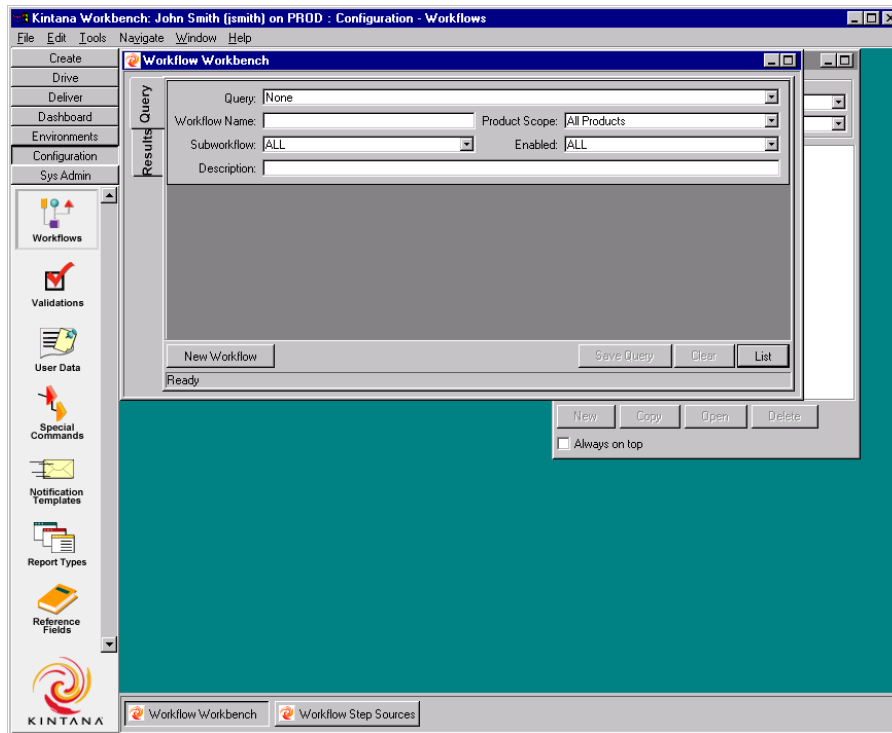
Check with your Administrator to verify that you are using the Workflow that accurately represents the business process that you would like to follow.

Although companies typically restrict Workflow editing permissions to certain users, all Kintana Deliver power users have permission to view the Workflow windows. Kintana Deliver users are encouraged to familiarize themselves with the Workflows that they are using to process their Packages. Viewing the

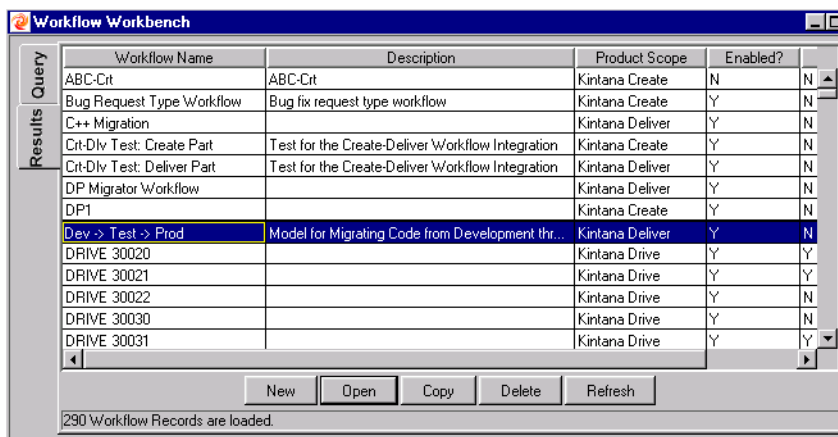
Workflow's graphical layout can help users decide whether they are using the appropriate Workflow for the current Package.

To view the graphical layout of a Kintana Deliver Workflow:

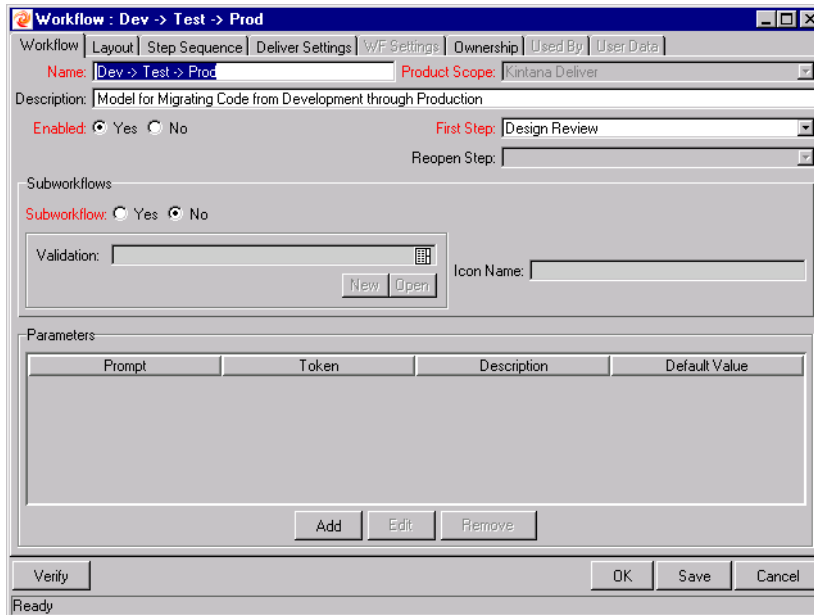
1. Click **CONFIGURATION** in the shortcut bar and click the **WORKFLOWS** icon. The **WORKFLOW WORKBENCH** opens.



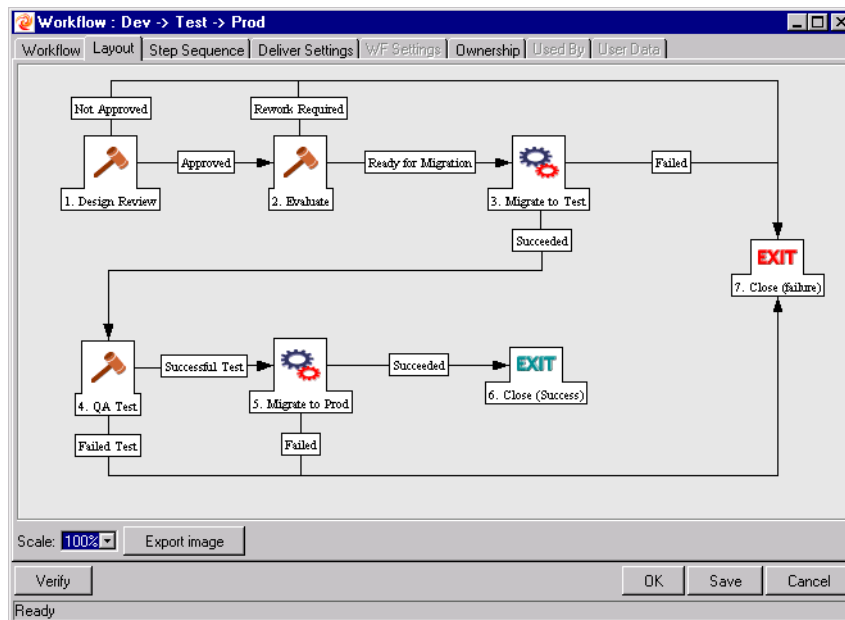
2. Click **LIST** to display all of the Workflows in the system. You can restrict the search by entering one or more of the query parameters.



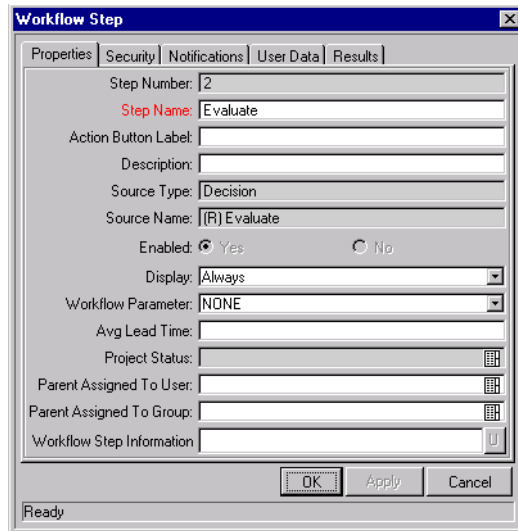
- Select one or more of the listed Workflows and click **OPEN**. The WORKFLOW window opens.



- Click the **LAYOUT** tab to view the Workflow's graphical representation.

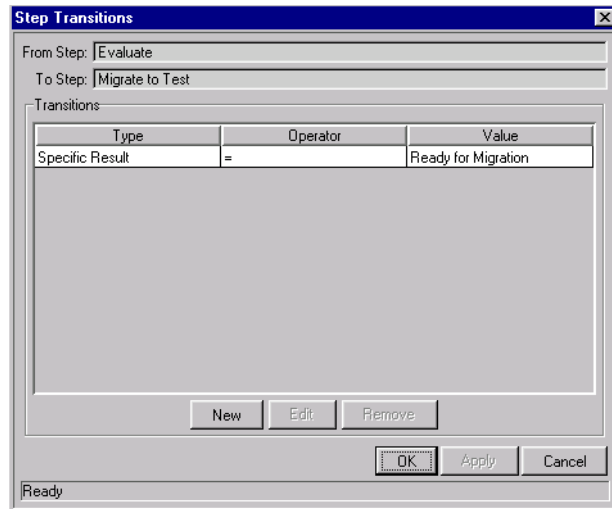


- Double-click on any numbered step to view the WORKFLOW STEP window.



Click on any of the tabs to view the following information:

- **PROPERTIES:** This tab contains general information about the Workflow Step.
 - **SECURITY:** This tab is used to define the Security Groups that are allowed to act on a particular step. All of the enabled Security Groups will appear in either the AVAILABLE SECURITY GROUPS field or the LINKED SECURITY GROUPS field. Each user who belongs to a LINKED SECURITY GROUP is able to perform the actions defined for that particular Workflow Step.
 - **NOTIFICATIONS:** This tab is used to attach email notifications to the specific Workflow Step. Email messages can be sent whenever an event occurs at a Workflow Step. An event can be when the step becomes eligible or when the step completes with a specific result.
 - **USER DATA:** This tab on the Workflow Step displays any custom fields for each Workflow Step.
 - **RESULTS:** This tab that lists all the valid results the step can have.
6. Double-click on any transition arrow to view the Step Transitions window. This window details the conditions that must be met in order to continue to the next Workflow Step.



Note

Kintana Workflows can consist of multiple Subworkflows which are represented in the **LAYOUT** tab by a single Subworkflow icon. Users can view each of these Subworkflows in the same manner as described above or by opening the desired Workflow in the **WORKFLOW STEP SOURCE** window.

For more information about a particular Workflow or general information on Kintana Deliver Workflow processing, consult your Administrator or refer to the Workflow chapter in *"Configuring a Deployment System in Kintana"*.

Submitting a Package

Once a Workflow is selected and Package Lines have been added, the Package is eligible for submission. The following figure illustrates a Package pending submission. Notice that the **SUBMIT** button remains enabled for pending submission. Submit the Package by clicking **SUBMIT**. The Package begins moving through its assigned Workflow to completion.

The screenshot shows a software window titled "Package: 30241". The window is divided into several sections:

- Package Information:** This section contains various fields for package details:
 - Package No.: 30241
 - Package Group: [empty]
 - Description: Migrating Files.
 - Workflow: Dev -> Test -> Prod
 - Assigned User: [empty]
 - Assigned Group: [empty]
 - Priority: Normal
 - Package Type: Customization
 - Created By: jsmith
 - Created On: April 11, 2002
 - Package Status: New
 - Parent: [empty]
 - Priority Seq: 50
- Package Lines:** This section contains a table with 5 columns: Seq, Object Type, App Code, 1, 2, 3, 4, 5. The table lists five file migration entries.
- Buttons:** At the bottom of the window, there are buttons for "New Line", "Edit Line", "Copy Line", "Remove Line", "Submit", "OK", "Save", and "Cancel".

Seq	Object Type	App Code	1	2	3	4	5
1	File Migration	(None)	File Location: Client	Sub-Path: D:/temp	File Name: file.zip	File Type: Binary	
2	File Migration (Web)	(None)	File Location: Client	Sub-Path: D:/temp	File Name: banner.jpg	File Type: ASCII	
3	File Migration (Web)	(None)	File Location: Client	Sub-Path: D:/temp	File Name: header.htm	File Type: ASCII	
4	File Migration (Web)	(None)	File Location: Client	Sub-Path: D:/temp	File Name: index.htm	File Type: ASCII	
5	File Migration (Web)	(None)	File Location: Client	Sub-Path: D:/temp	File Name: toc.js	File Type: ASCII	

Chapter 5 Processing Packages

During the initial entry of a Package, users specify the Kintana Deliver Workflow through which the Package is processed. This Workflow is the business and migration process that the Package follows. Workflows are initially determined during system configuration and are modified as needed.



Tip

If you have questions concerning the configuration and use of a specific Workflow in your Kintana Deliver instance, consult your business configuration expert.

The following sections are provided for the Kintana Deliver users who process Packages through the Workflow:

- [“Viewing Package Permissions”](#) on page 75
- [“Locating In Progress Packages”](#) on page 77
- [“Checking a Package Status”](#) on page 82
- [“Viewing Information on Packages and Package Lines”](#) on page 85
- [“Acting on an Eligible Step - Overview”](#) on page 99
- [“Updating Packages in the Kintana Deliver HTML Interface”](#) on page 101
- [“Processing Packages in the Kintana Workbench”](#) on page 109
- [“Configuring Workflow Display”](#) on page 119

Viewing Package Permissions

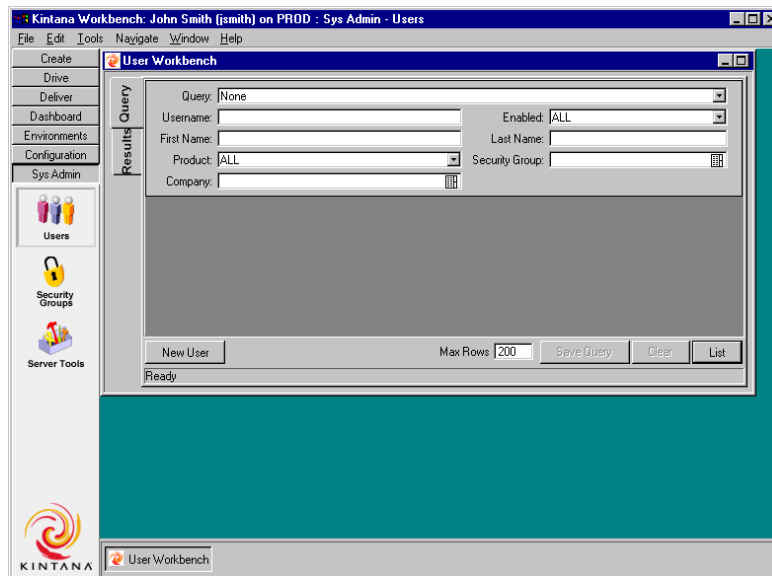
To increase general accountability and control over the Package process, Kintana Deliver has implemented Package security in two key ways:

- **Security Group Security:** Users must be included in specific Security Groups (that have the correct Access Grants) for them to have edit-access to different levels of Package processing.
- **Workflow Step Security:** Each Workflow Step explicitly states which Security Groups can act on that step.

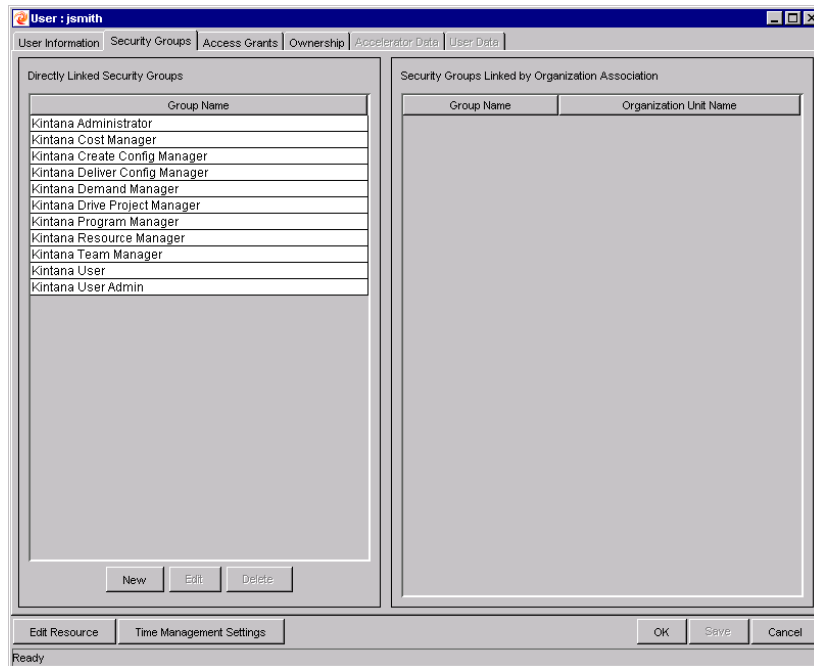
Although the process of setting up Security Group and Workflow Step securities remains an issue for your business process configuration experts, all Kintana Deliver Power Users have full read-access to view their individual security privileges.

To determine to which Security Group(s) you belong:

1. In the Kintana Workbench, click the **SYS ADMIN** screen group and click the **USERS** icon. The **USERS WORKBENCH** opens.



2. Enter your USERNAME and click **LIST**. The **RESULTS** tab is displayed.
3. Your USERNAME is listed under the **RESULTS** tab. Select your name and click **OPEN**. The **USER** window opens.
4. Click the **SECURITY GROUPS** tab.



The Security Groups to which you belong are listed in **SECURITY GROUPS** tab. These Security Groups dictate your level of Kintana Deliver edit-access. Security Groups are highly configurable and can vary greatly between Kintana Product Suite implementations. See "[Kintana Security Model](#)" for details.

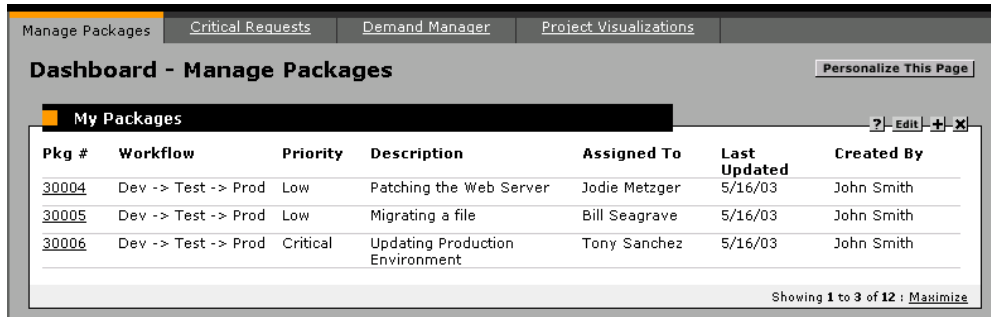
Locating In Progress Packages

Packages are sometimes routed through a lengthy business process involving testing, various approvals and rework. Kintana users may wish to check on all of their open Packages to locate any bottlenecks and assist in Package processing. Users can find open Packages using four different methods:

- [Using the My Packages Portlet](#)
- [Querying for In Progress Packages](#)
- [Reporting on Open Packages](#)
- [Using Smart URLs to Locate Open Packages](#)

Using the My Packages Portlet

The quickest way to locate relevant Packages is through your Kintana Home page. The MY PACKAGES portlet displays all Packages you have created.



Manage Packages | Critical Requests | Demand Manager | Project Visualizations

Dashboard - Manage Packages Personalize This Page

My Packages ? Edit + X

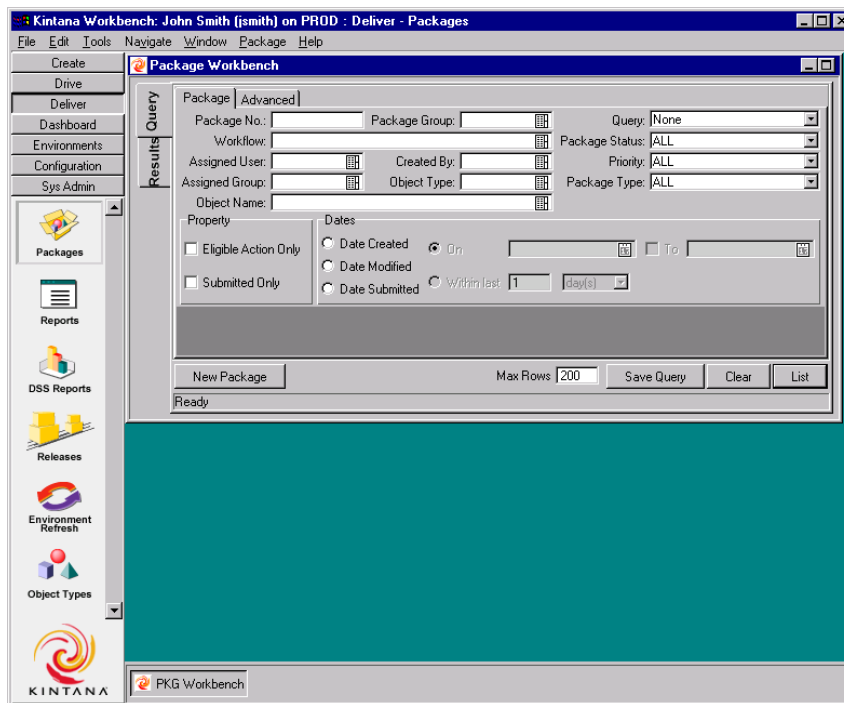
Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
30004	Dev -> Test -> Prod	Low	Patching the Web Server	Jodie Metzger	5/16/03	John Smith
30005	Dev -> Test -> Prod	Low	Migrating a file	Bill Seagrave	5/16/03	John Smith
30006	Dev -> Test -> Prod	Critical	Updating Production Environment	Tony Sanchez	5/16/03	John Smith

Showing 1 to 3 of 12 : [Maximize](#)

Querying for In Progress Packages

To query for IN PROGRESS Packages:

1. Click the **DELIVER** screen group and click the **PACKAGES** icon. The **PACKAGE WORKBENCH** opens.



2. Select **IN PROGRESS** from the **PACKAGE STATUS** drop down list.
3. If you would like to limit the search to Packages that you generated, select your username from the **CREATED BY** drop down list.

- Click **LIST**. The **RESULTS** tab is displayed.

Packages are listed in the **RESULTS** tab.



Tip

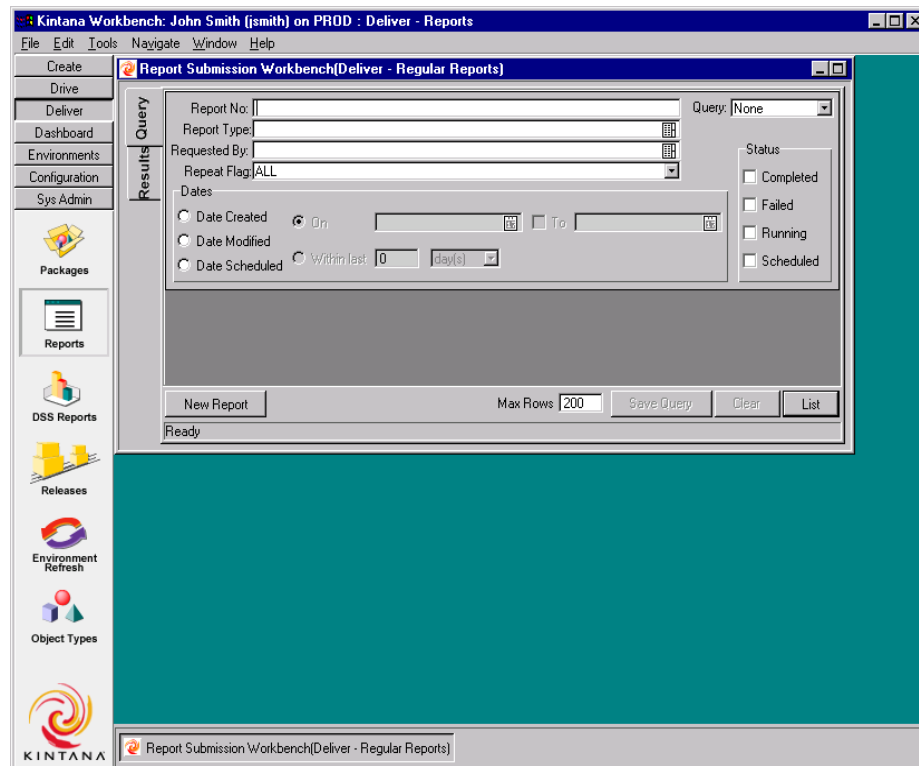
The **QUERY** tab can also be helpful in finding all **OPEN** (i.e. NOT CLOSED) Packages. The **ADVANCED** tab allows you to set up entire lists of inclusions and exclusions in your database search. For more information on using the **ADVANCED** query, refer to [“Query Tab”](#) on page 6.

Reporting on Open Packages

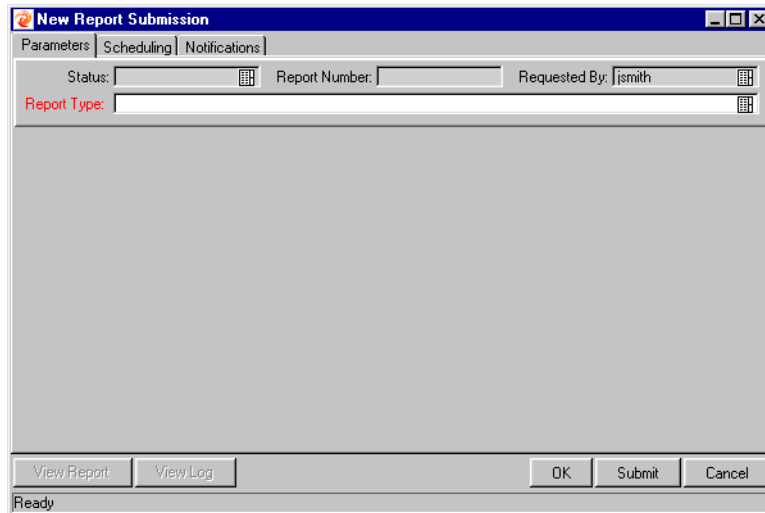
Kintana comes with a pre-defined set of Reports that generate HTML text and can be accessed by a Web browser. Among these reports is the **PACKAGES PENDING REPORT**, which reports on open Packages with pending activity.

To Run the **PACKAGES PENDING REPORT**:

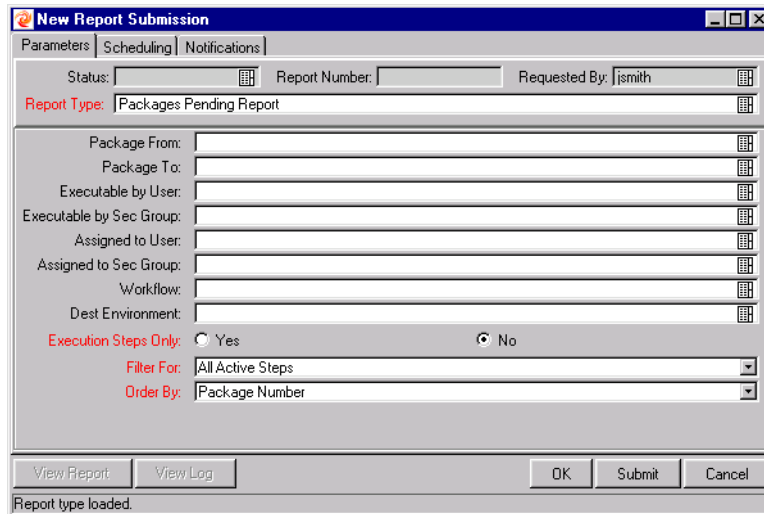
- Click **DELIVER** in the shortcut bar and click the **REPORTS** icon. The **REPORT SUBMISSION WORKBENCH** opens.



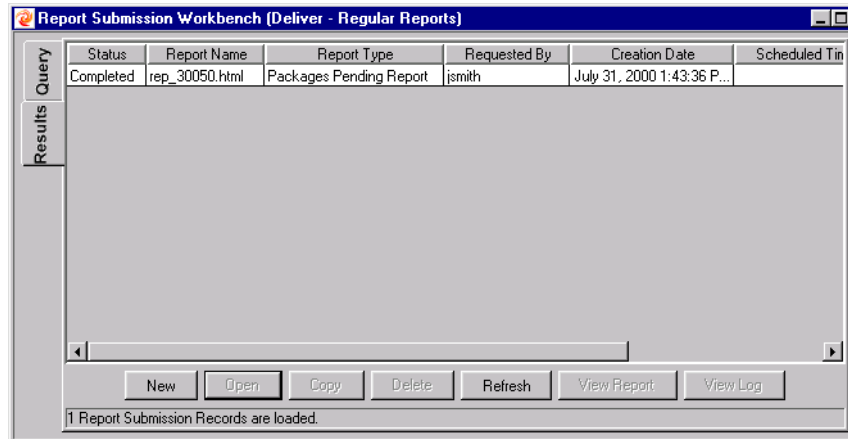
2. Click **NEW REPORT**. The NEW REPORT SUBMISSION window opens.



3. Select **PACKAGES PENDING REPORT** from the REPORT TYPE auto-complete list. The window is dynamically updated.



4. Since you are looking for a Report on all open Packages, accept the default parameters and click **OK**. The report runs and returns you to the **RESULTS** tab.



5. Select the **COMPLETED** line and click **VIEW REPORT**. This displays the following page in a new browser window:

Report Parameters

Report Name: **Packages Pending Report**
 Run Date: September 21, 2000 10:27
 Package From: _____ Package To: _____
 Executable by User: _____ Executable by Sec Group: _____
 Assigned to User: _____ Assigned to Sec Group: _____
 Workflow: _____ Dest Environment: _____
 Execution Steps Only: N Filter For: All Active Steps
 Order By: Package Number

Package	Description	Priority	Seq	Object Type	Object Name	Step Seq	Step Name	Step Status	Assigned To	Schedule Date
30004	Copy of 30002	Normal	1	File Migration	1.txt	3	Migrate to Test	Eligible		
30011		Normal	1	File Migration	we	3	Close (Manual success)	Eligible		
30028		Normal	2	sharxis obj1		2	Approve (One User)	Eligible		
		Normal	3	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	4	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	5	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	6	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	7	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	8	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	9	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	10	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	11	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	12	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	13	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	14	sharxis obj1		1	Approve (One User)	Eligible		
		Normal	15	sharxis obj1		2	Approve (One User)	Eligible		
		Normal	16	Kintana Request Type Migrator	CLRI_ISSUE_TYPES	1	Approve (One User)	Eligible		

You now have a detailed list of all of the Open Packages. For more information on the Packages Pending Report parameters as well as other Reports available in Kintana Deliver, refer to *“Kintana Deliver Reports”* on page 121.

Using Smart URLs to Locate Open Packages

As a Package proceeds through its Workflow, email notifications can be sent to alert users of pending actions. The logic regarding when emails are sent and the content for each email is defined in the Workflow. Notifications can be sent when a step becomes ELIGIBLE, alerting specific users that they need to perform

an action or decision. They can also be sent after a step is completed to inform assigned users of the specific outcome.

Kintana Deliver notifications typically instruct the user to review a Package or act on a pending Workflow Step (an execution or a decision). Follow the instructions detailed in the notification for the appropriate course of action.

The notification may include a “Smart URL” which points to the specific Package in Kintana Deliver. Enter this URL into your Web browser to proceed to this destination. If you are currently logged onto Kintana, the referenced Package opens. If you are not currently running Kintana, the Kintana logon page opens. After you logon, the referenced Package opens. *Figure 5-1* shows a sample Notification.

```
http://machine.company.com/kintana/kintana.html

Notified Users:   jsmith@kintana.com

Status change for Request #: 30004.
Description: Sample Notification
Priority: High
Workflow: Migration Workflow
Workflow Step: 1. Approve (One User)
Old Status:      New Status: Eligible

=====
```

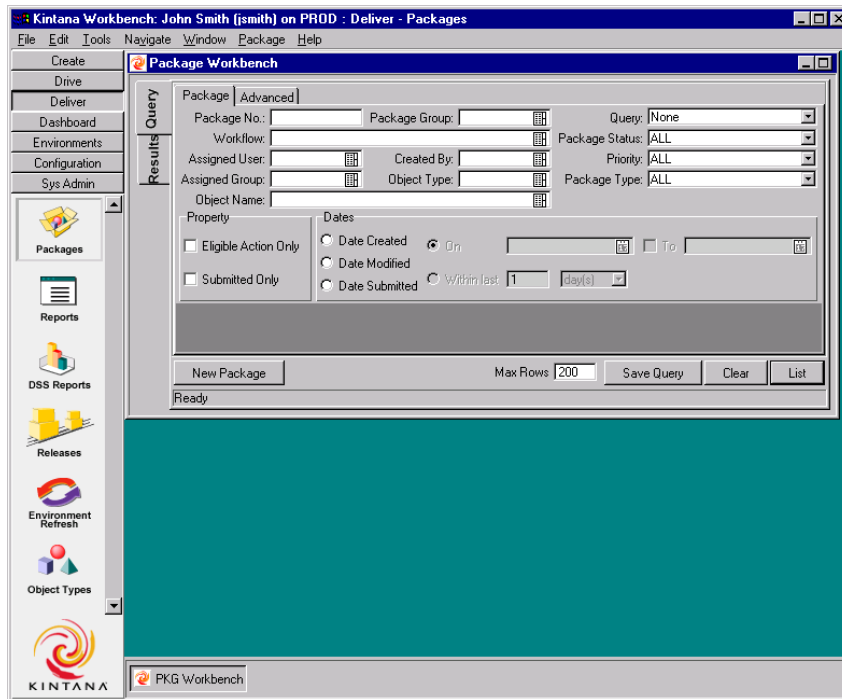
Figure 5-1 Sample Notification

Checking a Package Status

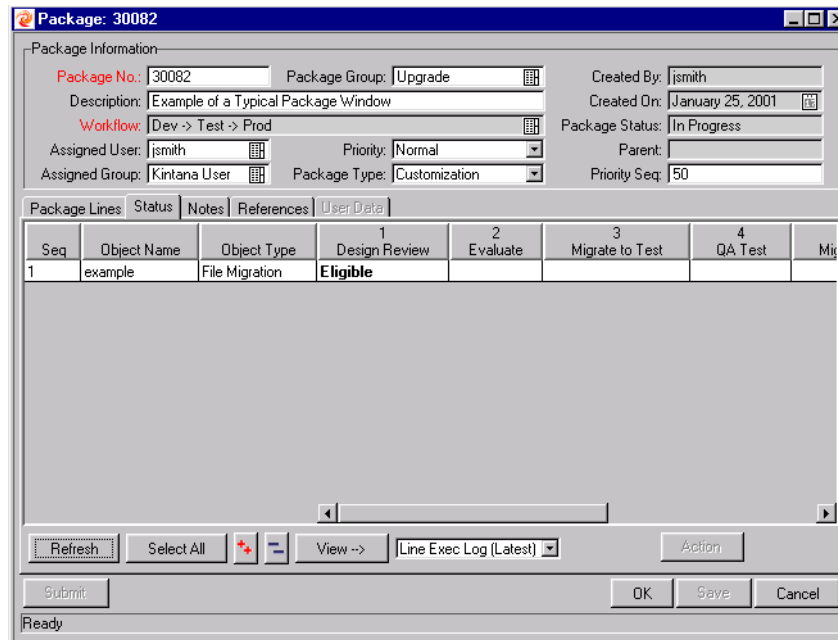
Each Package Line must follow a business process defined in its assigned Workflow. You can view all the Workflow and Subworkflow Steps for each Line in the **STATUS** tab in the PACKAGE window. This is the current view of the situation.

To view the STATUS of a particular Package:

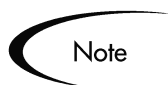
1. Click **DELIVER** in the shortcut bar and click the **PACKAGES** icon. The PACKAGE WORKBENCH opens.



2. Query for the desired Package using one or more of the query parameters. The results display in the **RESULTS** tab.
3. Select the Package and click **OPEN**. The **PACKAGE** window opens.
4. Click the **STATUS** tab.







You can now review the status of each Package Line. The result of each Workflow Step is recorded in the Package Line row, allowing you to quickly get an idea of which lines have closed successfully, failed, and so on.




Note

While all the Workflow Steps are listed, a Package Line might not go through each step before being resolved. For example, you might have a REWORK step that is only used when rework is required.

Viewing the Subworkflow Step Statuses

The Package Line can be expanded to show any Subworkflow Steps used in the Workflow definition. To view the Subworkflow steps, click the **expand**  symbol above the Subworkflow Step. You can also click on the **expand all**  symbol to expand all Subworkflows contained within the Status panel. To hide expanded Subworkflow steps, click the **collapse**  symbol above the Subworkflow step. To hide all Subworkflow steps, click the **collapse all**  symbol.

Clicking the **expand**  symbol horizontally expands the Package Line to display all of the steps within the Subworkflow. Subworkflow Steps have a different colored header and are numbered using additional decimal places corresponding to the level of the workflow.



Example

If Step 3 of a top-level Workflow is a Subworkflow, its steps are displayed as 3.1, 3.2, 3.3, etc. Similarly, if the second step in that Subworkflow is also a Subworkflow step, its steps are displayed as 3.2.1, 3.2.2, 3.2.3, etc.

Figure 5-2 shows expanded Subworkflow Steps on the Kintana Package STATUS tab.

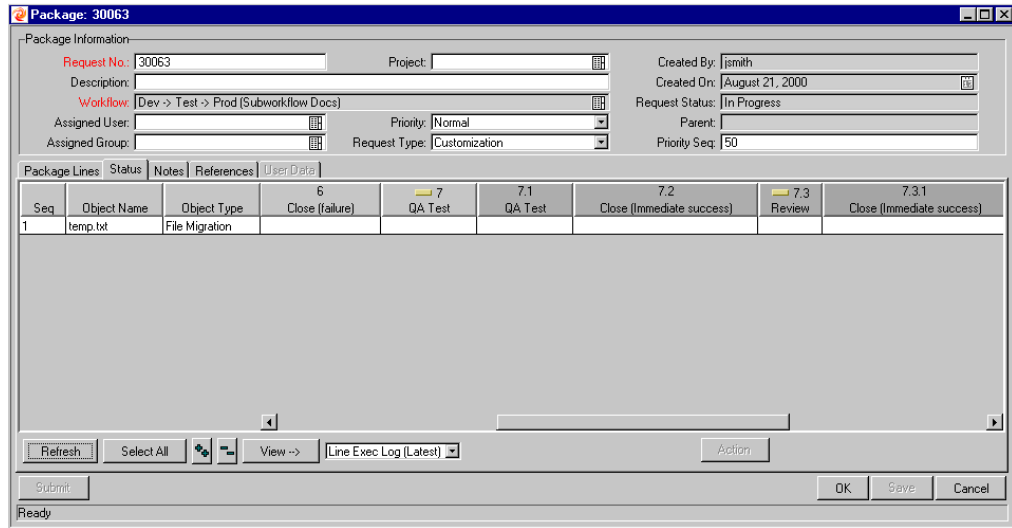


Figure 5-2 Expanded Subworkflow Steps in Status Tab

Viewing Information on Packages and Package Lines

From within a Package's **STATUS** tab in the Kintana Workbench, users can also view the following information concerning their Packages and Package Lines:

- [Viewing the Line Execution Log](#)
- [Viewing the Package Execution History](#)
- [Graphically Viewing a Package Line Status Within a Workflow](#)
- [Viewing Line Permissions](#)
- [Viewing the Line Transaction History](#)
- [Viewing the Decision Detail](#)
- [Viewing the Concurrent Package Log](#)
- [Viewing the Workflow Step Information URL](#)

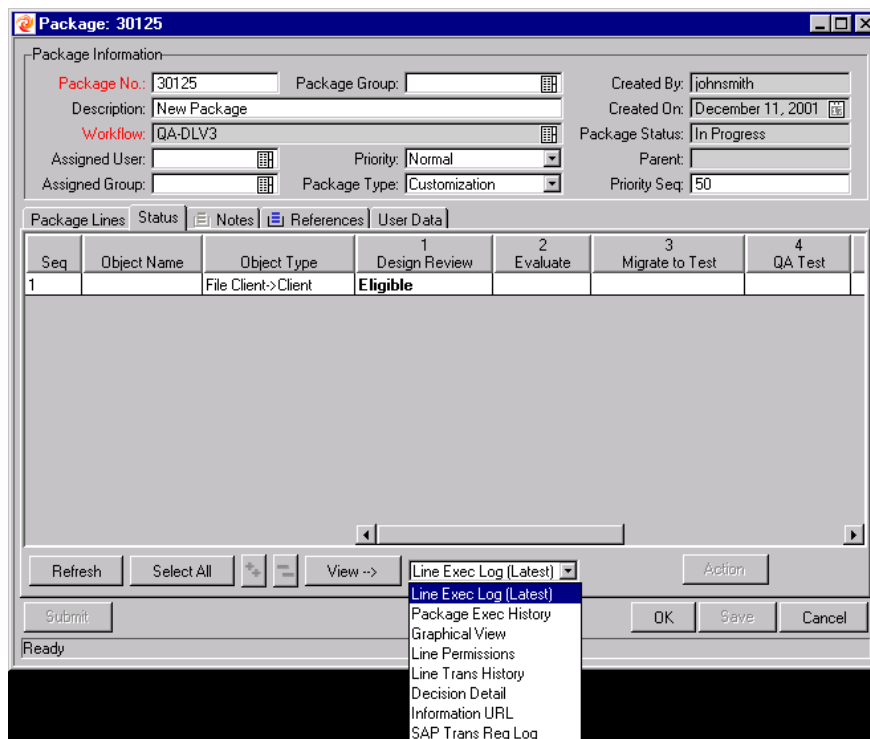
- *Updating References*

Viewing the Line Execution Log

It is possible to select a Package Line and get the details of the execution of that particular line by viewing the LINE EXECUTION LOG. The line viewed is a subset of the overall execution batch log.

To view the LINE EXECUTION LOG for a particular Package Line:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.

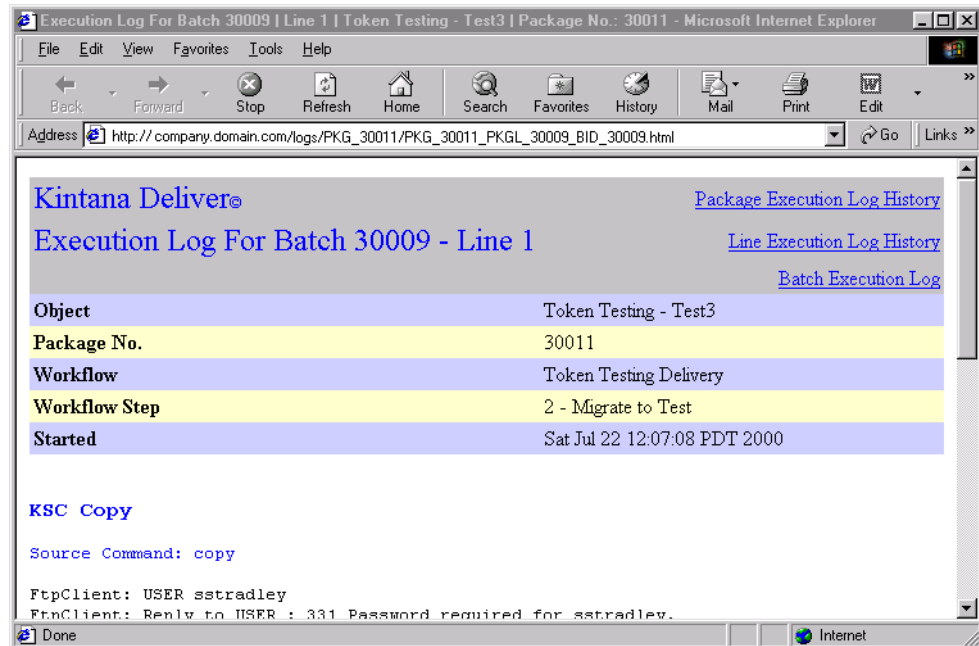


2. Select a Package Line.
3. Select **LINE EXEC LOG (LATEST)** from the drop down list next to the **VIEW-->** button near the bottom of the window.
4. Click **VIEW-->**. This opens a browser window displaying the LINE EXECUTION LOG.



Note

If the Package Line has been configured to migrate to multiple Environments using a Kintana Environment Group, the execution log returns an execution summary and link for each DESTINATION ENVIRONMENT. Click the link to get the detailed execution logs for each Environment.



Viewing the Package Execution History

The PACKAGE EXECUTION HISTORY displays the execution history of each Package Line. It displays the Workflow Step name, execution date, and outcome (succeeded or failed) of each Execution step.

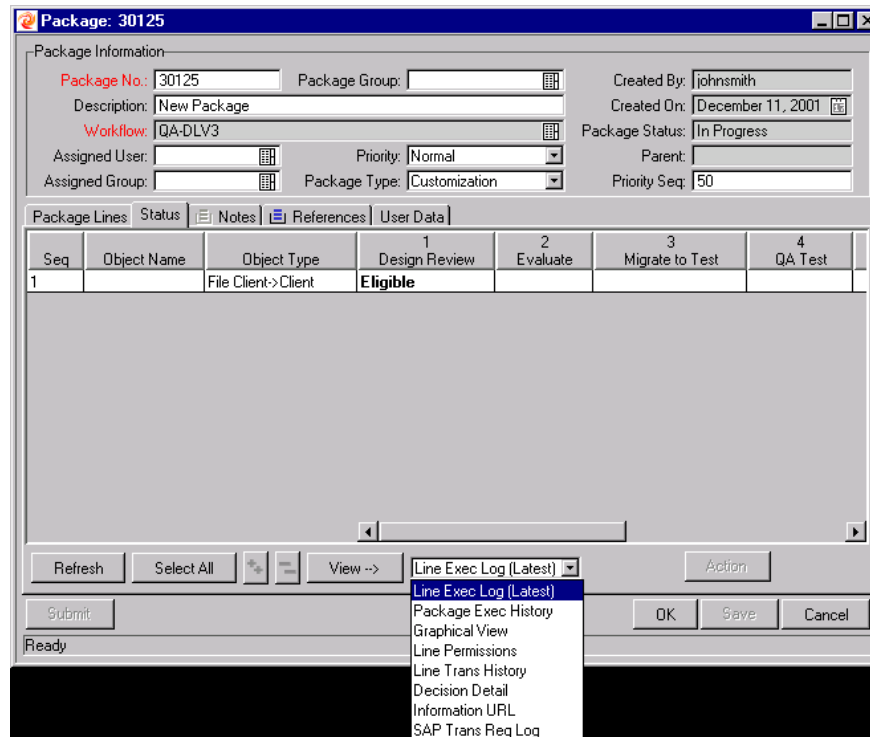
Kintana Deliver
Execution Log History

Package ID 53737

1.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	2 - Prepare for Check Out
	93866	Finished:	April 13, 2002 08:23:56 AM PDT - Succeeded
2.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	3 - Check Out Partial Source
	93867	Finished:	April 13, 2002 08:57:57 AM PDT - Succeeded
3.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	11 - Create Scripts
	93870	Finished:	April 13, 2002 09:00:12 AM PDT - Succeeded
4.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	12 - Clone Gold
	93871	Finished:	April 13, 2002 09:39:32 AM PDT - Succeeded
5.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	13 - Prepare Seed Data
	93872	Finished:	April 13, 2002 09:41:27 AM PDT - Succeeded
6.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	14 - Extract Seed Data
	93873	Finished:	April 13, 2002 09:44:58 AM PDT - Succeeded
7.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	4 - Check Out Rest Source
	93869	Finished:	April 13, 2002 09:54:05 AM PDT - Succeeded
8.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	15 - Export Gold Clone
	93874	Finished:	April 13, 2002 10:03:15 AM PDT - Succeeded
9.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	5 - Check Out Manuals and Upgrade Codes
	93868	Finished:	April 13, 2002 10:38:22 AM PDT - Succeeded
10.	Execution	Workflow:	RM: Kintana Build Process
	Batch	Workflow Step:	6 - Compile Source Code
	93875	Finished:	April 13, 2002 10:57:26 AM PDT - Succeeded

To view the PACKAGE EXECUTION HISTORY for a particular Package Line:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.

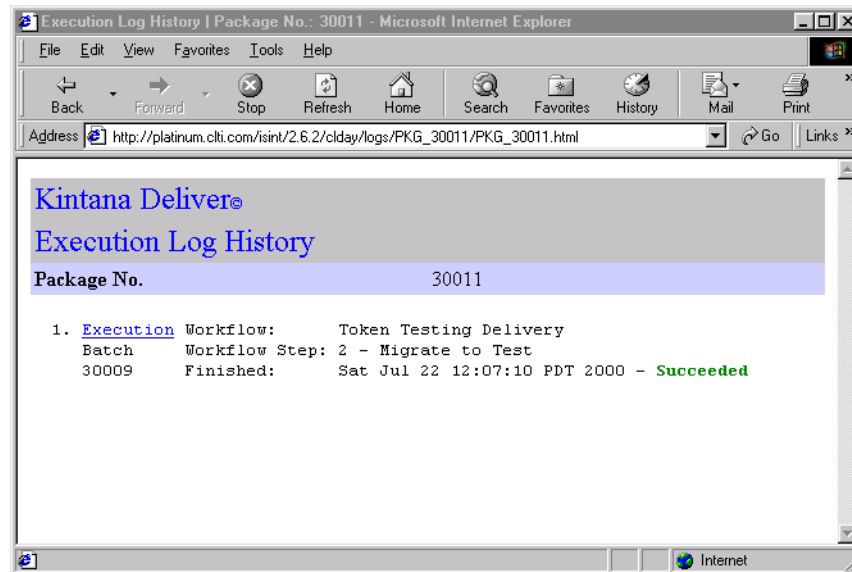


2. Select **PACKAGE EXEC HISTORY** from the drop down list next to the **VIEW-->** button near the bottom of the window.
3. Click **VIEW-->**. This opens a browser window displaying the Package EXECUTION LOG HISTORY.



Note

If the Package Line has been configured to migrate to multiple Environments using a Kintana Environment Group, the execution log returns an execution summary and link for each DESTINATION ENVIRONMENT. Click the link to get the detailed execution logs for each Environment.



Graphically Viewing a Package Line Status Within a Workflow

To graphically view a Package Line status for a particular Package Line:

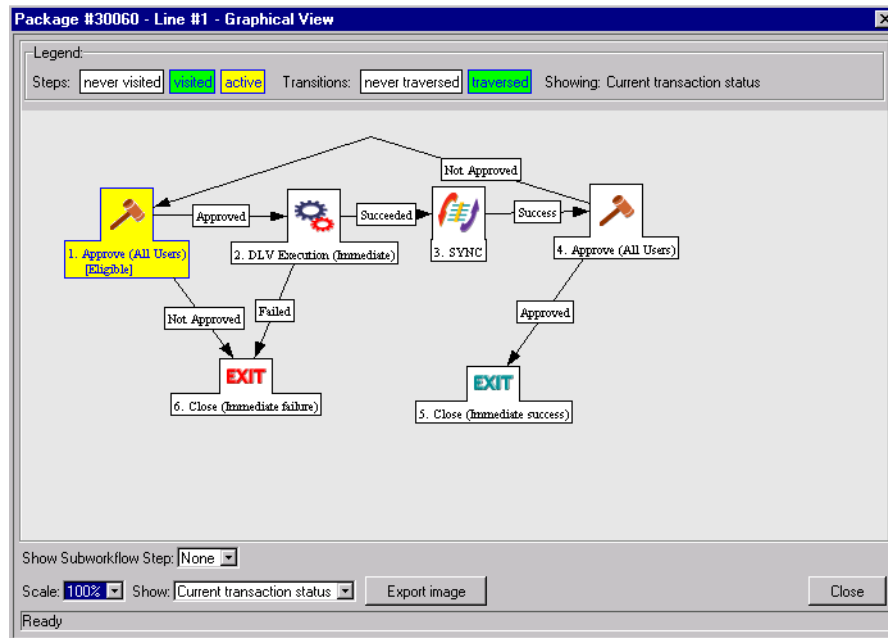
1. Navigate to the Package's **STATUS** tab in the PACKAGE window.
2. Select a Package Line.

The screenshot shows a software window titled "Package: 30125". The "Package Information" section includes fields for Package No. (30125), Description (New Package), Workflow (QA-DLV3), Assigned User, Assigned Group, Package Group, Package Type (Customization), Created By (johnsmith), Created On (December 11, 2001), Package Status (In Progress), Parent, and Priority Seq (50). Below this is a "Package Lines" section with a table and a "View -->" dropdown menu.

Seq	Object Name	Object Type	1 Design Review	2 Evaluate	3 Migrate to Test	4 QA Test
1		File Client->Client	Eligible			

The "View -->" dropdown menu is open, showing options: Line Exec Log (Latest), Package Exec History, Graphical View, Line Permissions, Line Trans History, Decision Detail, Information URL, and SAP Trans Req Log.

3. Select **GRAPHICAL VIEW** from the drop down list next to the **VIEW-->** button near the bottom of the window.
4. Click **VIEW-->**. This opens the **GRAPHICAL VIEW** window. Use the legend at the top of the window to determine which **Workflow Steps** have been visited and which steps are active.



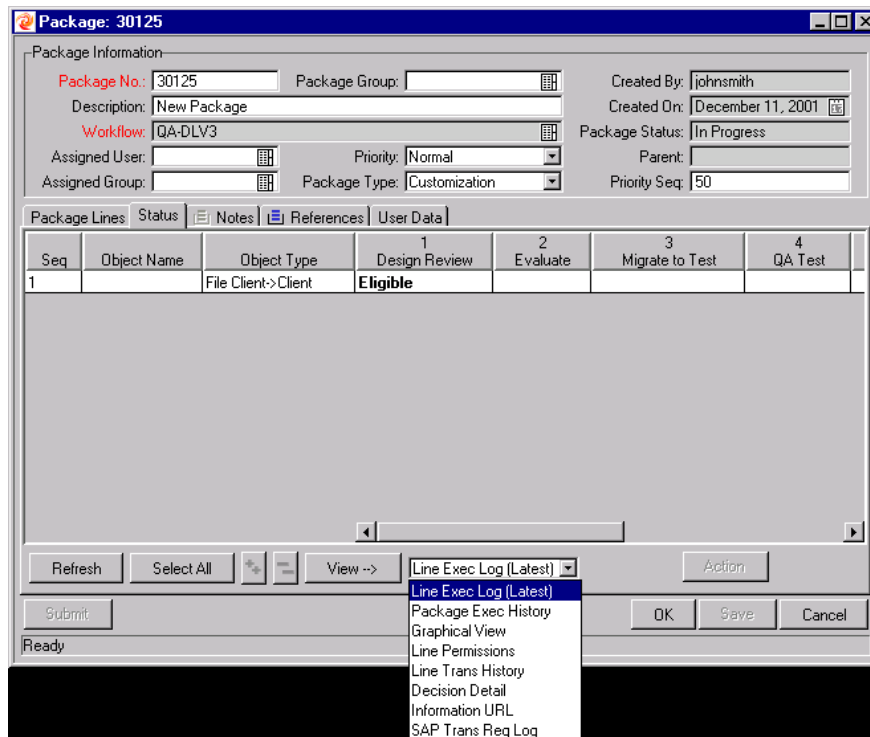
This image displays all of the Workflow Steps and Subworkflows used in the Workflow definition.

To obtain a graphical view of a particular Subworkflow, select the Subworkflow name from the SHOW SUBWORKFLOW STEP drop down list located at the bottom of the window. This opens a new window that displays the graphical view of that Subworkflow.

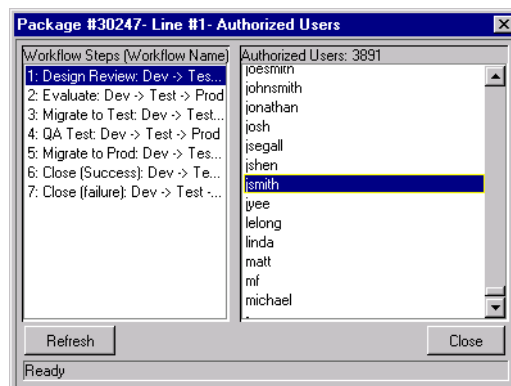
Viewing Line Permissions

To view the permissions for acting on a particular Package Line:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.
2. Select a Package Line.



3. Select **LINE PERMISSIONS** from the drop down list next to the **VIEW-->** button near the bottom of the window.
4. Click **VIEW-->**. This opens the **AUTHORIZED USERS** window and displays the users who can act on the specific steps in the current Package Line. Each Workflow Step is linked to a unique set of **AUTHORIZED USERS**.





Note

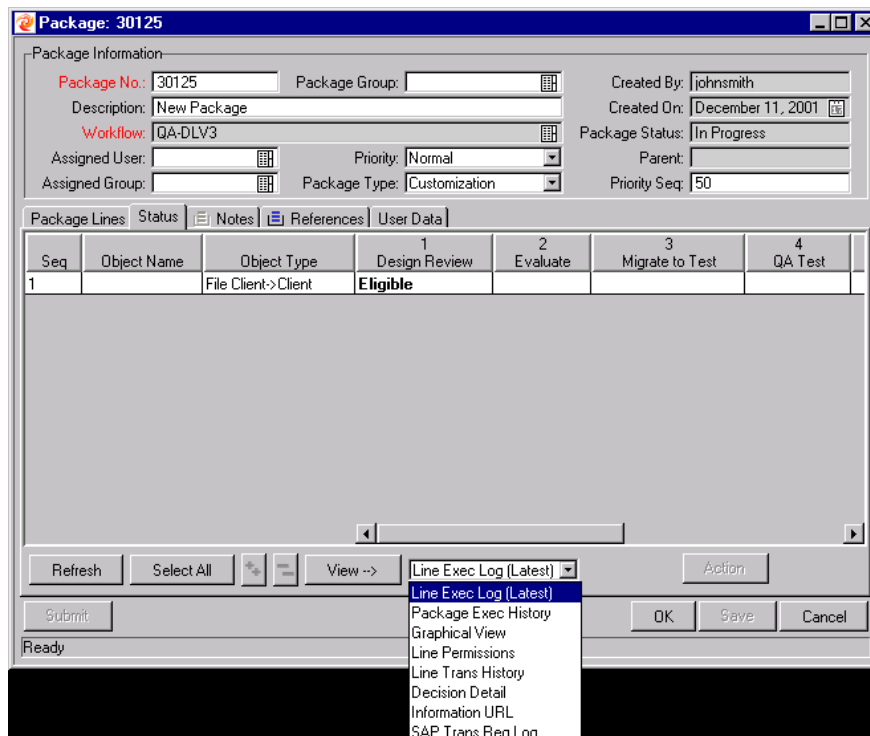
Workflow permissions are established during the initial Workflow configuration. The LINE PERMISSIONS lists all users in Security Groups that have been enabled for the related Workflow. If you have questions regarding the permissions set for a particular Workflow Step, consult your Kintana Administrator.

Viewing the Line Transaction History

You can view the transaction history of each Package Line. This provides detailed information on how the Package Line has proceeded through a Deliver Workflow. Information such as the date of the transaction event, the user linked to the Workflow Step, the Workflow Step name and number, status and results are displayed.

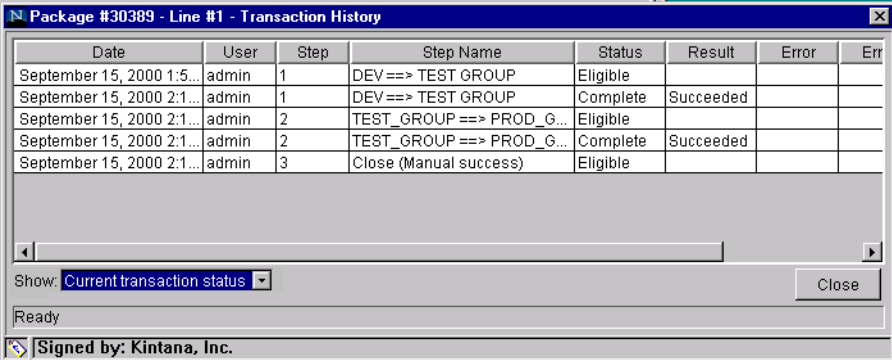
To view the LINE TRANSACTION HISTORY for a particular Package Line:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.
2. Select a Package Line.



3. Select **LINE TRANS HISTORY** from the drop down list next to the **VIEW-->** button near the bottom of the **STATUS** tab.

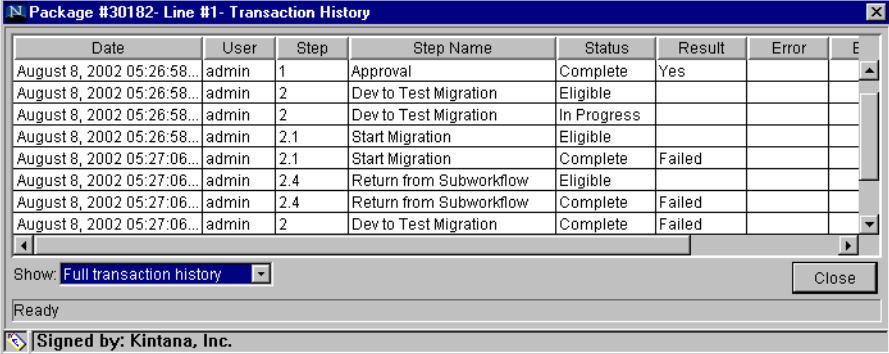
4. Click **VIEW-->**. The TRANSACTION HISTORY window opens.



5. Select either **CURRENT TRANSACTION STATUS** or **FULL TRANSACTION HISTORY** from the SHOW drop down list.



Select **FULL TRANSACTION HISTORY** to display information on the subworkflow steps that have been traversed more than once by a single Package Line. An example of a Package that retries a subworkflow step and then returns from the subworkflow is shown below.

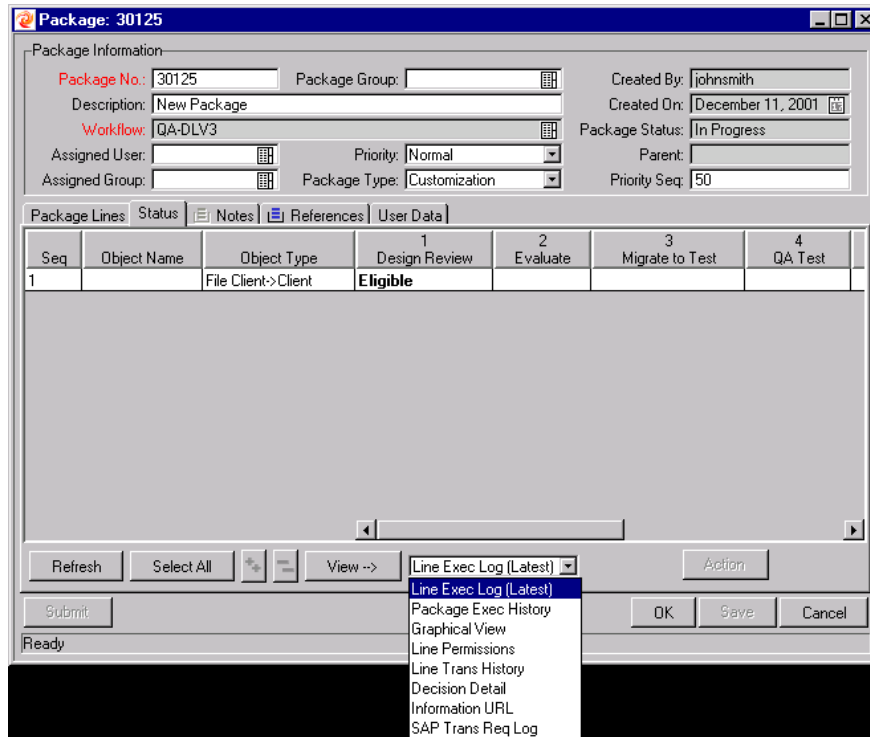


Selecting **CURRENT TRANSACTION STATUS** will display only information on the most recent transaction through that step.

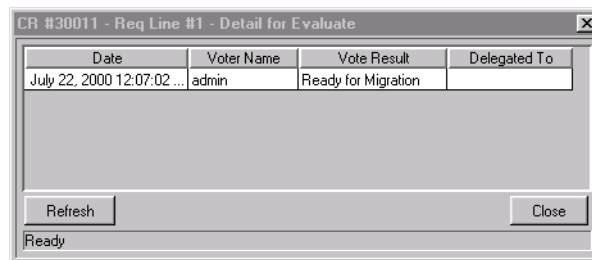
Viewing the Decision Detail

To view the results of a particular Decision step:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.
2. Select a Package Line.



3. Select the step for which you would like to see the decision results.
4. Select **DECISION DETAIL** from the drop down list next to the **VIEW-->** button near the bottom of the window.
5. Click **VIEW-->**. This opens the **DETAIL FOR EVALUATE** window.

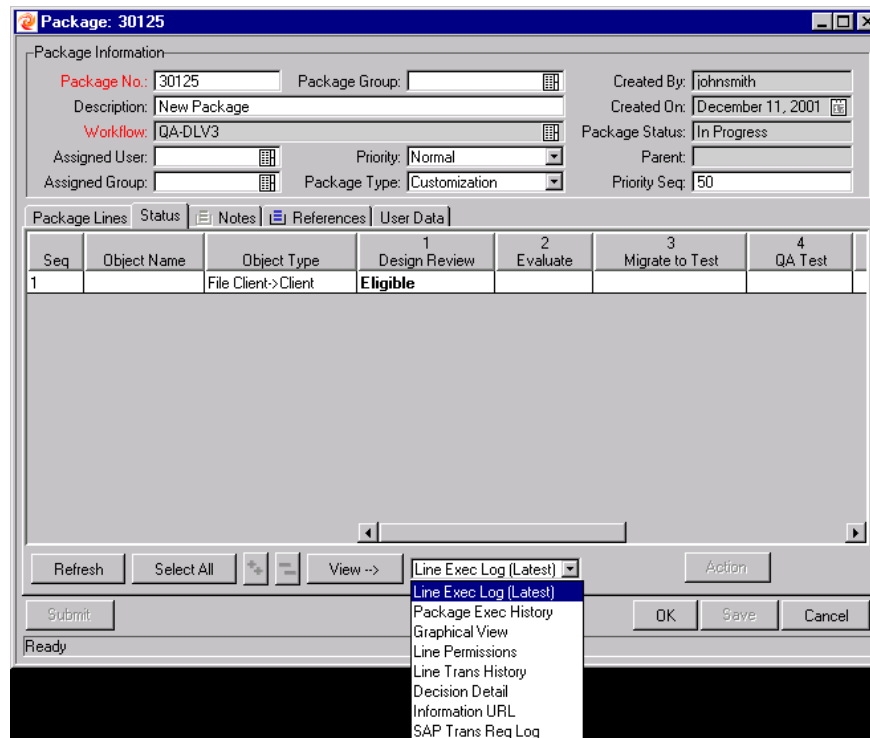


Viewing the Concurrent Package Log

Kintana Deliver is able to track and report on system-triggered concurrent Packages. Users can view the Oracle Applications Concurrent Package Logs for Package activities.

To view the Concurrent Package Log for a particular Package:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.
2. Select a Package Line.



3. Select **LINE EXEC LOG (LATEST)** from the drop down list next to the **VIEW-->** button near the bottom of the window.
4. Click **VIEW-->**. This opens a browser window displaying the LINE EXECUTION LOG.

The Line Execution Log contains a section titled **CONCURRENT REQUEST OUTPUT** that contains the Concurrent Package Log.



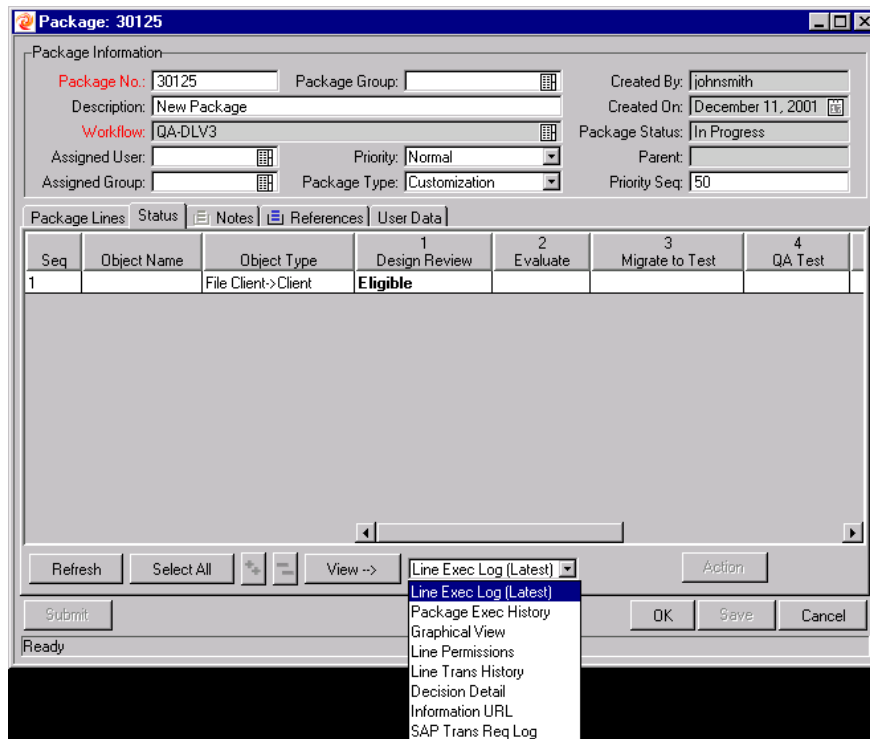
Note

If the Package Line has been configured to migrate to multiple Environments using a Kintana Environment Group, the execution log returns an execution summary and link for each Destination Environment. Click the link to get the detailed execution logs for each Environment.

Viewing the Workflow Step Information URL

To view information on a particular Workflow Step:

1. Navigate to the Package's **STATUS** tab in the PACKAGE window.



2. Select the step for which you would like to see the WORKFLOW STEP INFORMATION.
3. Select **INFORMATION URL** from the drop down list next to the **VIEW-->** button near the bottom of the window.
4. Click **VIEW-->**. This opens a new browser window which contains information specific to the selected Workflow Step.

Updating References

Package References can be updated from the **REFERENCES** tab of the PACKAGE window in the Kintana Workbench and the REFERENCES section of the PACKAGE DETAIL page in the Kintana HTML interface. See [“Adding a Reference”](#) on page 46 for details on adding a Reference to a Package and additional information on setting dependent relationships to references.

Changing a Reference

To modify an existing Reference from the Kintana Workbench:

1. Navigate to the Package's **REFERENCES** tab in the PACKAGE window.
2. Click in the referenced entity's Relationship column and select the desired relationship from the drop down list that appears. For URLs and Attachments, the Description is editable.
3. Click **OK** or **APPLY**.

Deleting a Reference

To delete an existing Reference from the Kintana Workbench:

1. Navigate to the Package's **REFERENCES** tab in the PACKAGE window.
2. Select the reference to be deleted and click **REMOVE**.

The reference is removed and deleted from the Kintana server.

Acting on an Eligible Step - Overview

Once submitted, each Package Line has one or more Workflow Steps set to **ELIGIBLE**, as shown in *Figure 5-3*. This indicates that the given execution or decision steps need to be performed first in the Package's resolution process. If you have permission to act on the ELIGIBLE step, the text in the STATUS column appears in boldface type.

When a step is ELIGIBLE, one of the following actions are required:

- A user must execute some action and then report the result in Kintana Deliver
- Or
- A user must make a decision and report that decision in Kintana Deliver.

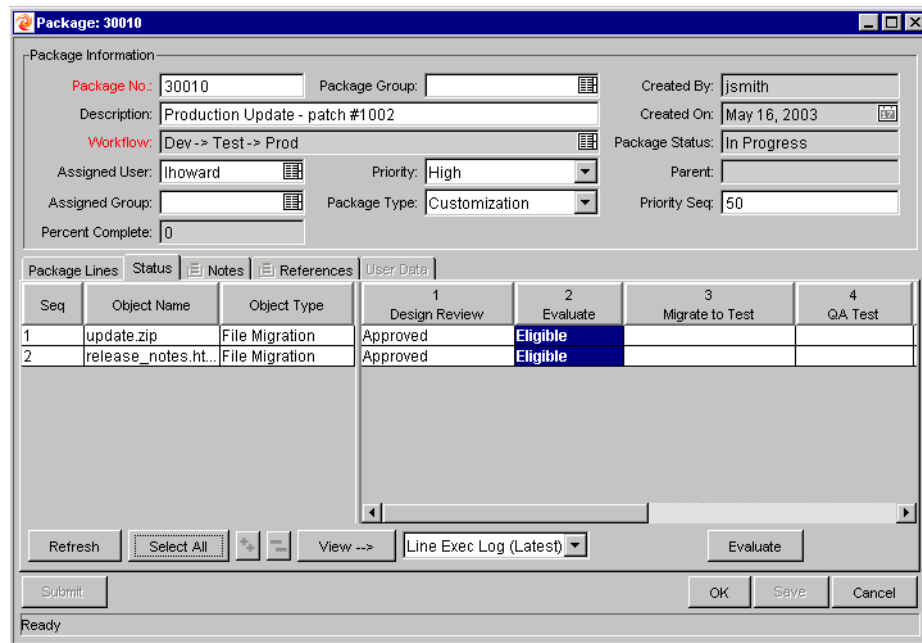


Figure 5-3 Status Tab Eligible Steps

Once the appropriate Kintana Deliver user executes the action or makes the decision, the user employs Kintana Deliver to indicate the outcome of the step.

To indicate the outcome of a step:

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the eligible Workflow Step to be processed.

A single step for a single Package Line can be selected or multiple steps for multiple Lines can be selected. Click **SELECT ALL** to automatically select all the steps on all the open Lines that are currently eligible for action.

You cannot act on multiple Workflow Steps at once; if you select cells for multiple Workflow Steps, the **ACTION** button remains disabled. If the user has the security privileges to perform the given Workflow Step, the button becomes enabled. Refer to *“Viewing Line Permissions”* on page 92 for instructions on viewing Workflow Step line permissions.

Once a Workflow Step is selected, the button at the bottom right of the **STATUS** tab changes its title (originally ‘**ACTION**’) to the given step name.

3. Once the **ACTION** button is enabled, click it to perform the action or decision. This opens either the EXECUTION or DECISION window.

4. In either the EXECUTION or DECISION window, select the step's result. Each step is pre-configured with a selection of valid results. In addition to selecting a result, you can also enter free-form comments in this window.
5. Click **OK** to close the PACKAGE window.

Whether the step is a DECISION or EXECUTION, the result of the step is processed by the Kintana Workflow engine and can lead to a number of changes. Based on the Workflow definition (which can contain multiple Workflow Steps and Subworkflows) the given Workflow Step result can cause additional Workflow Steps to become ELIGIBLE, indicating the next actions to be performed in the Package resolution process.

When subsequent steps become ELIGIBLE, those steps are completed sequentially, making ELIGIBLE the next Workflow Step(s) in line. This process continues until the Package reaches its final state and becomes resolved, usually at a CLOSE step.

Note

The final Package state might not always be a successful migration. A Package might be divided into several Packages that are more manageable, or the Package be cancelled altogether.

You can use the **STATUS** tab to see:

- All the possible actions that can take place for the Package
- All the actions that have taken place so far
- The current pending actions that need to be taken for Package resolution

Note

If you have Package Manager authority, it is also possible to Cancel a Package at any point using the **PACKAGE -> CANCEL PACKAGE** menu option.

Updating Packages in the Kintana Deliver HTML Interface

The following actions can be performed on Packages in the Kintana Deliver HTML interface:

- [Approving Packages in Kintana Deliver](#)
- [Adding a Reference to a Package](#)

Approving Packages in Kintana Deliver

To approve a Package using the HTML interface:

1. Logon to Kintana. Your KINTANA HOME page opens.
2. Navigate to the details page for the Package you want to approve.

The following process of approving a Package in the Kintana Deliver HTML interface starts in the Package Details page. You can access a Package's Details page using any of the following methods:

- From the MY PACKAGES portlet, click the PACKAGE NUMBER of the Package to be approved.
- Selecting **SEARCH > PACKAGES** from the menu and searching for the desired Package. From the PACKAGE SEARCH RESULTS page, click the PACKAGE NUMBER of the Package to be approved.
- In an email notification, click the URL of the Package to be approved.

The PACKAGE DETAILS page for an example Package is shown below.

The screenshot displays the 'Package 30004' details page in the Kintana Deliver interface. The page is divided into several sections:

- Header:** Includes 'Save' and 'Reset' buttons.
- Form Fields:**
 - Package No.: 30004
 - Description: Patching the Web Server
 - Workflow: Dev -> Test -> Prod
 - Assigned User: jmetzger
 - Priority: Low
 - Package Type: Customization
 - Created By: jsmith
 - Created On: May 15, 2003
 - Status: In Progress (Pending Request #30002 - 0%)
 - Parent: (empty)
 - Priority Seq: 50
 - Percent Complete: 0
- Status:** Shows a workflow diagram with steps: 1: Design Review, 2: Evaluate, 3: Migrate to Test.
- Notes:** A text area for 'Notes to be added on save:'.
- References:**
 - Requests Table:**

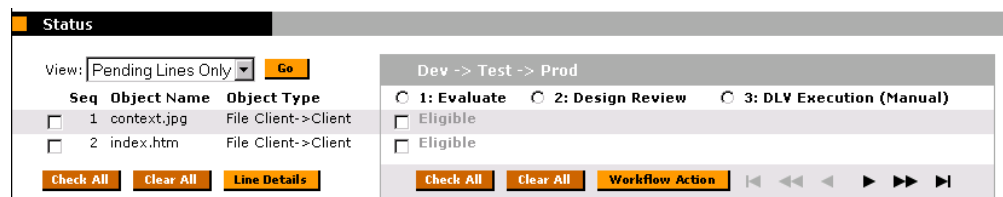
Req #	Assigned User	Description	Request Type	Status	% Complete	Relationship	Relationship Details
30002		Paper Free	PPH - Project Request	New	0%	Predecessor	Blocking: Action not allowed on Package 30004 until Reque...
 - Projects/Tasks Table:**

Name	Project Manager/Resource	Master project	State	% Complete	Relationship	Relationship Details
Kintana Release 5.0	John Smith	Kintana Release 5.0	New	0%	Related to	Informational: Project 30301 is related to Package 30004
- Reference Additions:** A section for adding new references with an 'Add' button and a text area for 'References to be added on Save:'.

3. The STATUS section of the PACKAGE DETAILS page displays the Package Line(s) for the Workflow. In the Status section, you can select the following display option from the VIEW drop down list:
 - **PENDING LINES ONLY** to display only those Package Lines that are eligible for action. Click **Go** to use this option.

or

 - **ALL LINES** to display all the Package Lines for the Workflow. Click **Go** to use this option.



4. Select the check box to the left of the SEQ column for the Package Line that contains a step you want to approve or disapprove.
5. (Optional) To display details about the selected Package Line in a separate browser window, click **LINE DETAILS**.
6. Under the Workflow name are the numbered steps that must be completed and approved to move the Workflow to completion. You can move forward or backward through the Workflow's Steps by clicking the directional arrows.
7. Select the radio button to the left of the numbered Workflow Step to be approved.
8. Select the ELIGIBLE checkbox under the STEP you want to approve or disapprove. You can check all eligible boxes for the Workflow Step by clicking **CHECK ALL**. This lets you approve or disapprove a number of steps at one time instead of individually.

You can uncheck all eligible boxes for the Workflow Step by clicking **CLEAR ALL**.
9. If one or more Package Lines are selected for action, click **WORKFLOW ACTION**. The PACKAGE: WORKFLOW ACTION page opens.

Package Search > Search Results > Package #30014 Sign Out

Package: Workflow Action

Summary

Package #: 30014 Workflow: Dev -> Test -> Prod
Description: Production Update - patch #1443

Action Required

Please choose an outcome for the step:

Design Review

Approved

Not Approved

Notes:

Seq	Object Name	Object Type
1	update.zip	File Migration

OK **Cancel**

10. Under ACTION REQUIRED, select the outcome of the step. The outcome is configurable and can therefore be different for each Workflow Step, depending on the configuration at your site. In the above example the possible actions are:

- If the Workflow Step is ready for approval, select **APPROVED**.
- or
- If the Workflow Step is not ready for approval, select **NOT APPROVED**.

11. Enter any necessary information in the NOTES text area.

12. Click **OK**. You return to the PACKAGE DETAILS page.

Since you approved or disapproved the designated Workflow Step(s), the Workflow has moved onto the next step. Another user is probably responsible for approving/disapproving the next step in the Package Line. This process continues until the Package moves through all of its steps to resolution.



Note

You can only approve Package decision steps using the standard Kintana interface. To perform execution steps, logon to the Kintana Workbench.

Adding a Reference to a Package

You can add a reference to a Package from the Kintana interface. There are several reference types defined in Kintana Deliver: ATTACHMENT, PACKAGE,

PROJECT, RELEASE, REQUEST, TASK, and URL. For some reference types, such as for Requests and other Packages, you can create a functional dependency to the reference. For example, you can specify that a Request is a “Predecessor” to the Package. This means that the Package will not continue until the Request closes.

To add a Reference to a new or existing Package:

1. Open the Package page. You can locate your Package using the **SEARCH > PACKAGES** menu item.

The screenshot displays the 'Package 30014' page. At the top, there's a breadcrumb trail: 'Package Search > Search Results > Package #30014' and a 'Sign Out' link. The main header shows 'Package 30014' with 'Save' and 'Reset' buttons. Below this is a form with various fields:

- Package No.:** 30014
- Package Group:** (empty)
- Created By:** jsmith
- Description:** Production Update - patch #1443
- Created On:** May 16, 2003
- Workflow:** Dev -> Test -> Prod
- Status:** In Progress
- Assigned User:** ssingh
- Priority:** Normal
- Parent:** (empty)
- Assigned Group:** (empty)
- Package Type:** Patch
- Priority Seq:** 50
- Percent Complete:** 0

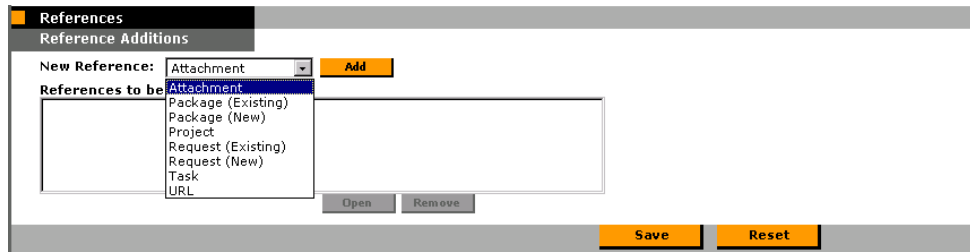
 The 'Status' section includes a 'View' dropdown set to 'Pending Lines Only' and a 'Go' button. Below it is a table with columns 'Seq', 'Object Name', and 'Object Type'. One entry is visible: '1 update.zip File Migration'. To the right of the table are radio buttons for '1: Design Review' (selected), '2: Evaluate', and '3: Migrate to Test'. There are also 'Check All', 'Clear All', and 'Workflow Action' buttons.

 The 'Notes' section has a text area for 'Notes to be added on save:'.

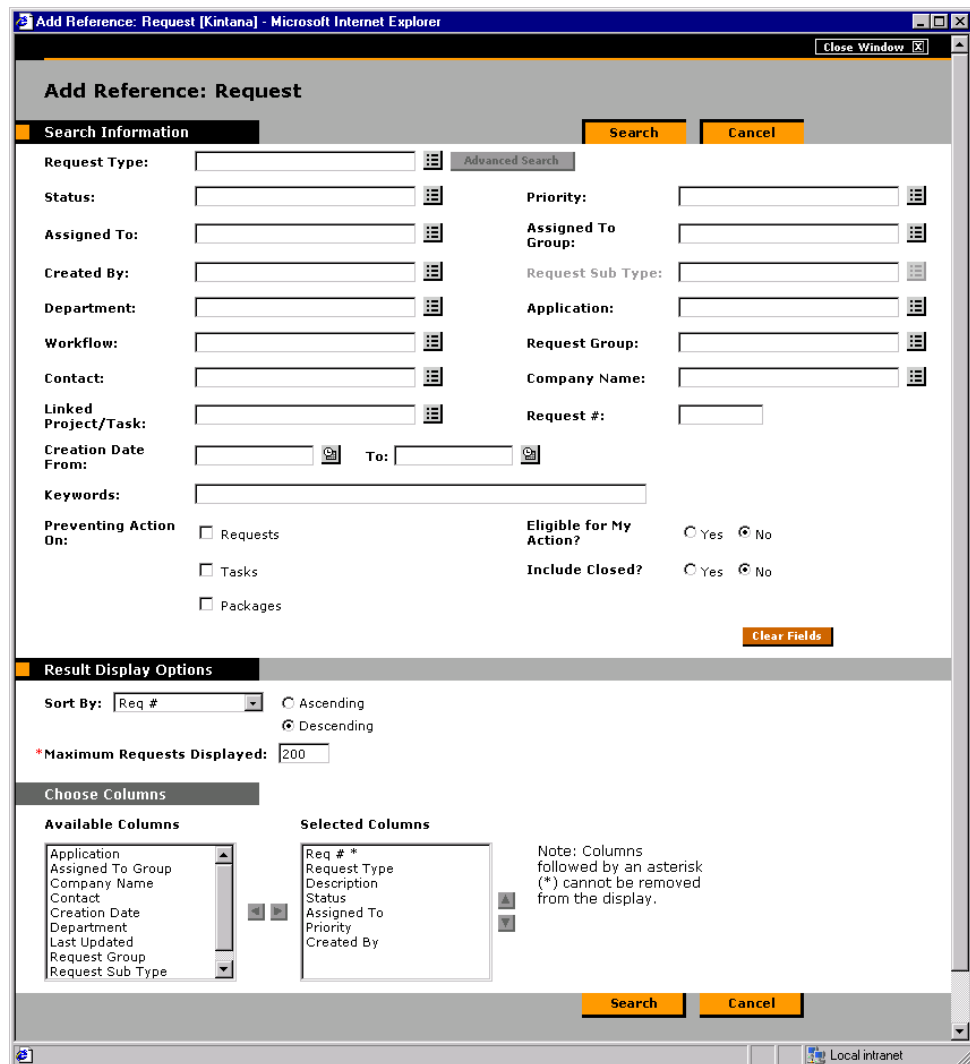
 The 'References' section has a 'Reference Additions' sub-section with a 'New Reference:' dropdown set to 'Attachment' and an 'Add' button. Below this is another text area for 'References to be added on Save:' with 'Open' and 'Remove' buttons.

 At the bottom of the form, there are 'Save' and 'Reset' buttons.

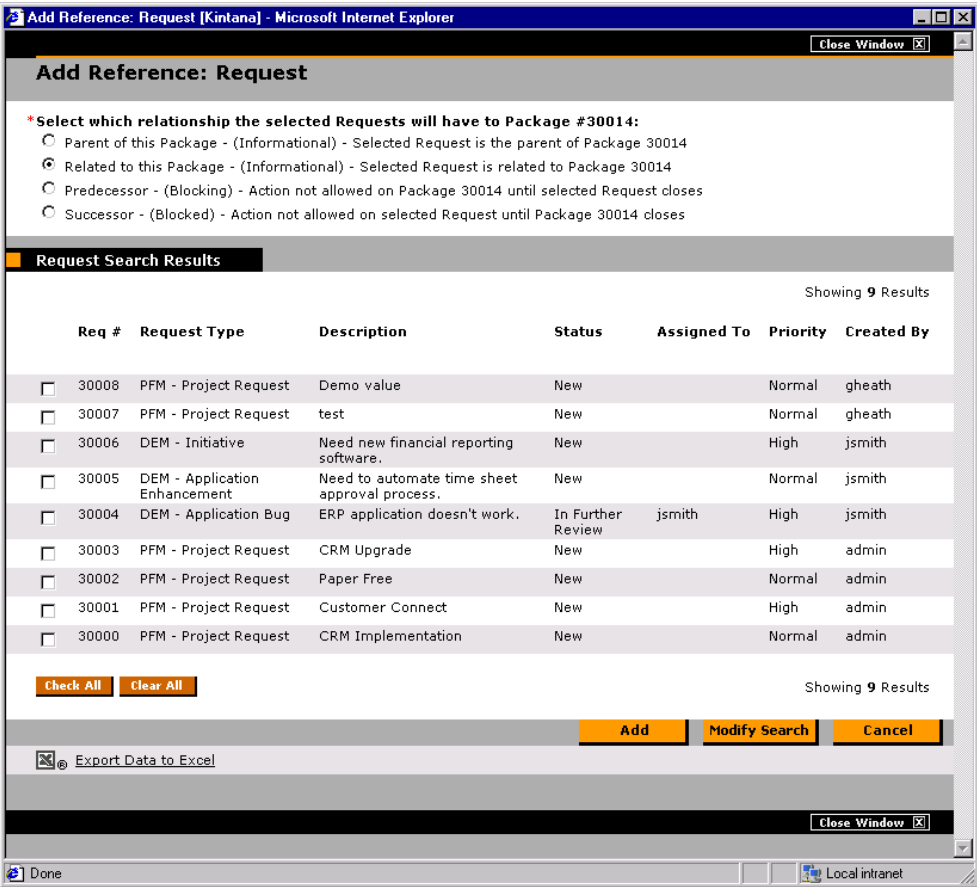
2. From the NEW REFERENCE field, select the type of Reference that you would like to add. See “*Valid Package References*” on page 61 for a list of available References.



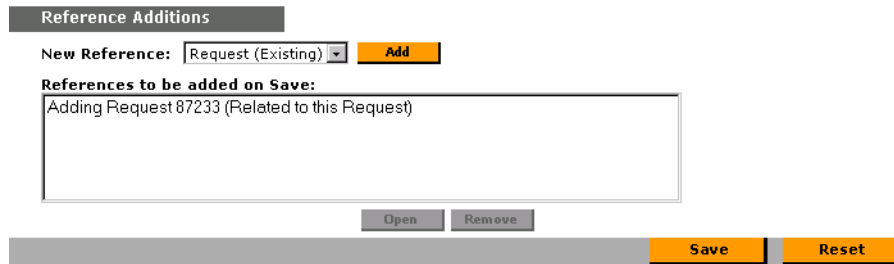
3. Click **ADD**. If you are adding a Package, Request, Task or Project, a page opens presenting search criteria for the entity to be referenced. The following figure displays the page that opens when adding a reference to an existing Request.



- 4. Enter the appropriate information and click **SEARCH**. A page opens presenting search results.



- 5. Select the check box next to the entity or entities to be referenced. To check all boxes, click **CHECK ALL**. To uncheck all boxes, click **CLEAR ALL**.
- 6. Select a relationship by clicking on of the relationship radio buttons. For a complete list of all reference relationships, see *Table D-4 on page 18*.
- 7. Click **ADD**.
- 8. The entities referenced appear in the REFERENCES TO BE ADDED ON SAVE list on the Package **DETAIL** page. *The References have not been added yet.*

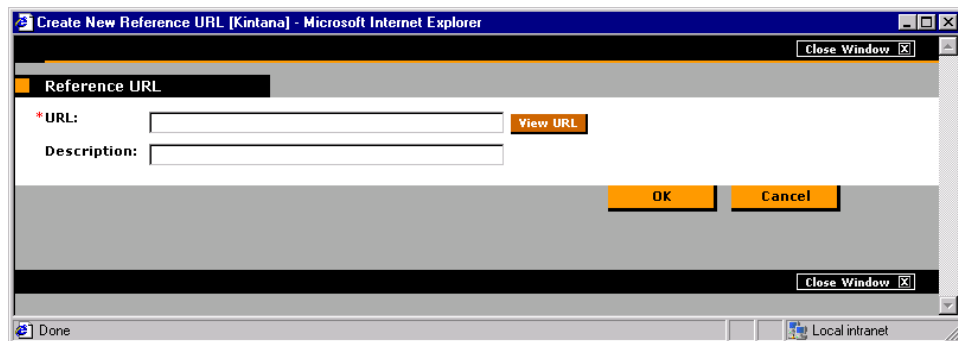


9. Click **SAVE** to add the References to the Package.

Referencing a URL in Kintana Deliver

To add a URL as a Reference:

1. Navigate to the Package's **DETAIL** page and scroll down to the **REFERENCES** section.
2. Select **URL** from the **NEW REFERENCE** drop down list and click **ADD**. The Reference URL page opens.



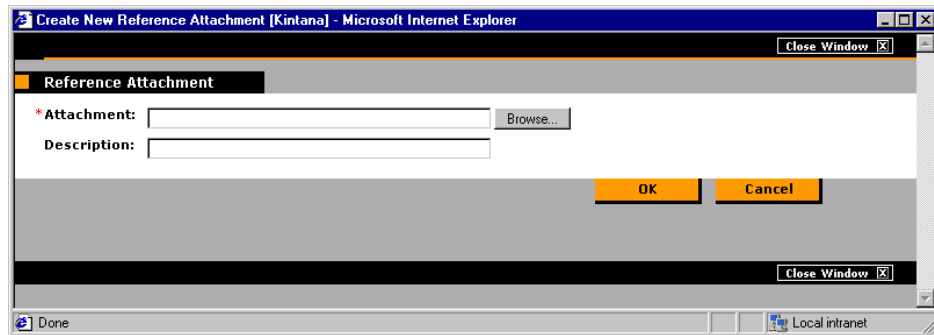
3. Type the URL into the URL field and enter a description if desired.
4. Click **OK** to add the specified URL as a Reference.
5. The referenced URL appears in the **REFERENCES TO BE ADDED ON SAVE** list on the Package **DETAIL** page. *The Reference has not been added yet.*
6. Click **SAVE** to add the Reference to the Package.

Referencing an Attachment in Kintana Deliver

To add an attachment as a Reference:

1. Navigate to the Package's **DETAIL** page and scroll down to the **REFERENCES** section.

2. Select **ATTACHMENT** from the NEW REFERENCE drop down list and click **ADD**. The REFERENCE ATTACHMENT page opens.



3. Select the desired file from your local machine and enter a description if desired.
4. Click **OK** to add the selected attachment as a Reference.
5. The referenced attachment appears in the REFERENCES TO BE ADDED ON SAVE list on the Package DETAIL page. *The Reference has not been added yet.*
6. Click **SAVE** to add the attachment to the Package.

Processing Packages in the Kintana Workbench

From the Kintana Workbench, users can perform the following actions related to Package processing:

- [“Acting on a Decision Step”](#) on page 109
- [“Acting on an Execution Step”](#) on page 112
- [“Using Notifications”](#) on page 114
- [“Adding a Package Line to an ‘In Progress’ Package”](#) on page 115
- [“Cancelling Package Lines”](#) on page 117
- [“Deleting Packages”](#) on page 119

Acting on a Decision Step

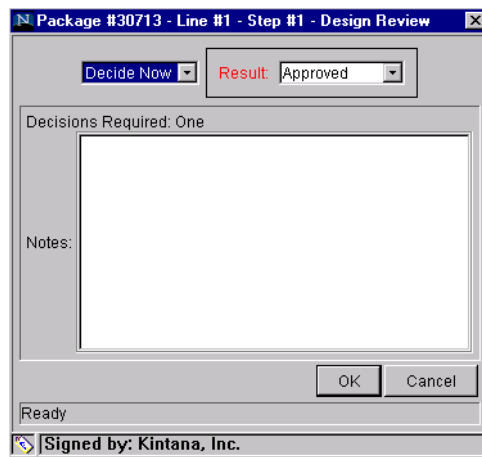
For Decision steps, you can act on the step in two different ways:

- *Making the Decision on a Decision step*
- *Delegating the Decision on a Decision Step*

Making the Decision on a Decision step

To act on a Decision step:

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the **ELIGIBLE** Decision step. The **ACTION** button is enabled.
3. Click **ACTION**. The PACKAGE DECISION window opens.



4. Select **DECIDE NOW** from the drop down list.
5. Select the desired **RESULT** (such as **APPROVED** or **FAILED**) and enter any relevant notes in the **NOTES** field.
6. Click **OK**.

The Decision has been made and entered into the system.



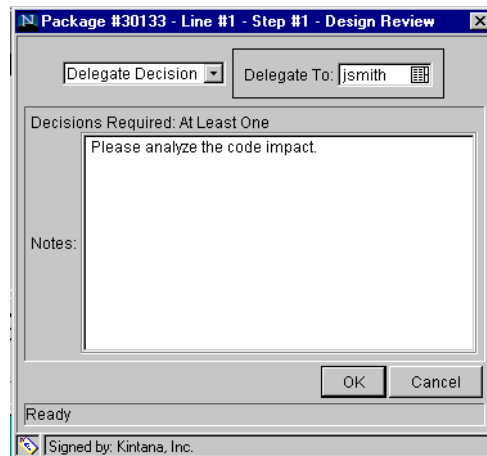
Note

If the step has been configured so that more than one person has to decide on the result, the Package Line may not move to the next step until all decisions are made. For Decision steps that require more than one person to decide on the result, you can view the current decision results for the Workflow Step using the Decision Detail. For instructions on viewing the Decision Detail, refer to *“Viewing the Decision Detail”* on page 95.

Delegating the Decision on a Decision Step

If a Workflow Step has been configured for more than one user to participate in a decision, you can delegate your decision to another Kintana user. To delegate the decision on a Decision step:

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the **ELIGIBLE** Decision step. The **ACTION** button is enabled.
3. Click **ACTION**. The Package **DECISION** window opens.



4. Select **DELEGATE DECISION** from the drop down list.
5. Select the user to whom you would like to delegate the decision responsibility in the **DELEGATE TO** field.
6. Click **OK**.

The user to whom you delegated your decision now has authority to vote on the Workflow Step, even if that user did not previously have authority to do so.



Note

If the step has been configured so that more than one person has to decide on the result, the Package Line may not move to the next step until all decisions are made. However, once your decision has been recorded, the step will remain **ELIGIBLE** but the cell will be unbolded, indicating that you no longer need to act on this step.

For Decision steps that require more than one person to decide on the result, you can view the current decision results for the Workflow Step using the Decision Detail. For instructions on viewing the Decision Detail, refer to [“Viewing the Decision Detail”](#) on page 95.

Acting on an Execution Step

You can act on Execution type steps in three different ways:

- [Starting the Execution Process](#)
- [Scheduling an Execution Step for a Later Time](#)
- [Bypassing the Execution](#)

Starting the Execution Process

To Start the execution process for an **ELIGIBLE** Execution Step

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the **ELIGIBLE** Execution step. The **ACTION** button is enabled.
3. Click the **ACTION** button. The PACKAGE EXECUTION window opens.



4. Select **EXECUTE NOW** from the drop down list.

5. Click **OK**.

The execution process has begun.

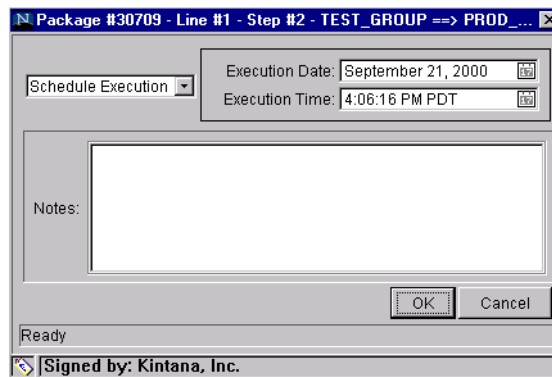


This process could be a software migration, execution of a PL/SQL function, the closing of the Package Line, or a number of other activities. The Kintana Execution engine executes the step and sets the result accordingly.

Scheduling an Execution Step for a Later Time

To schedule an execution step for a later time:

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the **ELIGIBLE** Execution step. The **ACTION** button is enabled.
3. Click **ACTION**. The PACKAGE EXECUTION window opens.



4. Select **SCHEDULED EXECUTION** from the drop down list.
5. Fill in the EXECUTION DATE and EXECUTION TIME for when you would like the step to execute.
6. Click **OK**.

The execution process will begin on the scheduled date and time.



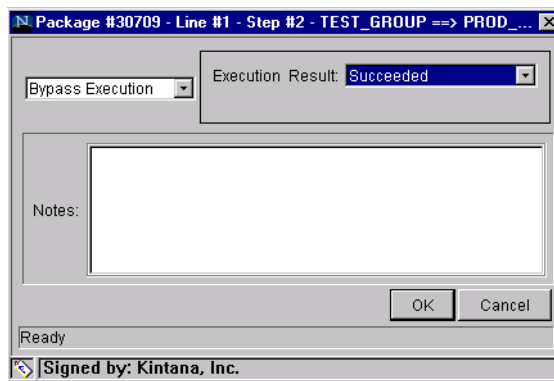
You might choose to schedule a software migration for later in the evening when fewer users are on the system. At the scheduled time, the Kintana Execution engine executes the step and returns the result.

Bypassing the Execution

You can also bypass the execution and manually set the result of the step without the Kintana Execution engine performing any activity.

To bypass the execution:

1. Navigate to the Package **STATUS** tab for the desired Package.
2. Select the **ELIGIBLE** Execution step. The **ACTION** button is enabled.
3. Click **ACTION**. The PACKAGE EXECUTION window opens.



4. Select **BYPASS EXECUTION** from the drop down list.
5. Select the desired result (such as **SUCCEEDED** or **FAILED**) from the EXECUTION RESULT drop down list.
6. Click **OK**.



If you know that a software migration has already been manually performed, you may want to mark the step as **SUCCESSFUL** without actually migrating the software again.

Using Notifications

As Package Lines make their way through their Package Workflow, email notifications are often sent to alert individuals regarding certain actions. The logic for when emails are sent and the content for each email is part of the definition for each Workflow.

Kintana notifications will typically instruct the user to review a Package or act on a pending Workflow Step (either an execution or a decision). Follow the instructions detailed in the notification for the appropriate course of action.

Figure 5-4 illustrates a sample Notification.

<http://machine.company.com/kintana/kintana.html>

```
Notified Users:   jsmith@kintana.com

Status change for Request #: 30004.
Description: Sample Notification
Priority: High
Workflow: Migration Workflow
Workflow Step: 1. Approve (One User)
Old Status:      New Status: Eligible
```

=====

Figure 5-4 Sample Notification

Adding a Package Line to an 'In Progress' Package

Aggressive maintenance of your business systems can introduce the need for quick code migrations using Kintana Packages. You may run into situations where you would like to add a Package Line to a Package that has already been submitted.



You define and submit a Package that includes a set of Objects to migrate into your production instance. After you click the **SUBMIT** button, a co-developer notifies you that there is one more file that needs to be migrated into production. You assess the change and decide that it falls within the logical unit of Objects that should be moved and tracked together. You decide to add a Package Line to an IN PROGRESS Package.

To add a Package Line to an 'IN PROGRESS' Package:

1. From the PACKAGE WORKBENCH, query and select the desired Package.
2. Click **OPEN**. The PACKAGE window opens.

Package: 30010

Package Information

Package No.: 30010 Package Group: [] Created By: jsmith
Description: Production Update - patch #1002 Created On: May 16, 2003
Workflow: Dev -> Test -> Prod Package Status: In Progress
Assigned User: jhoward Priority: High Parent: []
Assigned Group: [] Package Type: Customization Priority Seq: 50
Percent Complete: 0

Package Lines | Status | Notes | References | User Data

Seq	Object Type	App Code	1	2	
1	File Migration	(None)	File Location: Client	Sub-Path: /temp	File Name: update.zip
2	File Migration	(None)	File Location: Server	Sub-Path: /temp	File Name: release_note

Buttons: New Line, Edit Line, Copy Line, Remove Line, [Up], [Down], Submit, OK, Save, Cancel

Save Successful.

3. Click **NEW LINE**. The ADD LINE window opens.

Add Line

Object Type Information

Object Type: []
Sequence: 12 Application Code: None

Parameters | User Data

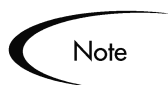
Buttons: Clear, OK, Add, Cancel

Enter an object type.

4. Select an **OBJECT TYPE**. The **PARAMETER** tab dynamically display fields corresponding to the selected Object Type.

5. Enter the parameters.
6. Click **OK** to accept the parameters and close the window or **ADD** to accept the parameters and reset the window for another line addition. The new line is added to the PACKAGE window.
7. Click **OK**.

The new Package Line has been added to the Package.



Note

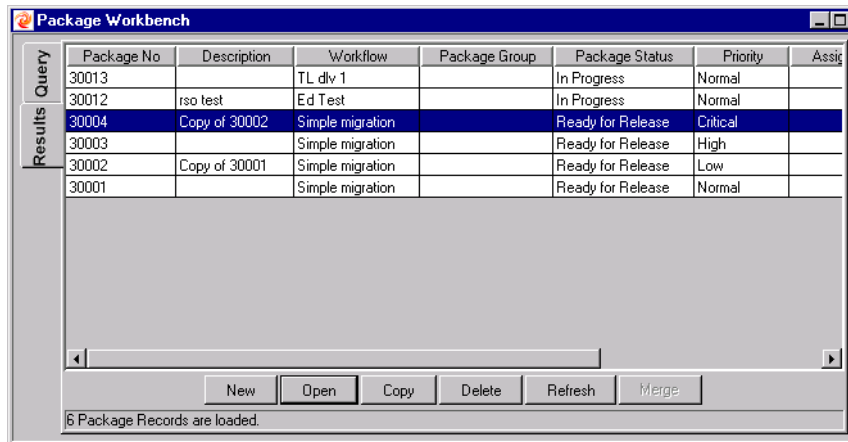
The new Package Line is *not* submitted until you click **OK** or **SAVE**. The **SUBMIT** button remains disabled throughout this process. The new Package Line is automatically submitted when the Package is saved. It is submitted to the first step in the Workflow, and the user can process it individually until it catches up with the other lines in the Package. When submitted, it is not automatically placed in the same status as the other lines.

Cancelling Package Lines

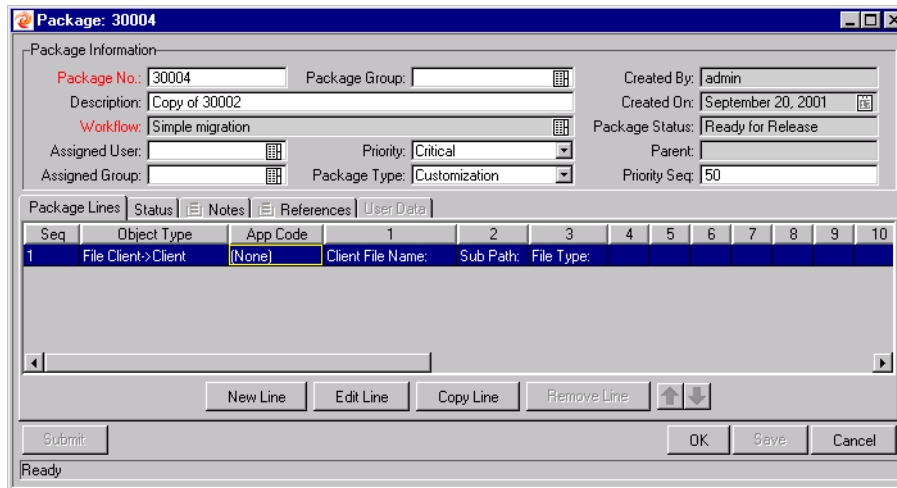
Package Lines may need to be cancelled occasionally, for a number of reasons; the files may be out of date, or no longer necessary.

To cancel a Package Line:

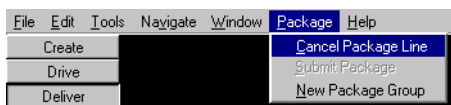
1. From the PACKAGE WORKBENCH, query and select the desired Package.



2. Click **OPEN**. The PACKAGE window opens.



3. Select the Package Line you wish to cancel.
4. Select **PACKAGE -> CANCEL PACKAGE LINE** from the menus at the top of the KINTANA WORKBENCH window.



The Package Line has been cancelled.

Deleting Packages

To delete an existing Package:

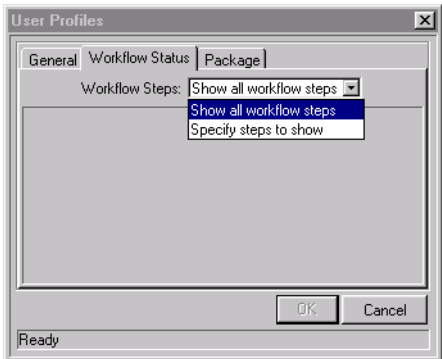
1. From the PACKAGE WORKBENCH, query and select the desired Package.
2. Click **DELETE**. A question dialog opens and asks you to confirm that you would like to delete the Package.
3. Click **OK** to delete the Package.

The Package is deleted from your Kintana system.

Configuring Workflow Display

You can configure the display of Workflow Steps in the **STATUS** tab by changing your **USER PROFILES**.

1. Select **EDIT -> USER PROFILES**.
2. Click the **WORKFLOW STATUS** tab.



3. Choose either to show all Workflow Steps or to limit your display of Workflow Steps in the **WORKFLOW STEPS** drop down list. If you choose to limit the steps that you see, you have the following options:
 - **SHOW TRAVERSED STEPS**. You can choose whether or not you want to see steps that have been completed and are no longer active.

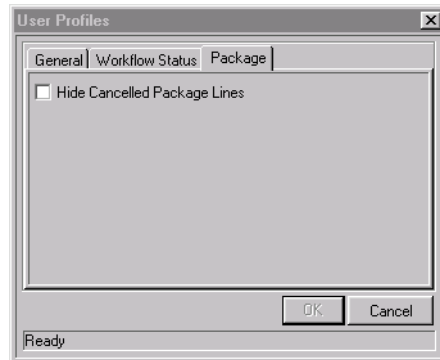
- **HIDE IMMEDIATE AND CONDITION STEPS NOT IN PROGRESS.** Since you typically cannot act on immediate Execution or Condition steps, you can choose to hide these steps.

The display of Workflow Steps will change according to your choice.

Hiding Cancelled Package Lines

You can configure the display of your Package in the **PACKAGE LINES** tab and the **STATUS** tab by changing your **USER PROFILES**.

1. Select **EDIT -> USER PROFILES**.
2. Click the **PACKAGE** tab to display the **USER PROFILES** window.



3. Select whether or not to display cancelled Package lines by selecting the **HIDE CANCELLED PACKAGE LINES**.

If you check the **HIDE CANCELLED PACKAGE LINES** check box, the ordering of the remaining Package Lines and their respective sequence numbers remain the same. Also, reordering the visible lines will not affect the hidden (cancelled) lines. The sequence numbers of the visible lines being reordered will swap correspondingly.

Chapter 6

Kintana Deliver Reports

Kintana Deliver features a pre-defined set of HTML-based reports that are accessed through a Web browser. The reports provided with Kintana Deliver allow users to view the current detailed status of their Kintana data at any point in time. Kintana's Decision Support System (DSS) reports provide users with a high level overview of their initiatives through graphical summary reports. Kintana Deliver also allows users to build their own reports.

This chapter describes the procedures used to submit and view reports in Kintana Deliver using both the Kintana Workbench and Kintana's HTML interface. The following topics are discussed:

- *“Kintana Reports Overview”* on page 121
- *“Processing Kintana Reports”* on page 128

Kintana Reports Overview

Kintana features two types of reports: standard reports and Decision Support System (DSS) reports. Kintana's standard reports output text that provides information on your specific entities or configurations. Kintana's DSS reports feature a graphical data display which helps evaluate key system and process performance. The following sections discuss each type of Kintana report and list the reports commonly used in Kintana Deliver:

- *Standard Reports*
- *Decision Support System (DSS) Reports*

Standard Reports

The standard reports that ship with Kintana Deliver and a brief description are listed in the following table. These reports can be accessed through both the Kintana Workbench and the HTML interface. A complete list of Kintana Reports, including details for parameters in each report, are in "[Kintana Reports](#)".



Note

The following table lists all standard Report Types that have a product scope of **KINTANA DELIVER** or **ALL PRODUCTS**.

Table 6-1. Standard Kintana Deliver Reports (Non-DSS)

Report	Description
Compare Custom Database Setup Report	Runs custom Kintana database comparisons for the comparison of actual data within a database as well as within the data model.
Compare Filesystem Environments Report	Compares the files and file structure of two machines.
Compare MS SQL Server 7 Environments Report	Compares the data models of two SQL Server Version 7 databases.
Compare Oracle Environments Report	Compares the data models of two Oracle schema.
Distribution Detail Report	A Release Management report used to list the contents and results of a Distribution.
Environment Comparison by Objects Migrated Report	Looks at the history of all the objects migrated using Kintana Deliver into each environment and lists any differences.
Environment Comparison Report	A System Administration report that audits Environment setup.
Environment Detail Report	A System Administration report that lists the detailed setup of a given Environment or group of Environments.
Environment Group Detail Report	Contains detailed information from the specified Environment Groups.
Environments/Objects Detail Report	Lists objects that have been migrated into a given Environment or sets of Environments grouping the report output by Environment name; an 'Object inventory' for newly migrated objects.
Lookup Types Report	View the configuration details of one or more lookups.
Notification History Report	A Workflow report that lets you view notifications that have been sent or are pending.
Object Type Detail Report	A System Administration report used to audit the setup of an Object Type or a group of Object Types.

Report	Description
Object History Report	Provides a Workflow Step transaction history for your Packages. It lists all the transactions matching your selection criteria.
Objects/Environments Detail Report	Lists objects that have been migrated into a given Environment or a set of Environments, grouping the report output by Object Type name.
Package Details Report	Use this report for auditing individual Packages. Based on the selection criteria, this report lists individual Packages and detailed information regarding each Package.
Package History Report	Audits the transaction history of individual Packages and lists the complete Workflow history for each selected Package.
Package Impact Analysis Report	Analyzes the impact of a given Package based on the audit history stored in the Kintana Product Suite.
Packages Pending Report	A worklist of Packages pending user action. Based on your selection criteria, this report lists open Packages with pending activity.
Portlet Detail Report	Returns the definitions of selected Portlets, including columns, filter fields, access security, 'used by,' and the Portlets' full SQL query.
RCS Check In Report	(If you use an RCS file management system) Checks a file into the RCS repository.
RCS Check Out Report	(If you use RCS file management system) Checks a file out of the RCS repository.
Release Detail Report	A Management report used to list the contents of a Release.
Release Notes Report	A Release Management Report that shows all of the Requests and Packages in a Release as well as their associations.
Report Type Detail Report	The parameters and parameter details for each Report Type, as well as the exact commands used to run the report.
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 Kintana Package Interface Report	Validates and loads Package data from the Deliver open interface tables into the standard Deliver data model.
Run Kintana User Interface Report	Imports data from the user interface tables or an LDAP server.
Run License Usage report	View current License usages.
Run Workflow Transaction Interface Report	Validates and runs Workflow transactions based on data in the Workflow open interface tables. Used to kick-off process steps from outside the Kintana end-user screens
Security Group Detail Report	Lists the setup information for one or more Security Groups.

Report	Description
Special Command Detail Report	This report lists details for a special command or a range of special commands.
Synchronize Meta Layer Report	Assesses or synchronizes the Meta Layer.
User Data Detail Report	Reports on the definition of each custom field.
User Detail Report	Lists the users defined in your Kintana system as well as the Security Groups attached to each user.
Validation Report	A System Administration report on the various custom Validations that your System Administrator has entered into the system or which come standard with the Kintana Product Suite.
VC - Check In	Check a file into Version Control.
VC - Check Out	Check a file out of Version Control.
VC - Diff Report	Reporting the differenced between two files in the RCS repository.
VC - Employee History Report	History of the employee specified (i.e. what files the employee has touched).
VC - File Report	History or status of the file specified.
VC - Lock Break	Breaks a lock on a file.
VC - Locked Files report	List of all locked files.
Workflow Detail Report	Use this report to view the complete definition of a specific Workflow or a set of Workflows.
Workflow Statistics Report	Uses a given date range and a Workflow (or a range of Workflows) to provide statistical information regarding the usage of the Workflow.



All Report Types that end with 'Report' are textual reports that list details about specific entities. Report Types that end with 'Program' perform some activity and then report on their results.

Decision Support System (DSS) Reports

Kintana's Decision Support System is a powerful extension to Kintana Deliver that provides enhanced capabilities for data analysis. The DSS Module provides valuable information on several types of metrics and Key Performance Indicators (KPIs) that organizations use to make more informed IT decisions. Examples of the data analysis capabilities include:

- **Bottleneck Reporting:** Identify steps within a Workflow that require the most attention due to an imbalance in resources responsible for that activity or operational inefficiencies. View aging information to see the average time a Package has been pending some form of action.
- **Cycle-Time Reporting:** Measure Service Level Agreements and evaluate if new procedures have had an impact over time.
- **Throughput Reporting:** Measure the volume of Packages over a period of time, and categorize them to determine where most of your organization's time and effort has been spent.
- **Trend & Exception Reporting:** Quickly identify trends and exceptions in summarized reports that are based on the transactional data captured by Kintana Deliver.

Key features of the Decision Support System include:

- Real time graphical reporting in a Web-based interface
- Access to the summarized and detailed data behind each graphical report
- Exporting data in a textual format that can be easily imported into Microsoft Excel

Understanding the Reports

Every DSS report provides a graphical summary of Package transaction-level data. Many reports display data over a specified time range in buckets of time (weeks, months or years). Others display information by Workflow or Environment. Report parameters can be specified to further refine the data retrieved by the reports.

Graphical Data Representation

Each DSS report provides a graphical representation of the data included in the report. Graphical representations provide several benefits over data presented only in a text-only format.

- Trends in the data are more easily identified
- Exceptions in the data can be quickly identified
- Data can be summarized concisely and more easily interpreted

An example of graphical report output is shown in *Figure 6-1*.

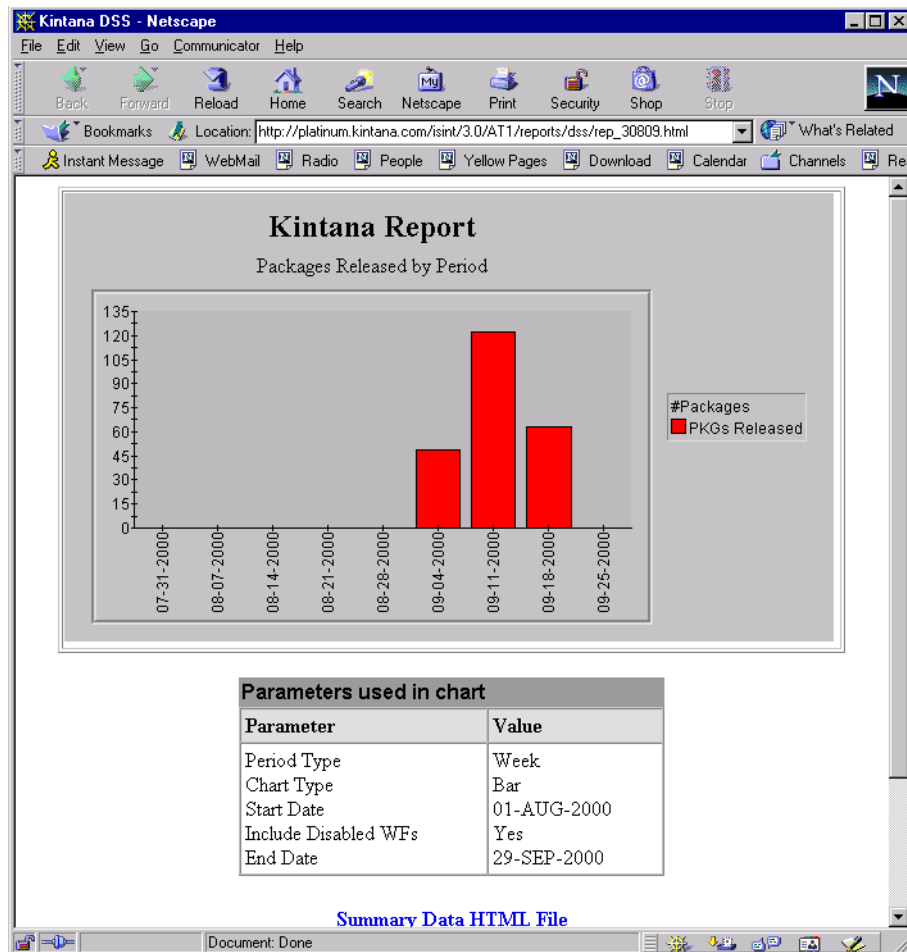


Figure 6-1 Sample DSS Report Output

Textual Data

All the data returned in the DSS report is also presented at the bottom of the report in a table format. Tables allow a granular look at the data returned for a particular report. A link to a text file containing this data is also included with the report, which allows users to download a file that can easily be imported into Microsoft Excel or any other application for further analysis. All the parameters used when submitting the report are also displayed.

DSS Reports in Kintana Deliver

The DSS reports that ship with Kintana Deliver are listed in the following table. These reports can be accessed through both the Kintana Workbench and the HTML interface. For details on each report, refer to "[Kintana Reports](#)".

Table 6-2. Kintana Deliver DSS Reports

DSS Reports	Description
Average Package Cycle Time by Workflow	Measures the average time a Package takes to complete a Workflow process.
Completed Package Lines Summary	Gives the number of Package Lines that have been completed. Package Lines are grouped based on Object Type, Project, Package Type or Workflow.
Migrations Submitted by Period	Shows the number of objects that were submitted for migration during a specified time period.
Object Migrations Summary	Lets you view the number of object migrations performed. This report is grouped by Object Type, destination Environment or Workflow.
Objects Migrated by Period	Results from this report indicate the number of objects that were actually migrated during the specified time period, with results reported by the specified time unit.
Package Cycle Time Distribution	Displays the distribution of Package cycle times in user-specified time buckets.
Package Line Status Detail	Lets you view the number of Packages passing through a given Package status for a particular Workflow over a given time period.
Packages Completed by Period	Lets you view the number of Packages that have been completed per time unit (week, month or year) over a specified time span.
Packages Submitted by Period	Lets you view the number of Packages that have been generated during a particular time period.
Packages Submitted/Closed by Period	Tracks Packages that are Released by Period and Closed by Period. If the status is submitted and closed, that issue only tracks as closed.
Pending Package Line Aging	Lists the average number of days that a Package remained at a particular Workflow Step before being acted on and the number of Packages that passed through each status during the specified time period.
Pending Package Lines	Lists the number of Package lines currently requiring action for a given Workflow step.
Pending Package Lines by Security Group	Indicates the number of Package Lines pending for each Security Group and whether those pending Packages are exclusive to that group, or whether they are eligible to be acted on by another Security Group as well
Pending Package Lines by Workflow Step	Lets you see the number of Package Lines currently at each of the Workflow statuses.
Pending Packages by Workflow	Gives a high level view of the number of Packages in process in a given Workflow at the current time.

Processing Kintana Reports

Kintana reports can be run either from the Kintana Workbench or the Kintana HTML interface. Similarly, previously run reports can be viewed from either interface. The following sections provide instructions for processing and viewing Kintana reports:

- [Submitting a Report from the Kintana Workbench](#)
- [Submitting a Report from the HTML Interface](#)
- [Viewing Previously Submitted Reports](#)

Submitting a Report from the Kintana Workbench

To submit a report from the Kintana Workbench:

1. Click the **DELIVER** shortcut and click the **REPORTS** (or **DSS REPORTS**) icon to open the **REPORT SUBMISSION WORKBENCH**.
2. Click **NEW REPORT**. The **NEW REPORT SUBMISSION** window opens.
3. Select the type of report to submit from the **REPORT TYPE** auto-complete list.

After selecting the Report Type, report-specific parameters appear in the **PARAMETERS** tab of the **NEW REPORT SUBMISSION** window.



Note

You may not have access to all Report Types. If you need access to a Report Type, but do not see it listed, contact your administrator for permission.

4. Fill in all the required parameters (as indicated by the red field label) and any optional parameters for the report.
5. Set up the schedule for running the report:
 - a. Click the **SCHEDULING** tab and specify when the report is to be run. If no scheduling information is entered, the report runs immediately.
 - b. Enter the frequency with which the report should be re-run.
6. Set up the Notification:
 - a. Click the **NOTIFICATIONS** tab.
 - b. Click **NEW**.

- c. Select any users who should be informed of the report results.
 - d. Click **OK** to close the ADD NOTIFICATION FOR REPORT SUBMISSION window.
7. Click **SUBMIT** to run the report.
 8. Click **VIEW REPORT** to view the results in your Web browser.
 9. If the report fails, click **VIEW LOG** to view the technical details of the report execution.

Submitting a Report from the HTML Interface

Kintana Deliver reports can be run from Kintana's HTML interface. To run a report from the Kintana HTML interface:

1. Logon to KINTANA.
2. From the Kintana menu bar, select **REPORTS > PACKAGE REPORTS**. The AVAILABLE REPORTS page opens.

The screenshot shows the Kintana HTML interface. On the left, a navigation menu is visible with a red arrow pointing to the 'Package Reports' option under the 'Reports' section. The main content area is titled 'Available Reports' and contains two sections: 'Reports' and 'DSS Reports'. Each section lists various reports with brief descriptions.

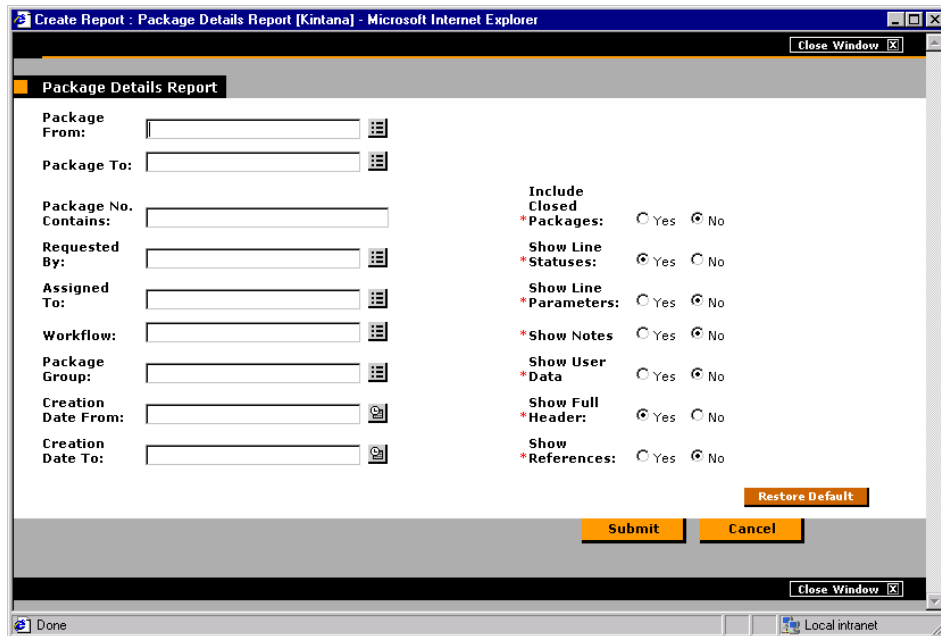
Reports

- (REFERENCE) Run Kintana Organization Unit Interface** Imports data from the organization unit interface tables or an LDAP server.
- Compare Custom Database Setup** Compare custom aspects of two databases (either SQL Server or Oracle). With this report it is possible to compare actual data as well as object definitions.
- Compare Oracle Environments** Compare the data model (tables, indexes...) and database objects (packages, views, triggers...) of two Oracle schemas. Reports either all objects or differences only.
- Environment Comparison by Objects Migrated Report** Compare the migration history of multiple Kintana environments. Lists objects that were migrated into one specified environment but not the other, and can also flag objects migrated into both environments but at different times.
- Environments / Objects Detail Report** Track migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by environment.
- Notification History Report** View Notifications that have been sent or are pending
- Object History Report** Track the movement of specific types of objects through your processes. Lists all executions for a given object type and date range.
- Objects / Environments Detail Report** Track migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by object type.
- Package Details Report** Audit the details of one or more packages. Includes header information, notes, and line details for each selected package.
- Package History Report** Audit the transaction history of one or more packages. Details the complete workflow history for each package line, showing every status change (date, time, user responsible) for every step traversed.
- Packages Pending Report** Generate a worklist of packages pending user action. Lists key details about open packages with pending activity, facilitating work prioritization, monitoring, and quick action decisions.
- Run Kintana User Interface** Imports data from the user interface tables or an LDAP server.

DSS Reports

- Average Package Cycle Time by Workflow (DSS)** DSS - Chart the average time a package takes to complete a workflow process.
- Completed Package Lines Summary (DSS)** DSS - Summarize the number of package lines that have been completed. Results can be grouped by object type, package group, package type, or workflow.
- Migrations Submitted by Period (DSS)** DSS - Chart the number of objects submitted per time unit (week, month, or year) over a specified time span. Helps to identify time trends in migration volume.
- Object Migrations Summary (DSS)** DSS - Summarize the number of object migrations performed, filtered and grouped by object type, destination environment, or workflow. Provides overall software change activity metrics.
- Objects Migrated by Period (DSS)** DSS - Chart the number of objects successfully migrated per time unit (week, month, or year) over a specified time span. Helps to identify overall throughput and longer-term time trends in activity.
- Package Cycle Time Distribution (DSS)** DSS - Chart a distribution of package cycle times in user-specified time buckets (specified in days). Complements the 'Average Package Cycle Time by Workflow' report, and is helpful for identifying aberrant data.

3. Choose the report to be submitted from the list of Report Types by clicking on its name. Both Regular reports and DSS reports are available in separate sections of the Reports page. The report's creation page opens.



This example of a Report page shows the required and optional fields for the PACKAGE DETAILS REPORT. Each Report Type has its own set of required and optional fields. The Report creation page always displays a different set of fields depending on which Report Type is selected.

4. Enter information in the Report creation page's required fields.
5. (Optional) Enter information in the Report creation page's optional fields.
6. Click **SUBMIT**.

The REPORT SUBMITTED page opens. The report's output is displayed in a separate page.

Viewing Previously Submitted Reports

You can view previously submitted reports from both of Kintana's interfaces. The following sections provide instructions for:

- [Viewing Reports from the Kintana Workbench](#)
- [Viewing Reports from the HTML Interface](#)

Note

You may not have permission to view all reports. If that is the case, contact your System Administrator to get permission for reports that are restricted by Security Groups. You may also not have access to any reports that are restricted to Creator only.

Viewing Reports from the Kintana Workbench

To view previously submitted reports:

1. Enter search criteria in the **QUERY** tab of the REPORTS WORKBENCH.
2. Click **SEARCH**. All matching report submissions are listed in the **RESULTS** tab.
3. Click **OPEN** to view the criteria used for the report.
4. Click **VIEW REPORT** to view the report output.

Note

It is not possible to modify the values used for a previous report submission. However, it is possible to select a particular report submission on the **RESULTS** tab of the REPORT SUBMISSIONS WORKBENCH and click **COPY**. This makes an exact duplicate of the report submission. The duplicate report submission can be modified and submitted.

Viewing Reports from the HTML Interface

To view a previously submitted report from the Kintana HTML interface:

1. Logon to the KINTANA HOME page.
2. Select **SEARCH > REPORTS**. The REPORT SEARCH page opens.

Sign Out

Report Search

Search Information Search Cancel

Report #:

Requested By:

Report Type:

DSS: Yes No

Submission Date From: To:

Clear Fields

Result Display Options

*Maximum Reports Displayed:

Search Cancel

3. In the **SEARCH INFORMATION** section, enter search criteria in the appropriate fields. None of the fields are required.
4. Under **RESULT DISPLAY OPTIONS**, enter the maximum number of results to be displayed.
5. Click **SEARCH**.

The **REPORT SEARCH RESULTS** page opens. The page displays summary information about any reports that match your search criteria.

6. Click the Report Number under the **REPORT #** column to see the output details of any report.

Appendix

A

Users and Licensing

The following sections explain the different License types for each Kintana product. Also discussed are the user roles and responsibilities each License is meant to suit, and the functionality they grant.

- *Power and Standard Licenses*
- *Kintana Drive Licenses and User Roles*
- *Kintana Create Licenses and User Roles*
- *Kintana Deliver Licenses and User Roles*
- *Kintana Dashboard Licenses and User Roles*
- *Kintana Solution Licenses*
- *Kintana Accelerator Licenses*

Power and Standard Licenses

Each user must have a Kintana license to log onto Kintana. Kintana features two License types: Standard and Power. Each License type is meant to suit different business needs and responsibilities, and therefore grants a different set of functionality.

The Power License provides access to all product features through both the Kintana Workbench and the standard Kintana HTML interface, accessible through any Web browser. The Standard License provides access to product features only through Kintana's HTML interface and the Kintana Dashboard.

Power Licenses implicitly provide a user with access to all product features available to a Standard License user, as well as the use of the Kintana Workbench. For example, a user with a Drive Power License does not require

an additional Standard License to perform the tasks associated with Standard Licenses; for example, updating Tasks in the HTML interface.



Note

Kintana users' access to screens and functions in Kintana are controlled by a combination of License and Access Grants. The following sections discuss only the licenses required to perform specific actions. For additional details on Access Grants which are also required, refer to the Access Grant documentation in the "[Kintana Security Model](#)".

Kintana Drive Licenses and User Roles

A Drive Power License provides advanced product features for:

- Project Managers who creates, plans, and monitors Projects.
- Project Managers who create and configure Project Templates.
- Kintana Administrators who configure and administer the Kintana application -- setting up users, assigning security, and configuring Report Types.

A Drive Standard License provides access to routine product features for:

- Project Participants who execute Project Tasks -- updating Tasks as Completed, adding Notes, attaching documents, etc.
- Project Managers who only select and run reports.
- Project Managers who monitor Project status without editing Projects.

The following tables detail the business roles best suited to each Drive License, along with their associated tasks and functionality.

Table A-1. Kintana Drive Power License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
Project Managers Project Leads Program Managers	Creating, planning, and monitoring projects. Updating tasks. Assigning resources Setting start and end dates. Setting task dependencies. Running project reports. Configuring Project Templates.	Access to Workbench and HTML interface including Dashboard. Configuring report types and validations. Setting up users and security. Configuring Project Templates. Creating/Updating Projects -- adding/removing Tasks, dependencies, Subprojects. Deleting/Canceling Projects.
Kintana Administrators	Setting up users. Assigning security groups. Configuring report types.	Modifying all standard and custom Project/Task information -- Resource assignments, Effort, Confidence, etc. Adding/removing References including Packages, Requests, other Projects, attachments. Advanced querying. Running, scheduling, and configuring reports. All capabilities listed for Standard license. Create a Budget Create a Staffing Profiles/Resource Pools

Table A-2. Kintana Drive Standard License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
Task Owners Project Participants	Updating Tasks as complete. Attaching References. Completing Project-Manager-requested fields for Tasks. Updating Notes. Running reports.	Access to Kintana HTML interface and Dashboard. Querying and viewing existing Projects and Tasks. Adding Notes. Updating Project-Manager-requested fields for Tasks.
Upper-Level Managers Other Stakeholders	Viewing Project status. Running reports.	Adding/Updating/Deleting Action Items. Adding References -- documents, URLs, Requests, other Projects. Running reports.

Kintana Create Licenses and User Roles

A Create Power License provides advanced product features for:

- Users who are assigned Requests and are actively involved in resolving them.
- Users who manage the prioritization, assignment, and resolution of Requests.
- Kintana configuration experts who configure and administer the Kintana application -- setting up users, assigning security, and creating Request Types, Workflow and Report Types.

A Create Standard License provides access to routine product features for a user who

- Requestors who submit, monitor, and sign off on their own Requests.
- Upper-Level Managers who run reports and provide approvals.



Note

An additional access grant (CREATE: ALLOW REQUEST FIELD UPDATES) can be assigned to the user. This access grant allows users to view and update any Request, regardless of whether or not they are its creator or Contact.

The following table details the business roles best suited to each Create License, along with their associated tasks and functionality.

Table A-3. Kintana Create Power License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
Analysts Help Desk Staff Managers Project Leaders Project Team	Assigning and prioritizing Requests. Updating Request information. Moving Requests through the workflow. Running reports.	Access to Workbench and HTML interface including Dashboard. Direct updating of Request fields when not creator or contact of Request. Configuring workflows, report types, and validations. Setting up users and security.
Kintana Administrators	Configuring workflows and Request Types. Setting up users. Assigning security groups. Configuring report types.	Configuring Request Types and Request Header Types. Re-opening, deleting, and canceling Requests. Scheduling and acting on eligible "execution" workflow steps. Adding/Removing References including Projects, Requests, and Packages. Running, scheduling, and configuring reports. Advanced querying. All capabilities listed for Standard license. Perform Batch Request Updates

Table A-4. Kintana Create Standard License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
Requestors Request Contacts	Submitting Requests. Monitoring the status of their own Requests. Providing user sign-off. ** Monitoring and updating all Requests	Access to HTML interface and Dashboard. Creating new Requests. Searching for existing Requests. Adding Notes and References including documents and URLs. Acting on eligible "decision" workflow steps.
Upper-Level Managers	Running reports. Providing approvals. ** Monitoring and updating all Requests	Updating Request Header and Detail fields through workflow step transactions. Direct updating of Request Header and Detail fields provided user is either Request creator or contact, or is in the "Assigned to" group. Running reports. ** Direct updating of fields in any Request regardless of whether user is Request creator or contact.

Kintana Deliver Licenses and User Roles

A Deliver Power License provides advanced product features for:

- Developers who create Packages for deployment.
- Technical Managers or other staff who are actively involved in managing or executing deployments and releases.
- Kintana configuration experts who configure and administer the Kintana application -- setting up users, assigning security, and creating Object Types, Workflows and Environments.

A Deliver Standard License provides access to routine product features for:

- IT Managers who only need to make deployment approvals.
- QA or Business Analysts who need to make approvals in the deployment process.

The following table details the business roles best suited to each Deliver License, along with their associated tasks and functionality.

Table A-5. Kintana Deliver Power License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
Developers	<p>Creating and updating Packages for deployment.</p> <p>Monitoring Package status.</p> <p>Running reports.</p>	<p>Access to Workbench and HTML interface including Dashboard.</p> <p>Configuring workflows, report types, and validations.</p>
DBAs System Administrators Config Managers Technical Project Leads Release Managers	<p>Creating Packages.</p> <p>Updating Package information.</p> <p>Making approvals.</p> <p>Scheduling and executing migrations.</p> <p>Creating and managing deployment releases.</p> <p>Assigning Packages to developers.</p> <p>Configuring Object Types, workflows, and environments.</p> <p>Running reports.</p>	<p>Setting up users and security.</p> <p>Configuring and maintaining environments and Object Types.</p> <p>Creating, updating, deleting, and canceling Packages.</p> <p>Acting on and schedule eligible “execution” workflow steps.</p> <p>Adding/Removing Package References including Projects and Requests.</p> <p>Advanced querying.</p> <p>Scheduling, running, and configuring reports.</p> <p>Refreshing environments.</p>
Kintana Administrators	<p>Configuring Object Types, workflows, and environments.</p> <p>Setting up users.</p> <p>Assigning security groups.</p> <p>Configuring report types.</p>	<p>Creating and managing Releases.</p> <p>Creating and executing Release distributions.</p> <p>All capabilities listed for Standard license.</p>

Table A-6. Kintana Deliver Standard License - Roles and Functionality

Business Role	Tasks Associated with Role	Product Capabilities
IT Managers QA Analysts Business Analysts	<p>Viewing Package status.</p> <p>Making approvals for cases (QA Completed, Stakeholder Analysis Complete, etc.) when modeled in Kintana Deliver workflows.</p> <p>Running reports.</p>	<p>Access to HTML interface and Dashboard.</p> <p>Querying and viewing existing Packages.</p> <p>Adding Notes and Package References including document attachments and URLs.</p> <p>Acting on eligible “decision” workflow steps.</p> <p>Running reports.</p>

Kintana Dashboard Licenses and User Roles

A Kintana Dashboard Power License provides advanced product features for:

- Configuring the Default Kintana Dashboard.
- Setting Portlet access in the Portlet Workbench.
- Creating custom portlets using the Portlet Workbench.
- Kintana Administrators who configure and administer the Kintana application -- setting up users, assigning security, etc.

A Kintana Dashboard Standard License provides access to routine product features for:

- Adding portlets to the Dashboard.
- Personalizing Dashboard pages and Portlets.



Note

The Kintana Dashboard provides convenient visibility into your Kintana data. Other licenses (Kintana Create, Kintana Deliver, Kintana Drive) are required for capturing and processing critical business data. Use the Dashboard licenses in conjunction with other licenses to get the most flexible Kintana experience.

The following table details the business roles best suited to each Kintana Dashboard License, along with their associated tasks and functionality.

Table A-7. Kintana Dashboard Power License - Roles and Functionality

Business Roles	Product Capabilities
Kintana Application Configuration Experts	Access to Workbench and HTML interface. Setting up users and security. Building custom Portlets. Configuring the Default Dashboard. Running, scheduling, and configuring reports. All capabilities listed for Standard license.

Table A-8. Kintana Dashboard Standard License - Roles and Functionality

Business Roles	Product Capabilities
Kintana Standard Users	Access to HTML interface and Dashboard. View Kintana data by adding and personalizing portlets to the Kintana Dashboard.

Kintana Solution Licenses

If you have purchased licenses for a Kintana Solution, you can assign licenses to users. The following sections discuss the licenses available for each Kintana Solution:

- *Demand Management*
- *PMO*
- *Time Management*

Demand Management

The Kintana Solution for Demand Management provides a single application and repository to capture all demand placed on IT. Kintana consolidates information from the many different sources so you can both view aggregate demand in real time and report against it. In addition, Kintana streamlines the end-to-end process (from demand through deployment) of fulfilling demand.

Table A-9. Demand Management Standard License - Roles and Functionality

Business Roles	Product Capabilities
CIO	Viewing Demand captured in Kintana
Demand Manager	Creating / Capturing Demand
Team / Group Manager	Analyzing Demand Scheduling, assigning and rejecting Demand

PMO

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

Table A-10. PMO Standard License - Roles and Functionality

Business Roles	Product Capabilities
Program Manager	Creating, editing and deleting Business Objectives.
Program Resource	Creating, defining and editing Programs. Submitting and managing Program Issues. Requesting Resources and managing resource requests. Submitting and managing Risks. Submitting and managing Scope Changes.

Time Management

The Kintana Time Management Solution allows you to budget time against bodies of work within the rest of Kintana, enter actual time worked for these bodies of work, and then review, approve, and report on these actuals.

Table A-11. Time Management Standard License - Roles and Functionality

Business Roles	Product Capabilities
Time Sheet Approvers	Creating, editing, deleting, and closing Work Allocations.
Resources Managers	Entering, releasing, reviewing and approving Time Sheets.

Kintana Accelerator Licenses

Kintana Accelerators are provided on a site-license basis (i.e. they do not have to be associated with individual users). Accelerator licenses enable additional

screens and fields in Kintana. See the documentation for the Accelerators installed at your site for details.

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