

KINTANA™
Processing Requests

Version 5.0.0

Publication Number: ProcessRequest-0603A

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Kintana Version 5.0.0

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Printed in USA

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Chapter
1**Introduction to Kintana Create**

Kintana Create allows an organization to model its request processes for managing technology initiatives from inception to implementation using a graphical workflow business modeler. Complex business rules can be modeled using approval methods, prioritization and delegation features that allow requests to efficiently advance through their specific workflow, routing them to relevant departments, groups or individuals. Kintana Create is designed to capture data by prompting users for Request and process-specific information, ensuring that required information is collected and validated at the appropriate time in the process.

For example, a request for a new feature to an eBusiness system could be routed for review and approval to the business manager responsible for the budget. The request could then be routed to the technology analysts responsible for implementing the enhancement. Users can monitor the status of the Request from their desktop using a Web browser. Email and pager notifications are generated as the Request passes through various stages of the process, keeping all project members informed. Throughout the process, users are prompted to enter additional information, appropriate to their specific task. Management reports and Dashboard views are also available to help monitor technology initiatives and service levels.

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

Kintana Create Features

The following key elements of Kintana Create allow you to efficiently and effectively manage your business processes:

- *Request Routing*
- *Easy Accessibility*
- *Increased Visibility*
- *Knowledgebase for Resolution and Reporting*
- *Integration with Kintana Deliver*
- *Integration with Kintana Drive*
- *Integration with the Kintana Dashboard*

Request Routing

Request routing is performed by a configurable Workflow engine. The Graphical Workflow Business Modeler (shown in *Figure 1-1*) is used by configuration experts at your site to model your Request resolution processes.

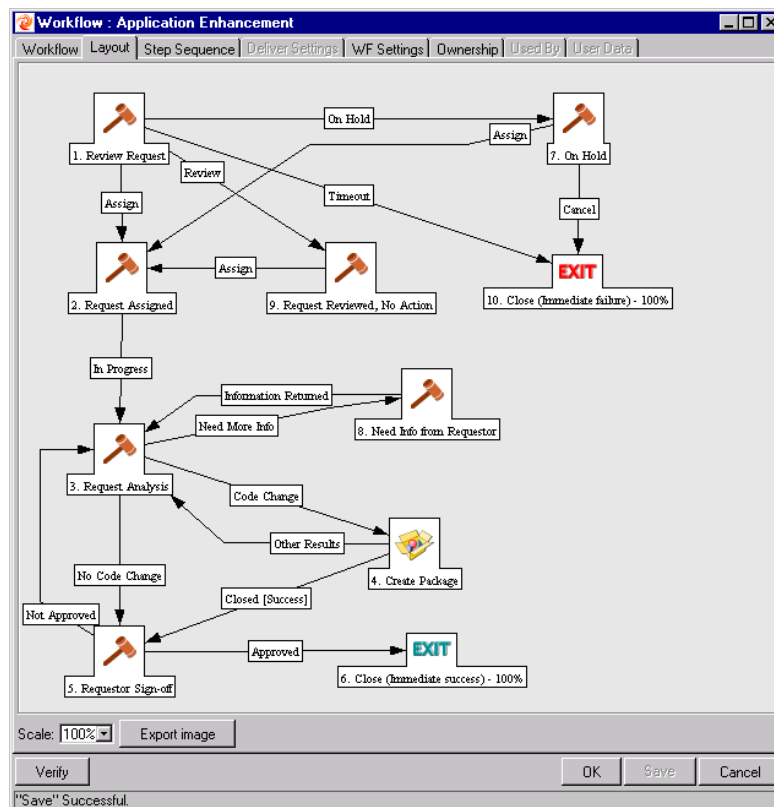


Figure 1-1 Graphical Workflow Business Modeler

Using rules defined by the Request Type, Requests are initially routed to an appropriate Workflow and an assigned party, either an individual or a group. The Workflow engine allows Requests to be routed to relevant departments, groups or individuals along with email or pager notifications.

For example, a ERP-ENHANCEMENT Request Type could be routed for review and approval to the business manager responsible for the budget, and then routed to the IS Analysts responsible for making the enhancement.

Kintana's Workflow allows you to layout a process using standard point-click and drag-and-drop procedures. Complex business rules can be modeled using the branching, voting, escalations and parallel execution features of the Workflow builder. Flexible approval methods, escalation, and delegation features allow you to efficiently advance a Request through a Workflow.

See "[Configuring a Request Resolution System](#)" for details on configuring Request Types.

Easy Accessibility

Built using 100% Pure Java technology, Kintana Create is accessible through any standard Web browser. Access to Kintana Create can be controlled at the user logon stage and through the Workflow security model. This restricts users from performing certain tasks and controls access to mission critical information.

Layouts for entering and updating Requests are customized, allowing users to optimize the user interface to match the company's needs.

Request progress is now easily and instantly accessed through the My Requests portlet in the Kintana HTML interface. This feature provides Request creators with a convenient point from which to check on their Requests.

Increased Visibility

Kintana Create allows users to view the exact status of a Request as it is processed through the system. As the request passes through the various stages in the workflow, email notifications are sent to relevant individuals informing them of the status of the Request. These notifications can easily be sent to email enabled devices such as pagers and mobile phones. Once the software is deployed to the final destination, the status of the Request is automatically updated and the Request can be closed.

Everyone on the notification list can see where the Request has been and where it is going, avoiding confusion regarding Request status.

Knowledgebase for Resolution and Reporting

A knowledgebase of past Requests helps to quickly resolve the new Requests reported. In addition, information about the different types of Requests reported and the resolution process for each of the Requests helps to analyze your staffing levels, Service Level Agreements, and bottlenecks.

Both text reports and graphical reports are available with Kintana Create. Additional reports can also be developed to meet the company's requirements. Reports can be scheduled to run periodically and automatically distributed to appropriate groups. Information can also be exported to a spreadsheet for further analysis.

Integration with Kintana Deliver

Kintana Create is tightly integrated with Kintana Deliver. This provides a closed-loop system for Requests that require software changes. Kintana Create Workflows can be configured so that at specific points in the Request resolution process, a Kintana Deliver Package is generated. This Package is used to process the actual deployment of the software change. Kintana Deliver interfaces with all major version control systems to retrieve files and automatically install them in the appropriate environment. Once the Package is completed, Kintana Deliver automatically updates the Kintana Create Request with its completion information. At that time, the Request continues with the rest of the resolution process. During the resolution process, users can drill down and find out the exact status of a reported Request. Email notifications can be sent as the Request passes through various stages in the Workflow in order to keep everyone informed.

Integration with Kintana Drive

Kintana Create is also tightly integrated with Kintana Drive. Kintana Drive Projects and Tasks can be linked to Requests through a variety of relationships. A Task can be configured to wait until a Request closes or to auto-update its % Complete based on the Request's progress. In addition, a Request can be configured not to close until a Task is complete. Tasks can also be created from Requests in the Kintana Workbench, allowing Requests to become Tasks in a Project with concrete target dates and deliverables.

Integration with the Kintana Dashboard

Kintana Create 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 request processes. As a complement to the HTML interface, the Kintana Dashboard seamlessly integrates with the core Kintana products in a way that allows for the delivery of real-time status and exception information on IT initiatives and operational activities.

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 buttons, tabs, menu items, and any system data selected from a drop down list or auto-complete list are shown in **BOLD SMALL CAPS** text.
- 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 interface 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 used in Kintana Create. An understanding of these concepts and terms is necessary when using the Kintana Create interfaces.

- *Requests*
- *Request Types*
- *Request Header Types*
- *Workflows*
- *Workflow Steps*
- *Request Status*
- *Dashboard*
- *Portlets*
- *References*
- *Displaying Kintana Data*

Requests

The Request is the fundamental work unit of Kintana Create. The Request window contains all of the information that is typically required to complete a specific business process. Requests with similar or related functions can be grouped into Request Categories, making them easier to locate and use.

The Request has an associated Request Type that determines which fields are included in the Request window. As the Request goes through its steps, you are prompted for all of the information necessary to bring the Request to closure.

Once the basic Request information has been entered, the corresponding Workflow is automatically selected based on the Request Type.



A Request:

- Is the fundamental “work unit” within Kintana Create.
- Is the repository for all of the information necessary to take a series of actions and move through a standard business process.
- Is a specific execution of a business process. Each Request is identified by a unique Request Number.

Create A Request > Create New Application Enhancement Sign Out

Create New Application Enhancement

Expand All Collapse All

Header Submit Cancel

Tab #1

Created By: jsmith

*Department: Manufacturing Sub-Type: []

*Workflow: Application Enhancement

Priority: High Application: Other

Assigned To: Assigned Group: [] *Contact Name: Ellis, Donald

Contact Phone: 444.444.4444

Request Group: [] Contact Email: dellis@unknown.com

*Description: Adding new Report functionality to the system.

Details

Enhancement

Module: Module A Difficulty: Medium

Modification Type: New Estimated Time to Complete: 11 days

Report Name: []

Program Name: []

*Justification: Addresses both internal and external (partner) needs.

Resolution: []

Duplicate ID: []

Resolution Summary: []

Notes

References Submit Cancel

Figure 2-1 Kintana Create Request

Request Types

A Request Type is a general category that defines the structure of a Request in Kintana Create. Kintana Create includes such pre-defined system Request Types as the BUG Request Type, ENHANCEMENT Request Type and PATCH Request Type. The fields that are used when a Request is created are customizable based on the Request Type. The base installation of Kintana Create is seeded with default Request Types and Request Header Types that can be modified to meet your business needs. Custom Request Types and custom Request Header Types can be copied from default configurations and modified or created from scratch. The Request Type is also used to determine the default Workflow through which a Request is routed, as well as the Request Category of the Request.



Definition

A Request Type:

- Is the framework that defines the behavior of a Request as it moves through a business process.
- Determines the logic behind (and provides the framework for) the storage and manipulation of data within a Request.
- Represents a different process within a business. The Request Type can be defined to capture different kinds of data and follow different business and resolution processes.

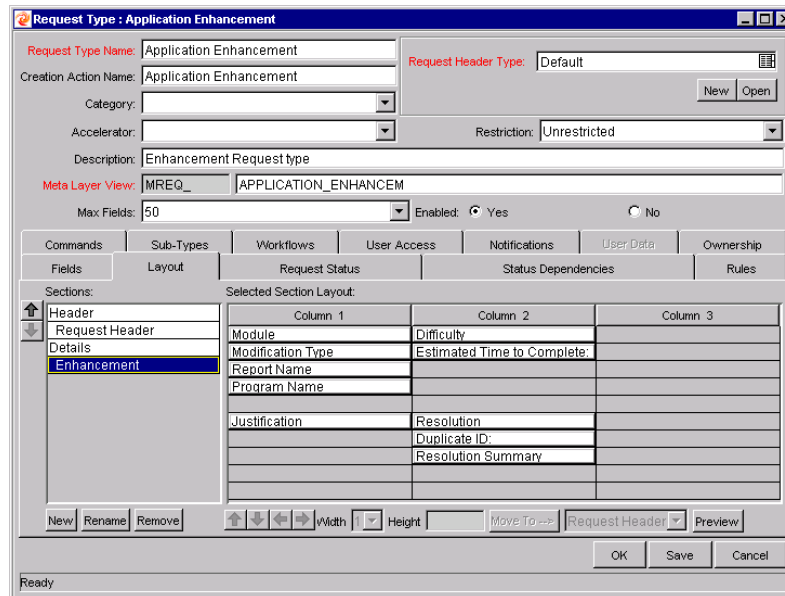


Figure 2-2 Kintana Create Request Type

Request Header Types

Request Header Types define the collection of fields that appear in the header region of the Requests using that Request Type. The presentation and validation of these Header Data fields in a Request Header Type depends upon the type of business process from which the Request Type is gathering information. When creating or configuring a new Request Type, you associate a Request Header Type with that Request Type.



Definition

Request Header Type

A Request Header Type can be thought of as a basic template for the header area that appears atop a Request. Request Header Types have the following characteristics:

- Provides a framework for the storage and manipulation of Request header data.
- Represents attributes common to multiple types of Requests. Header data is useful for locating and reporting certain types of Requests. Examples of Header Data are Creator, Assigned User, Description, Summary, and Department.
- Labels and arranges header fields in a manner most familiar to specific Business Units.

Prompt	Display	Display Only	Transaction Hist.	Notes Hist.
Request No.:	Y	Y	N	N
Request Type:	Y	N	N	N
Created By:	Y	Y	N	N
Department:	Y	N	N	N
Sub-Type:	Y	N	N	N
Created On:	Y	Y	N	N
Workflow:	Y	N	N	N
Request Status:	Y	Y	N	N
Priority:	Y	N	N	N
Application:	Y	N	N	N
Contact Name:	Y	N	N	N
Assigned To:	Y	N	N	N
Assigned Group:	Y	N	N	N
Contact Phone:	Y	N	N	N
Request Group:	Y	N	N	N
Contact Email:	Y	N	N	N

Figure 2-3 Request Header Type

Workflows

A Workflow is a logical series of steps that define the process that Requests follow. Workflow configurations and routings are configurable features of Kintana Create. The Workflow engine can handle virtually any business practice. This allows a department to create Workflows to automate existing processes, rather than forcing users to adopt a fixed set of processes to perform their work.

A sample workflow for an Application Enhancement is shown below:

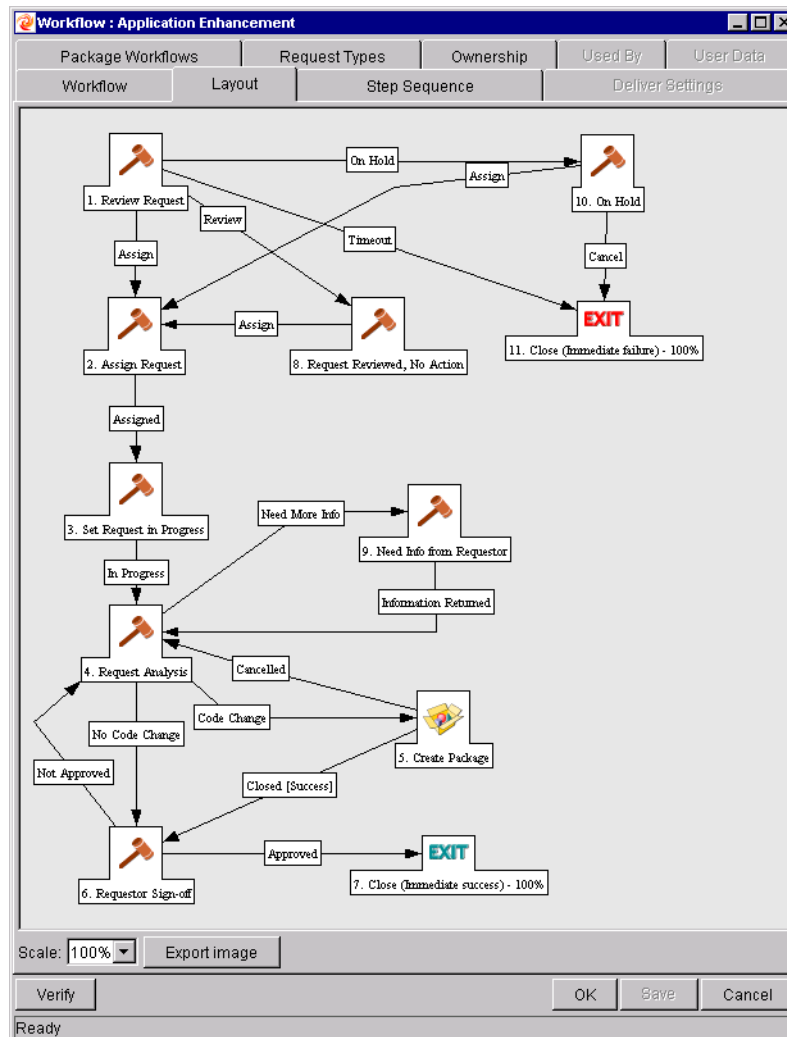


Figure 2-4 Visual Workflow

Workflow Steps

Workflow Steps are events that are linked together to form a complete Workflow. Kintana Create uses three types of Workflow Steps: Decisions, Executions and Conditions.

In a Decision step, a user or group of users needs to indicate an outcome, such as an approval of work or an indication that a review has been completed. For example, ‘REVIEW REQUEST’ is a Decision step.

In an Execution step, the Kintana system performs an action and then updates the step with the result. These actions can be as simple as calculating the value for a token or as complex as copying files, running programs and updating Web pages.

Conditions are logic steps used for complex Workflow processing, such as allowing the Workflow to proceed only when each of three different steps are completed.

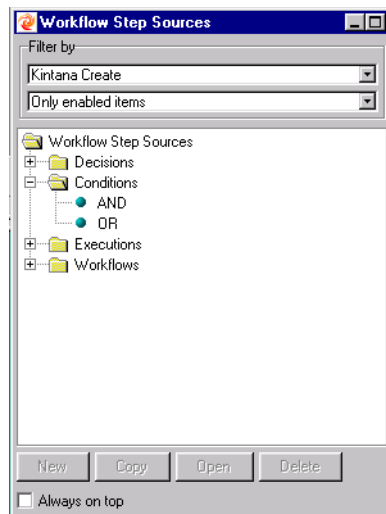


Figure 2-5 Workflow Steps

Request Status

A Request Status is a summary indicator of the current state of a Request. For example, a Request can have the Request Status 'NEW', 'ASSIGNED' or 'IN PROGRESS.' Request Statuses are automatically set as the Request moves through its Workflow.

Request Statuses are user-defined and attached to Request Types. Each Request Type can have different Request Statuses. For example, the Request Status 'REQUEST APPROVED' might be in an ENHANCEMENT Request Type but not in a BUG Request Type. Behavior can be defined for individual Request Statuses, such as requiring information in specific fields for Requests at specific Request Statuses.

Request Status can be viewed on the HEADER region of the REQUEST page, as shown in [Figure 2-6](#).

Application Enhancement - #30009

Description: Adding new Report functionality to the system.

Available Actions: Hide ▲ Request Status: **Assigned** (View Full Status Below)

Assign Request

In Progress

Expand All Collapse All

Header Save

Tab #1

Request No.: 30009 Request Type: Application Enhancement Change Created By: jsmith

Department: Manufacturing Sub-Type: Created On: May 21, 2003

Workflow: Application Enhancement Request Status: **Assigned**

Priority: High Application: Other Name: Dennis, Donald

Assigned To: Assigned Group: Contact Phone: 444.444.4444

Request Group: Contact Email: dellis@unknown.com

Description: Adding new Report functionality to the system.

Details

Enhancement

Notes

Status

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 21, 2003 03:29:32 PM PDT
2	Assign Request	Assign Request (View Available Actions)		May 21, 2003 03:29:34 PM PDT
3	Set Request in Progress			
4	Request Analysis			
5	Create Package			
6	Requestor Sign-off			
7	Close (Immediate success)			
8	Request Reviewed, No Action			
9	Need Info from Requestor			
10	On Hold			
11	Close (Immediate failure)			

Expand Steps Collapse Steps Graphical View Approval Details Transaction Details Cancel Request

Figure 2-6 Request Status on the Request Page

Dashboard

The Kintana Dashboard consists of a set of configurable, role-based visual displays called portlets that provide relevant summary information and highlight exception conditions. From these displays, users can drill down to any desired level of detail. The Dashboard displays the true status of initiatives and Requests, based on current data captured automatically as part of actually performing the work.

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, you 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.

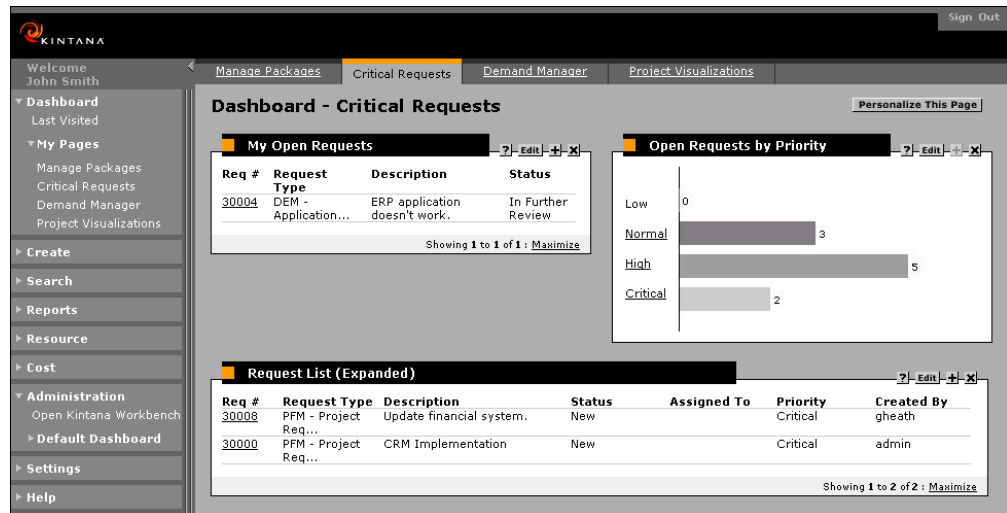


Figure 2-7 Kintana Dashboard

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 your Kintana Administrator to create custom portlets to suit your particular business needs.



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"*.

My Requests						
Req #	Req Type	Description	Status	Assigned To	Priority	Created By
87307	Application...	Updating existing business application.	Assigned		Normal	John Smith
87308	Application...	System performance needs to be improved.	New		High	John Smith
87309	Application...	Sale dependent on new functionality.	In Progress		Critical	John Smith
87310	Application...	Need functionality to manage software r...	New		Normal	John Smith

Showing 1 to 4 of 4: [Maximize](#)

Figure 2-8 Kintana Portlet

References

In addition to header and detail field information, Requests can have references to other entities or points of information. This allows for easy access and visibility to related data. Summary information for References is viewed as part of the Request. Each reference can be viewed in detail with a click of the mouse. There are several reference types defined in Kintana Create: Attachment, Package, Project, Release, Request, Task and URL.

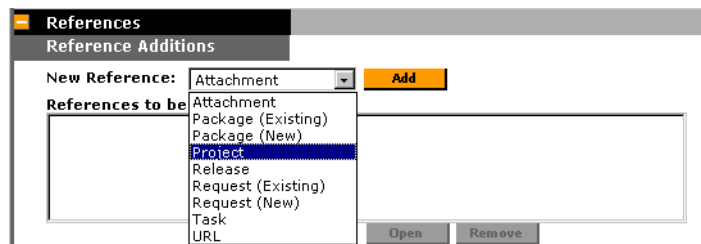


Figure 2-9 Request References

Attachments

It is possible to attach a file from your local machine to the current Request. The attached file is copied to the server and can then be accessed by other Kintana Create users. This feature is particularly helpful for referencing a document that is not already Web accessible.

Requests

You can add a reference to a Request to relate to another 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 Request and the new reference. See [“Adding References”](#) on page 34 for more details.

For Requests that were spawned from a step in the Request Workflow step, references to the Requests are automatically generated, establishing a two-way tie between the spawned Request and the original Request.

Packages

You can add a reference to an existing Package. For Requests that spawn Kintana Deliver Packages, references to the Package(s) are automatically created. This establishes a two-way tie between the Request and Package.

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 Request and the new reference. See [“Adding References”](#) on page 34 for more details.

Task

You can associate the current Request to a Kintana Drive Task using Kintana Drive. You can then set varying dependencies between the Request and the Task. Tasks can also be created from Requests in Kintana Drive. See [“Adding References”](#) on page 34 for more details.

Project

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

Documents (URL)

It is possible to reference an unlimited number of documents to a given Request. Documents need to be Web accessible and are referenced by simply entering the Web address (URL) of the document. Once attached, the documents can be opened by selecting the reference.

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 will see different sets of Request Types and 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 Create**

Kintana Create is a 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 creating and processing Requests and running reports.

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

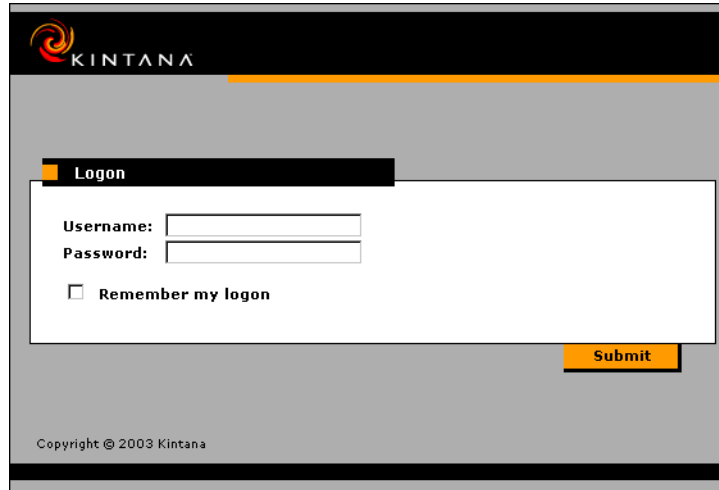
Kintana Create users will interact mostly with the standard Kintana interface. The following sections provide instructions for logging onto Kintana:

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

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.



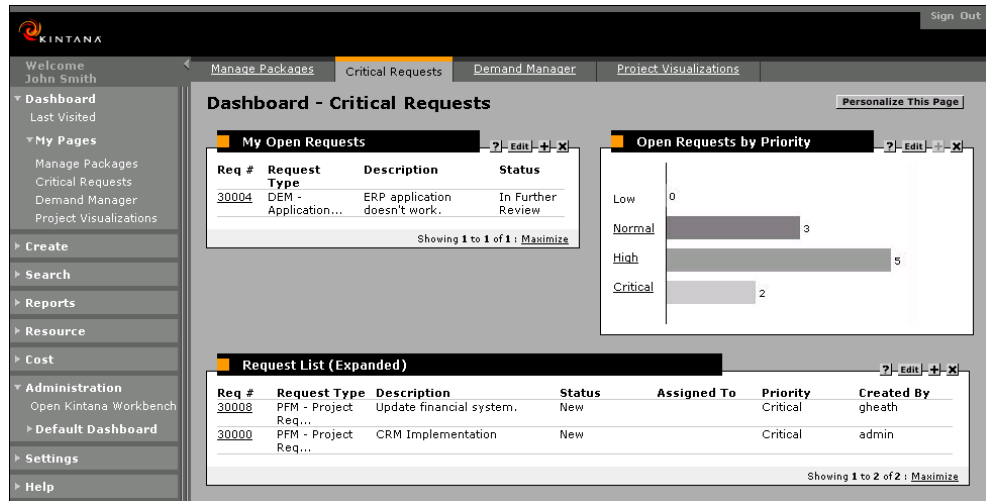
3. Enter your USERNAME and PASSWORD in the corresponding fields in the Kintana LOGON page. Contact your System Administrator to obtain your passwords and permissions.

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.

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.





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. Also, depending on how your user account was configured, you may be forced to change your password upon initial logon.

To change your password in Kintana:

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

The screenshot shows the Kintana user interface. On the left is a vertical menu bar with the Kintana logo at the top. The menu items include: Welcome John Smith, Dashboard, Create, Search, Reports, Resource, Resource, Cost, Cost, Demand, Team Manager, PMO, Time, Time, Administration, Settings (circled in red), Edit my Profile, View my Resource Information, and Help. The 'Settings' item is expanded, and 'Edit my Profile' is selected. The main content area is titled 'Edit My Profile' and contains two sections. The first section is 'Change Password', which has three input fields: 'Old Password:', 'New Password:', and 'Repeat New Password:'. The second section is 'Portlet Preferences', which has a single input field labeled 'Results in Maximized Portlets:' with the value '50' entered. A yellow 'Done' button is located in the bottom right corner of the main content area.

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.

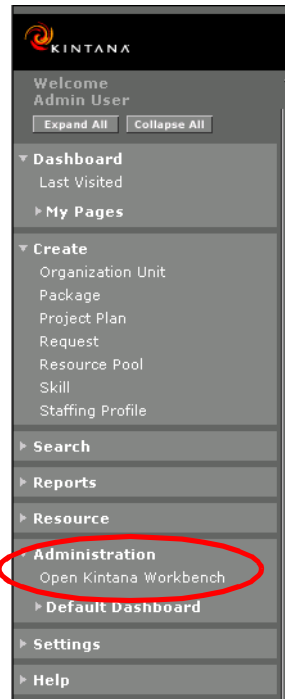
Launching the Kintana Workbench

The Kintana Workbench provides an interface accessing advanced processing and configuration functionality in Kintana. This interface is available to users with a product Power License.

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.

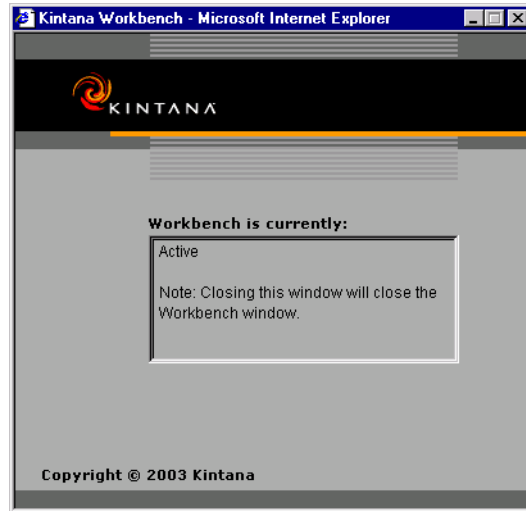
To launch the Workbench:

1. Logon to Kintana.
2. Select **ADMINISTRATION > OPEN KINTANA WORKBENCH** from the menu.



When the Workbench is accessed for the first time, several dialog boxes may appear asking permission to automatically install the Kintana Java client components. Answer “Yes” in all dialog boxes and follow any other instructions provided in the browser window. Depending on the client’s connection to the server, this may take several minutes. Subsequent logons will be much quicker, as the client does not have to install any additional components on their machine.

The following popup window opens to display the status of the Workbench. When the Workbench opens, the popup window indicates that the Workbench is active. This window must remain open to use the Workbench.



Note

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

Chapter 4

Creating a Request

Requests are the repositories for all of the information necessary to take a series of actions and move through a standard business process. As the fundamental work unit of Kintana Create, Requests are created and processed using the standard Kintana interface.

The following topics are discussed in greater detail below:

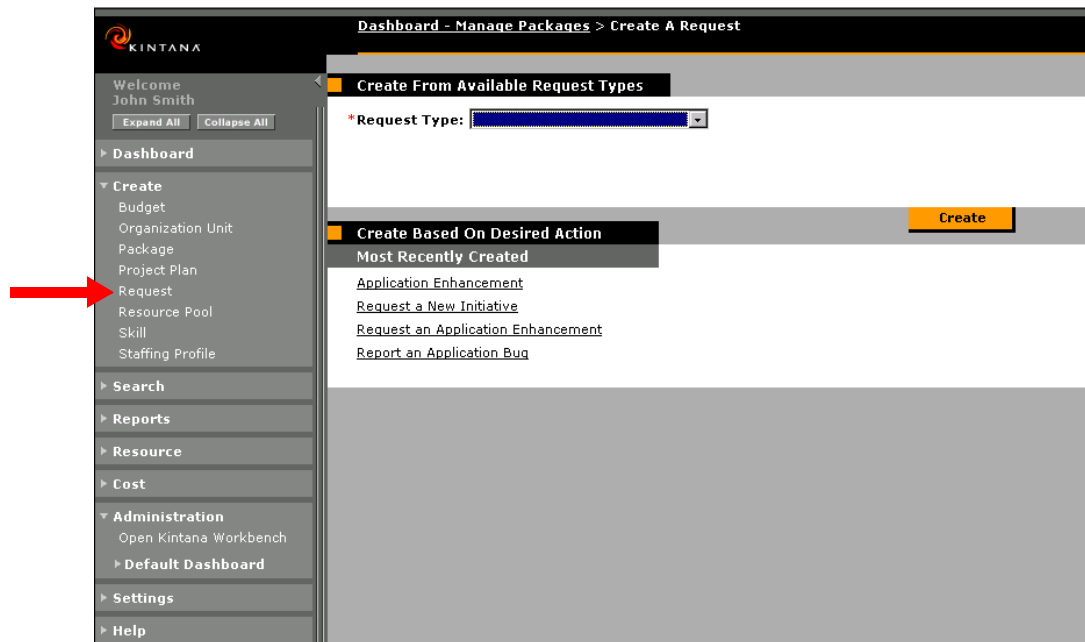
- [“Creating a Request”](#) on page 29
- [“Adding References”](#) on page 34
- [“Saving an Un-Submitted Request”](#) on page 48
- [“Adding and Editing Contacts”](#) on page 49

Creating a Request

Users create Requests every time a standard business process is invoked. The Request is given a unique number and is tracked from start to finish, ensuring task completion and accountability for all steps within the selected business process.

To create a new Request:

1. Logon to Kintana.
2. Select **CREATE > REQUEST** from the menu. The **CREATE NEW REQUEST** page opens.



3. Select the Request Type that you want to generate from the REQUEST TYPE drop down list in the CREATE FROM AVAILABLE REQUEST TYPES section. When you select a Request Type from the list, a description the Request Type is displayed below the field. To save time, the most recently created Request Types will be first on the list.

You can also create a Request by clicking on an action name in the CREATE BASED ON DESIRED ACTION section. Actions may be grouped by Kintana configuration personnel into useful categories for easier location.



When creating a Request, you may only see the Request Types that are most relevant to your business role or level of system access. See *“Displaying Kintana Data”* on page 22 for more detailed information.

4. Click **CREATE**. The CREATE NEW REQUEST page opens. The Header and Detail fields displayed will be different, depending on which Request Type you selected on the previous page.

The screenshot shows a web form titled "Create New Application Enhancement". At the top, there is a breadcrumb "Create A Request > Create New Application Enhancement" and a "Sign Out" link. The form is organized into several sections:

- Header:** Contains "Expand All" and "Collapse All" buttons, and "Submit" and "Cancel" buttons.
- Request Header:** Includes "Created By: jsmith", "* Department:" (dropdown), "Sub-Type:" (dropdown), "* Workflow:" (text input with value "Bug Request Type Workflow"), "Priority:" (dropdown), "Application:" (dropdown), "Assigned To:" (text input), "Request Group:" (text input), "* Description:" (text input), "* Contact Name:" (text input), "Contact Phone:" (text input), and "Contact Email:" (text input).
- Details:** Includes "Module" (dropdown), "Modification Type" (dropdown), "Report Name" (text input), "Program Name" (text input), and "* Justification" (text area).
- Enhancement:** Includes "Difficulty" (dropdown), "Estimated Time to Complete:" (text input), "Resolution" (dropdown), "Duplicate ID:" (text input), and "Resolution Summary" (text input).
- Notes:** A section with a "+" icon.
- References:** A section with a "+" icon.

"Submit" and "Cancel" buttons are located at the top right and bottom right of the form.

5. Enter Request detail information in the fields.
If you would like to make additional comments on the Request, enter them in the NOTES field. Required fields have a red asterisk next to them. All other fields are optional, but are often helpful when others are reviewing the open Request.
6. Add References to your Request.
In some cases, it may be useful to either reference a web accessible file, or attach a document or file from your local machine to the current Request. Additionally, you can reference other Kintana entities such as Packages, Tasks, or other Requests. For more information on adding references, see [“Adding References”](#) on page 34.
7. Click **SUBMIT** to save and submit the Request.
When all required Request fields have been filled, as well as any desired

additional fields, the Request is ready to be submitted for processing along its Workflow. This enters your new Request into the database and opens the REQUEST CREATION CONFIRMED page.

The screenshot displays a web interface for request management. At the top, there is a breadcrumb trail: "Create A Request > Create New Application Enhancement" and a "Sign Out" link. Below this, a section titled "Request Creation Confirmed" contains the text: "The following request has been created and submitted: Request #: 30010 Description: Need to access the application from off-site." Underneath, there is a section "Create From Available Request Types" featuring a dropdown menu labeled "*Request Type:" and a "Create" button. At the bottom, a "Create Based On Desired Action" section lists several options: "Most Recently Created", "Application Enhancement", "Request a New Initiative", "Request an Application Enhancement", and "Report an Application Bug".

After submitting your Request, you can continue your Create session.

- Click the link (REQUEST #) to see the newly generated Request's details.
- If you are going to generate a new Request of a different Request Type, choose the Request Type from the REQUEST TYPE drop down list click **CREATE**.

Once a Request has been submitted, it is assigned an initial status (such as NEW). It is then routed along a standard business process of approvals, decisions, and/or actions, depending on the associated workflow. See "[Processing Requests](#)" on page 71 for details.

Creating a Request from the References Section

A new Request can also be created from the REFERENCES section of the Request's detail page.

1. Select **REQUEST (NEW)** from the NEW REFERENCE drop down list and click **ADD**. The CREATE NEW REQUEST page opens.

The screenshot shows a web application window titled "Create New Request". At the top right of the window is a "Close Window" button. Below the title bar is a header "Create New Request". The main content area contains a form with the following elements:

- A required field labeled "*Request Type:" followed by a dropdown menu.
- A section labeled "*Relationship:" containing seven radio button options:
 - Duplicate Request - (Informational) - The selected Request is a duplicate of Request 30010
 - Original of Duplicate Requests - (Informational) - The selected Request is the Original of these two duplicate Requests
 - Parent of this Request - (Informational) - The selected Request is the parent of Request 30010
 - Child of this Request - (Informational) - The selected Request is the child of Request 30010
 - Related to this Request - (Informational) - The selected Request is related to Request 30010
 - Successor - (Blocked) - Action not allowed on selected Request until Request 30010 closes
 - Predecessor - (Blocking) - Action not allowed on Request 30010 until the selected Request closes
- At the bottom right of the form area are two buttons: "Create" and "Cancel".

At the bottom of the window is another "Close Window" button.

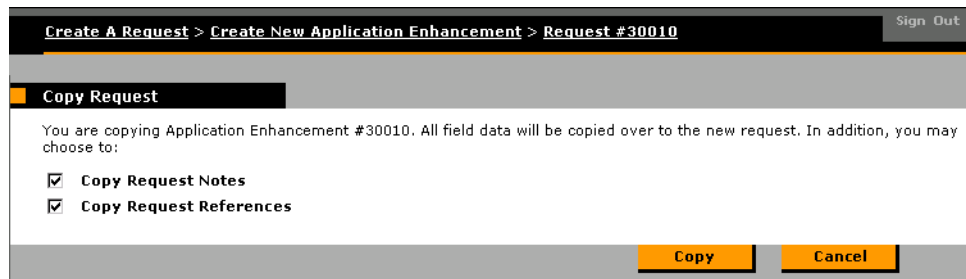
2. Choose the Request Type that you want to generate from the REQUEST TYPE drop down list.
3. Select a RELATIONSHIP by select the appropriate radio button.
4. Click **CREATE**. The CREATE NEW REQUEST page opens.
5. Enter the information related to your new Request.
6. Save and submit the new Request.

Copying Requests

You can create a new Request by copying an existing Request. This can save you time by eliminating the need to re-enter information that is common between the Requests.

To generate a new Request using the copy feature:

1. Open an existing Request.
2. Scroll to the bottom of the Request detail page.
3. Click **COPY**. The Copy Request window opens.



Create A Request > Create New Application Enhancement > Request #30010 Sign Out

Copy Request

You are copying Application Enhancement #30010. All field data will be copied over to the new request. In addition, you may choose to:

- Copy Request Notes**
- Copy Request References**

Copy **Cancel**

4. Select whether you want to copy the Request notes and References.
5. Click **COPY**. A new Request detail page opens with the copied information.
6. Modify the new Request's data as needed.
7. Click **SUBMIT**.



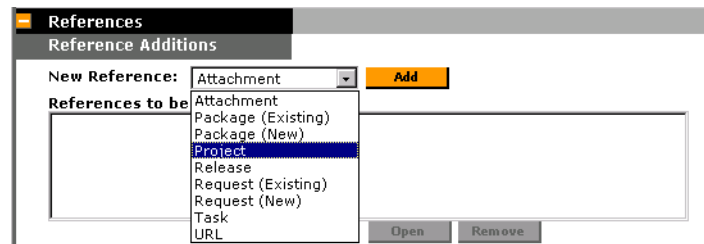
Copied Requests are not submitted by default. Ensure that you click **SUBMIT** in the Request page to send the Request along its Workflow.

Adding References

You can add a reference to your Request from the REQUEST page in the Kintana interface. There are several reference types defined in Kintana: ATTACHMENT, PACKAGE, PROJECT, RELEASE, REQUEST, TASK, and URL. For some reference types, such as for Packages and other Requests, 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 Request:

1. Within the REQUEST page, navigate to the **REFERENCES** section.
2. Select the type of reference to be generated from the NEW REFERENCE drop down list and click **ADD**.



An additional page opens where you can specify the exact reference. This page is different depending on the type of reference selected. The following sections provide instructions for referencing different entities:

- [“Attaching Requests”](#) on page 35
- [“Attaching Packages”](#) on page 37
- [“Attaching Releases”](#) on page 41
- [“Attaching Projects”](#) on page 41
- [“Attaching Tasks”](#) on page 43
- [“Referencing a URL in Kintana Create”](#) on page 44
- [“Referencing an Attachment in Kintana Create”](#) on page 45

Note

For some reference types, such as for Packages and other Requests, you can create a functional dependency to the reference. See [“Reference Dependency Relationships”](#) on page 47 for a list of the dependencies that can be set for each reference type.

Attaching Requests

To attach Requests to a Request:

1. Select **REQUEST (EXISTING)** from the NEW REFERENCE drop down list.
2. Click **ADD**. The ADD REFERENCE: REQUEST page opens.

Add Reference: Request Close Window X

Search Information Search Cancel

Request Type: Advanced Search

Status: Priority:

Assigned To: Assigned To Group:

Created By: Request Sub Type:

Department: Application:

Workflow: Request Group:

Contact: Company Name:

Linked Project/Task: Request #:

Creation Date From: To:

Keywords:

Preventing Action On: Requests Tasks Packages

Eligible for My Action? Yes No

Include Closed? Yes No

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Requests Displayed:

Choose Columns

Available Columns

- Application
- Assigned To Group
- Company Name
- Contact
- Creation Date
- Department
- Last Updated
- Request Group
- Request Sub Type

Selected Columns

- Req # *
- Request Type
- Description
- Status
- Assigned To
- Priority
- Created By

Note: Columns followed by an asterisk (*) cannot be removed from the display.

Search Cancel

3. Search for the Request to add by using the search fields and clicking **SEARCH**. The page refreshes with the Request(s) that match your search criteria and a list of relationship types.

Add Reference: Request Close Window

* Select which relationship the selected Requests will have to Request #30010:

- Duplicate Request - (Informational) - The selected Request is a duplicate of Request 30010
- Original of Duplicate Requests - (Informational) - The selected Request is the Original of these two duplicate Requests
- Parent of this Request - (Informational) - The selected Request is the parent of Request 30010
- Child of this Request - (Informational) - The selected Request is the child of Request 30010
- Related to this Request - (Informational) - The selected Request is related to Request 30010
- Successor - (Blocked) - Action not allowed on selected Request until Request 30010 closes
- Predecessor - (Blocking) - Action not allowed on Request 30010 until the selected Request closes

Request Search Results

Showing 3 Results

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/> 30010	Application Enhancement	Need to access the application from off-site.	New		Critical	jsmith
<input type="checkbox"/> 30008	PFM - Project Request	Update financial system.	New		Critical	gheath
<input type="checkbox"/> 30000	PFM - Project Request	CRM Implementation	New		Critical	admin

Showing 3 Results

Check All Clear All

Add Modify Search Cancel

Export Data to Excel

Close Window

4. Select the type of relationship you want to assign between the Request and its reference by clicking one of the radio buttons. See Table 4-2, “Reference Relationships,” on page 47 for a description of the various relationships that can be assigned.
5. Select the Request to reference. You can select more than one reference by checking more than one check box.
6. Click **ADD**. You return to the REFERENCES section in the REQUEST page. The newly attached Request is listed in the References section.
7. Click **SAVE** to save the attached Request as a Reference and close the REQUEST page.

Creating a New Request

A new Request can be created from a Request’s REFERENCES section and attached to the current Request. See [“Creating a Request from the References Section”](#) on page 32 for detailed instructions.

Attaching Packages

To attach a Package to a Request:

1. Select **PACKAGE (EXISTING)** from the NEW REFERENCE drop down list.
2. Click **ADD**. The ADD REFERENCE: PACKAGE page opens.

Add Reference: Package Close Window [X]

Search Information Search Cancel

Package #:

Workflow:

Object Type:

Object Name:

Assigned To:

Created By:

Creation Date From: To:

Keywords in Description:

Include Closed? Yes No

Eligible for My Action? Yes No

Submitted Only? Yes No

Preventing Action On? Requests Packages

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Packages Displayed:

Search Cancel

3. Search for the Package to add by using the search fields and clicking **SEARCH**. The page refreshes with the Package(s) that match your search criteria and a list of relationship types.

Close Window

Add Reference: Package

***Select which relationship the selected Packages will have to Request #30010:**

Child of this Request - (Informational) - The selected Package is the child of Request 30010

Related to this Request - (Informational) - The selected Package is related to Request 30010

Predecessor - (Blocking) - Action not allowed on Request 30010 until selected Package closes

Successor - (Blocked) - Action not allowed on selected Package until Request 30010 closes

Package Search Results

Showing 12 Results

Pkg #	Workflow	Status	Priority	Assigned To	Pkg Lines	Description
<input type="checkbox"/>	30018 Dev -> Test -> Prod	New	High	pmoore	1	Production Update - patch #2113
<input type="checkbox"/>	30017 Dev -> Test -> Prod	In Progress	Low	rcarter	1	Updating the Internal Web Site
<input checked="" type="checkbox"/>	30016 Dev -> Test -> Prod	In Progress	High	jennysmith	1	Updating Web Site
<input type="checkbox"/>	30015 Dev -> Test -> Prod	In Progress	Critical	sedwards	1	Production Update - patch #2003
<input type="checkbox"/>	30014 Dev -> Test -> Prod	In Progress	Normal	ssingh	1	Production Update - patch #1443
<input checked="" type="checkbox"/>	30013 Dev -> Test -> Prod	In Progress	High	jflyer	1	Production Update - patch #1337
<input type="checkbox"/>	30012 Dev -> Test -> Prod	In Progress	Low	ajaisal	1	Production Update - patch #1003
<input type="checkbox"/>	30010 Dev -> Test -> Prod	In Progress	High	lhoward	2	Production Update - patch #1002
<input type="checkbox"/>	30008 Dev -> Test -> Prod	In Progress	Low	athomas	1	Patching Application
<input type="checkbox"/>	30006 Dev -> Test -> Prod	In Progress	Critical	tsanchez	1	Updating Production Environment
<input type="checkbox"/>	30005 Dev -> Test -> Prod	In Progress	Low	bseagrave	1	Migrating a file

4. Select the type of relationship you want to assign between the Request and its reference by clicking one of the radio buttons. See Table 4-2, “Reference Relationships,” on page 47 for a description of the various relationships that can be assigned.
5. Select the Package to reference. You can select more than one reference by checking more than one check box.
6. Click **ADD**. You return to the REFERENCES section in the REQUEST page. The newly attached Package is listed in the REFERENCES section.
7. Click **SAVE** to save the attached Package as a Reference and close the REQUEST page.

Creating a New Package

A new Package can be created from a Request’s REFERENCES section and attached to the current Request.

1. Select **PACKAGE (NEW)** from the NEW REFERENCE drop down list and click **ADD**. The CREATE NEW PACKAGE page opens.

Create New Package

***Relationship:**

- Child of this Request - (Informational) - The selected Package is the child of Request 30010
- Related to this Request - (Informational) - The selected Package is related to Request 30010
- Predecessor - (Blocking) - Action not allowed on Request 30010 until selected Package closes
- Successor - (Blocked) - Action not allowed on selected Package until Request 30010 closes

Create **Cancel**

2. Select a RELATIONSHIP by clicking the appropriate radio button.
3. Click **CREATE**. The window refreshes to display the NEW PACKAGE page. Matching header information is defaulted in the Package page, such as Description, Priority, and Package Type.

New Package 30025

Header

***Package No.:** 30025 **Package Group:** [] **Created By:** jsmith

Description: Need to access the application from off-site. **Created On:** May 21, 2003

***Workflow:** [] **Status:** New

Assigned User: [] **Priority:** Critical

Assigned Group: [] **Package Type:** Customization

Parent: [] **Priority Seq:** 50

Percent Complete: 0

Status

View: All Lines **Go**

Seq	Object Name	Object Type
This package does not have any Lines to show.		

Notes

Notes to be added on save:

References

Reference Additions

New Reference: Attachment **Add**

References to be added on Save:

Save **Cancel**

4. Enter any additional HEADER information or NOTES and click **SAVE**. Note that you can not add Package Lines using the standard Kintana interface. You

must add Package Lines using the Kintana Workbench. See "[Processing Packages](#)" for details.

The NEW PACKAGE page closes and the new Package is displayed in the Request's REFERENCE section.

Attaching Releases

1. Select **RELEASE** from the NEW REFERENCE drop down list.
2. Click **ADD**. The REFERENCE RELEASE page opens.
3. Select the Release to reference from the RELEASE field.
4. Click **ADD**. You return to the REFERENCES section in the REQUEST page. The newly attached Release is listed in the REFERENCES section.
5. Click **SAVE** to save the attached Release as a Reference and close the REQUEST page.

Attaching Projects

1. Select **PROJECT** from the NEW REFERENCE drop down list.
2. Click **ADD**. The ADD REFERENCE: PROJECT page opens.

Add Reference: Project Close Window [X]

Search Information Search Cancel

Project Name: Project #:
 Project Manager: Department:
 Include Finished Projects: Yes No Project State:
 Summary Condition:
 No Summary Condition
 Scheduled Start Date From: To:
 Scheduled Finish Date From: To:
 Show only master projects? Yes No
 Program:

Clear Fields

Result Display Options

Sort By: Ascending
 Descending

*Maximum Projects Displayed:

Search Cancel

- Search for the Project to add by using the search fields and clicking **SEARCH**. The page refreshes with the Project(s) that match your search criteria and a list of relationship types.

Add Reference: Project Close Window [X]

Add Modify Search Cancel

*Select which relationship the selected Projects will have to Request #30010:
 Related to this Request - (Informational) - Selected Project is related to Request 30010

Project Search Results

Showing 26 Results

Project Name	Project State	Scheduled Start	Scheduled Finish	Project Manager	Department
<input checked="" type="checkbox"/> <input type="checkbox"/> Blackberry Rollout	Active	May 26, 2003	July 8, 2003	Admin User	
<input type="checkbox"/> <input type="checkbox"/> COMP & BEN	Active	January 15, 2004	November 15, 2005	Admin User	
<input type="checkbox"/> <input type="checkbox"/> CRM Upgrade	Active	March 14, 2003	April 28, 2003	Admin User	
<input type="checkbox"/> CRM Upgrade 2	New	March 14, 2003	April 28, 2003	John Smith	
<input type="checkbox"/> <input type="checkbox"/> Development Laptop Upgrade	Active	May 2, 2003	June 5, 2003	John Smith	
<input type="checkbox"/> <input type="checkbox"/> Di test	Active	April 23, 2003	April 23, 2003	Admin User	
<input type="checkbox"/> <input type="checkbox"/> Governance Project Rollout	Active	May 15, 2003	October 20, 2003	George Heath	
<input type="checkbox"/> <input type="checkbox"/> JAPAN	Active	January 15, 2004	January 15, 2007	Admin User	
<input type="checkbox"/> <input type="checkbox"/> Kintana Pilot	Active	February 5, 2003	July 10, 2003	Admin User	
<input type="checkbox"/> <input type="checkbox"/> Kintana Portfolio Management Pilot	External (Ac...	April 24, 2003	May 23, 2003	George Heath	

- Select the Project to reference. You can select more than one reference by checking more than one check box.

5. Click **ADD**. You return to the REFERENCES section in the REQUEST page. The newly attached Project is listed in the REFERENCES section.
6. Click **SAVE** to save the attached Project as a Reference and close the REQUEST page.

Attaching Tasks

1. Select **TASK** from the NEW REFERENCE drop down list.
2. Click **ADD**. The ADD REFERENCE: TASK page opens.

Add Reference: Task Close Window

Search Information Search Cancel

Task Name: Task #:

Resource: Department:

Task Category: Task State:

Include Finished Tasks: Yes No

Scheduled Start Date From: To:

Scheduled Finish Date From: To:

Show only tasks with exceptions? Yes No

Show only milestones? Yes No

Related Information

Project Name: Project Manager:

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Tasks Displayed:

Search Cancel

3. Search for the Task to add by using the search fields and clicking **SEARCH**. The page refreshes with the Task(s) that match your search criteria and a list of relationship types.

Add Reference: Task

***Select which relationship the selected Tasks will have to Request #30010:**

Related to this Request - (Informational) - The selected Task is related to Request 30010

Predecessor - (Blocking) - Action not allowed on Request 30010 until selected Task closes

Successor - (Blocked) - Action not allowed on selected Task until Request 30010 closes

FF Predecessor - (Finish Finish Predecessor) - Selected Task does not complete until Request 30010 closes

Request Updates Task - (Auto-Updating) - Selected task is automatically updated by Request 30010

Task Search Results

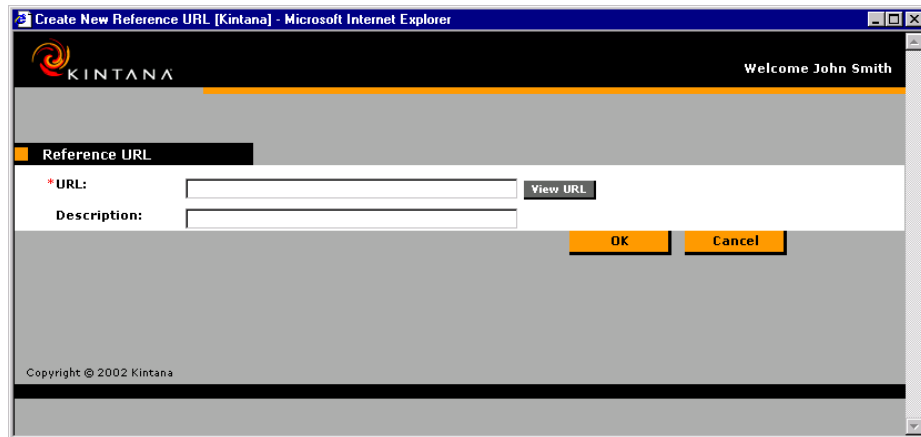
Task Name	Project Path	Task Category	Task State	Scheduled Start
<input type="checkbox"/> ♦ Commit to Project	Blackberry Rollout > Commit to Project		Pending Pred...	June 17, 2003
<input type="checkbox"/> ♦ Go Live	Blackberry Rollout > Go Live		Pending Pred...	July 8, 2003
<input type="checkbox"/> I. Requirements Analysis	Blackberry Rollout > I. Requirements Analysis		Ready	May 26, 2003
<input type="checkbox"/> II. Solution Design	Blackberry Rollout > II. Solution Design		Pending Pred...	May 29, 2003
<input type="checkbox"/> III. Prototype	Blackberry Rollout > III. Prototype		Pending Pred...	June 3, 2003
<input type="checkbox"/> IV. User Acceptance	Blackberry Rollout > IV. User Acceptance		Pending Pred...	June 10, 2003
<input type="checkbox"/> IX. Train Users	Blackberry Rollout > IX. Train Users		Pending Pred...	July 4, 2003
<input type="checkbox"/> V. Detailed Design	Blackberry Rollout > V. Detailed Design		Pending Pred...	June 17, 2003
<input type="checkbox"/> VI. Build	Blackberry Rollout > VI. Build		Pending Pred...	June 20, 2003
<input checked="" type="checkbox"/> VII. Test	Blackberry Rollout > VII. Test		Pending Pred...	June 30, 2003
<input type="checkbox"/> VIII. User Signoff	Blackberry Rollout > VIII. User Signoff		Pending Pred...	July 3, 2003

4. Select the type of relationship you want to assign between the Request and its reference by clicking one of the radio buttons. See Table 4-2, “Reference Relationships,” on page 47 for a description of the various relationships that can be assigned.
5. Select the Task to reference. You can select more than one reference by checking more than one check box.
6. Click **ADD**. You return to the REFERENCES section in the REQUEST page. The newly attached Task is listed in the REFERENCES section.
7. Click **SAVE** to save the attached Task as a Reference and close the REQUEST page.

Referencing a URL in Kintana Create

To add a URL as a Reference:

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



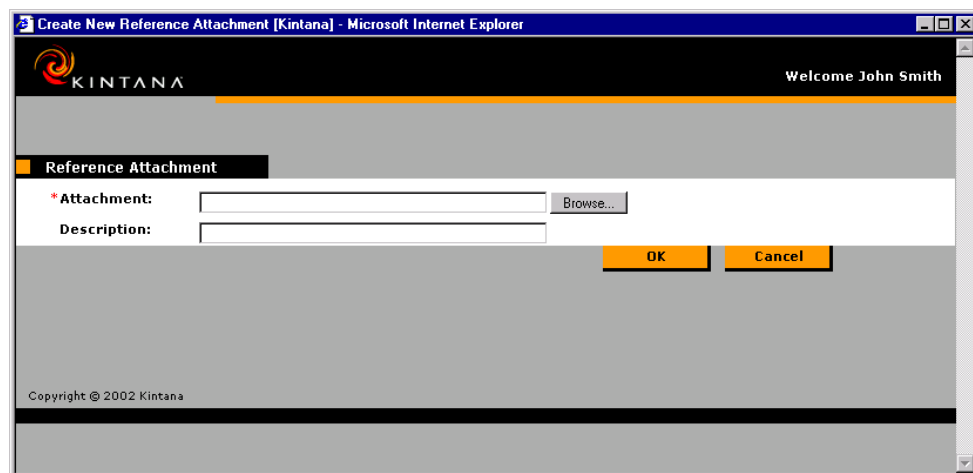
The screenshot shows a web browser window titled "Create New Reference URL [Kintana] - Microsoft Internet Explorer". The page header includes the Kintana logo and "Welcome John Smith". The main content area is titled "Reference URL" and contains two input fields: "* URL:" and "Description:". A "View URL" button is positioned to the right of the URL field. Below the input fields are "OK" and "Cancel" buttons. The footer of the page reads "Copyright © 2002 Kintana".

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

Referencing an Attachment in Kintana Create

To add an attachment as a Reference:

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



The screenshot shows a web browser window titled "Create New Reference Attachment [Kintana] - Microsoft Internet Explorer". The page header includes the Kintana logo and "Welcome John Smith". The main content area is titled "Reference Attachment" and contains two input fields: "* Attachment:" and "Description:". A "Browse..." button is positioned to the right of the Attachment field. Below the input fields are "OK" and "Cancel" buttons. The footer of the page reads "Copyright © 2002 Kintana".

2. Click **BROWSE** to locate and select the desired file from your local machine and enter a description if desired.
3. Click **OK** to add the selected Attachment as a Reference.
4. The referenced Attachment appears in the REFERENCES TO BE ADDED ON SAVE list on the REQUEST page. *The Reference has not been added yet.*
5. Click **SAVE** to add the Attachment to the Request.

Valid 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 Request. The attached file is copied to the server and can then be accessed by other Kintana users. This feature is particularly helpful when you need to reference a document that is not already Web accessible.
PACKAGE (EXISTING)	You can reference existing Packages directly from the REFERENCE tab.
PACKAGE (NEW)	New Packages can also be created from a Request in the REFERENCES tab. Also, if configured as part of the current Workflow, you can spawn a Package from a step in the Request's Workflow. When this happens, a reference to that Package is automatically generated, establishing a two-way link between the Request and the referenced Package.
PROJECT	You can reference a Project in Kintana Drive.
RELEASE	You can associate a Request with a Release by referencing the Release name.
REQUEST (EXISTING)	You can reference other Requests directly from the REFERENCE tab.

Table 4-1. Valid References in the Reference Tab

Type	Description
REQUEST (NEW)	<p>New Requests can be created from an existing Request in the REFERENCES tab.</p> <p>Also, if configured as part of the Kintana Create Workflow, you can spawn a Request from a Request. When this happens, a reference to that Request is automatically generated, establishing a two-way link between the Requests.</p>
TASK	You can reference a Task in a Kintana Project.
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 Request 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 Request.
Packages	Child of this Request	(Informational) - The selected Package is the child of the Request.
	Related to this Request	(Informational) - The selected Package is related to the Request.
	Predecessor	(Blocking) - Action is not allowed on the Request until the referenced Package closes.
	Successor	(Blocking) - Action is not allowed on the referenced Package until the Request closes.
Projects	Related to This Request	(Informational) Selected Project is related to this Request.
Releases	Contains This Package	The Request is contained in the selected Release.

Table 4-2. Reference Relationships

Entity	Relationships	Description
Requests	Duplicate Request	(Informational) The referenced Request is a duplicate of the Request.
	Original Duplicate Requests	(Informational) The referenced Request is the original of the two duplicate Requests.
	Parent of this Request	(Informational) The referenced Request is the parent of the Request.
	Child of this Request	(Informational) The referenced Request is the child of the Request.
	Related to this Request	(Informational) Referenced Request is related to this Request.
	Predecessor	(Blocking) Action not allowed on this Request until the referenced Request closes.
	Successor	(Blocking) Action not allowed on the referenced Request until this Request closes.
Tasks	Related to This Request	(Informational) The referenced Task is related to this Request.
	Predecessor	(Blocking) Action not allowed on this Request until the referenced Task closes.
	Successor	(Blocking) Action not allowed on the referenced Task until this Request closes.
	FF Predecessor (Finish Finish Predecessor)	(Blocking) The referenced Task does not complete until the Request closes.
	Request Updates Task	(Auto-updating) The referenced Task is automatically updated by the Request.
URL	Standard URL interaction	(Informational) The URL is related to this Request.

Saving an Un-Submitted Request

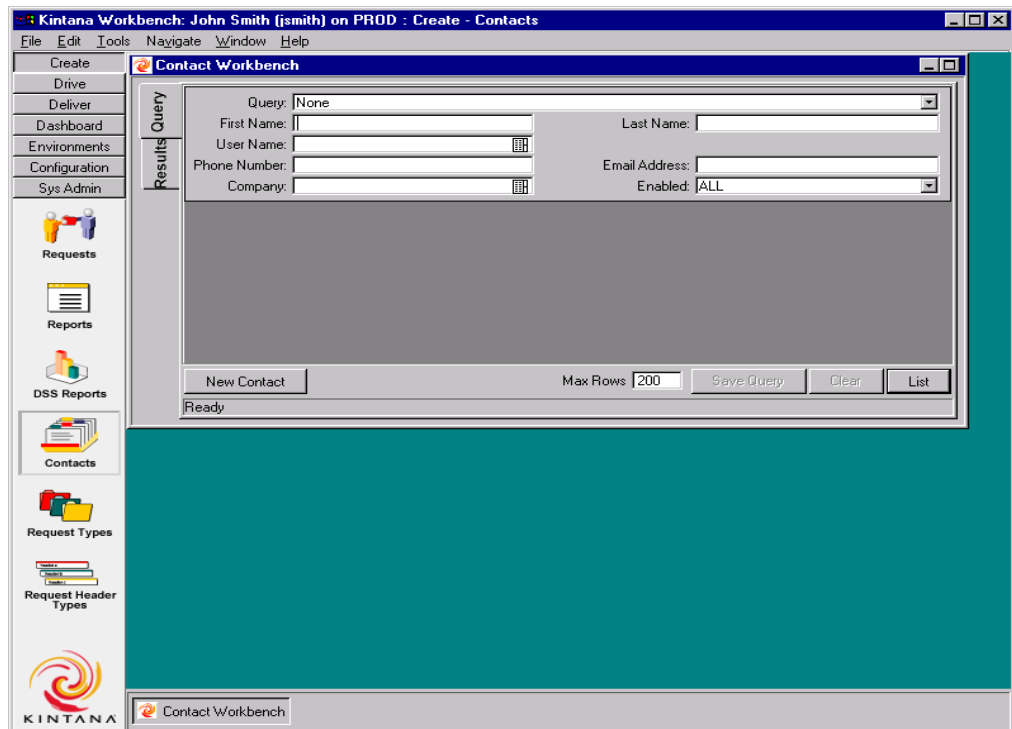
Kintana can be configured to enable you to save an un-submitted Request. This feature requires that your Kintana administrator alter a server configuration parameter. Enabling this feature may not be desirable for your business situation. Contact your Kintana administrator for help with this setting.



The server parameter used to enable this feature is `ALLOW_SAVE_REQUEST_DRAFT`.

Adding and Editing Contacts

Users belonging to appropriate Security Groups (KINTANA CREATE CONTACT MANAGER and USER MANAGER) can add or edit a Contact using the CONTACTS WORKBENCH. Open the CONTACT WORKBENCH by selecting **ADMINISTRATION > OPEN KINTANA WORKBENCH** menu. Then click **CREATE** in the shortcut bar and click the **CONTACTS** icon.

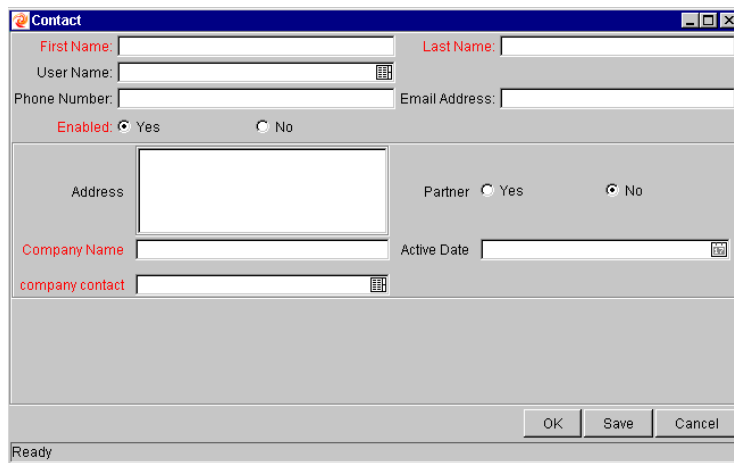


Adding a Contact

To add a new Contact:

1. Click **CREATE** in the shortcut bar and click the **CONTACTS** icon. The CONTACT WORKBENCH opens.

2. Click **NEW CONTACT**. The **CONTACT** window opens.



The screenshot shows a window titled "Contact" with a blue title bar. The window contains several input fields and controls:

- First Name:** Text input field.
- Last Name:** Text input field.
- User Name:** Text input field with a list icon on the right.
- Phone Number:** Text input field.
- Email Address:** Text input field.
- Enabled:** Radio buttons for "Yes" (selected) and "No".
- Address:** A large empty text area.
- Partner:** Radio buttons for "Yes" and "No" (selected).
- Company Name:** Text input field.
- Active Date:** Text input field with a calendar icon on the right.
- company contact:** Text input field with a list icon on the right.

At the bottom right of the window are three buttons: "OK", "Save", and "Cancel". The status bar at the bottom left shows "Ready".

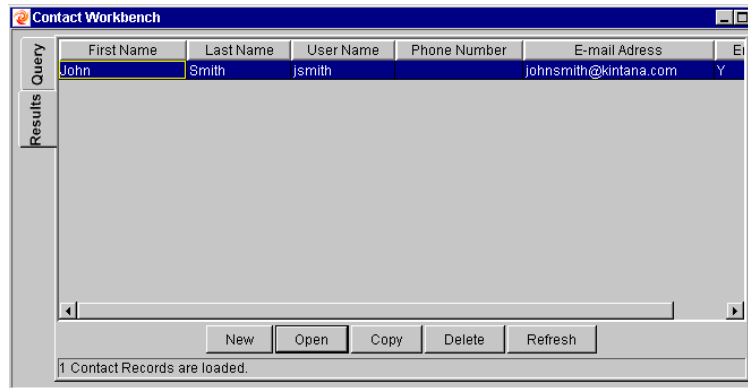
3. Enter the required contact information (and any additional information) corresponding to the fields available in the **CONTACT** window. The fields vary depending on your local configuration.
4. Select **Enabled = YES** to include this contact in a list of available contacts.
5. Click **OK**.

This Contact can now be used in the Contact fields in the Request header.

Editing an Existing Contact

1. Click **CREATE** in the shortcut bar and click the **CONTACTS** icon. The **CONTACT WORKBENCH** opens.
2. Locate the existing contact by entering your search criteria in the appropriate field (such as First Name, Last Name or Username) and clicking **LIST**.

The results from the search are displayed in the **RESULTS** tab.



3. Select the desired user.
4. Click **OPEN**. The **CONTACT** window opens with the user's info loaded.

The screenshot shows the 'Contact' application window. It contains a form with the following fields and controls:

- First Name: John
- Last Name: Smith
- User Name: jsmith
- Phone Number: 555-5555
- Email Address: johnsmith@kintana.com
- Enabled: Yes No
- Address: 1314 Chesapeake Terrace, Sunnyvale, CA 94089
- Partner: Yes No
- Company Name: Kintana
- Active Date: [empty]
- company contact: [empty]

At the bottom of the form are buttons for 'OK', 'Save', and 'Cancel'. The status bar at the bottom left shows 'Ready'.

5. Make any desired changes.
 6. Click **OK**.
- The edited contact information is saved.

Chapter
5

Viewing Request Status and Details

Once a Request has been created, it begins moving towards completion along its designated Workflow. Kintana Create users can search for and view a Request at any point in the Request's lifecycle, provided they have the appropriate permissions. The following sections discuss the ways in which a user can locate and view Requests:

- [*Searching for Requests*](#)
- [*Viewing Request Information*](#)
- [*Using Dashboard Portlets to View Request Information*](#)

Searching for Requests

The following sections discuss different Request search features:

- [*Simple Search*](#)
- [*Advanced Search*](#)
- [*Saving your Search*](#)

Simple Search

To locate a Request:

1. Logon to Kintana.

2. Select **SEARCH > REQUESTS** from the menu at the top of the page. The **SEARCH REQUESTS** page opens.

Click Request to open the Search Request page.

3. Enter the search criteria for the Request. You can limit the maximum number of results in the **MAXIMUM REQUESTS DISPLAYED** field. In general, you can search for a Request based on any parameters appearing in the **REQUESTS SEARCH** page, such as **REQUEST NUMBER**, **REQUEST TYPE**, or **CREATED BY**.
4. (Optional) To save the search criteria for future searches, enter a unique name for the search query in the **SAVE THIS SEARCH AS** field and click **SAVE**. Entering a non-unique name will prompt you to replace the existing saved search query of the same name. See *“Saving your Search”* on page 59 for more information about saving searches.

5. Click **SEARCH**. The **REQUEST SEARCH RESULTS** page opens.

Dashboard - Manage Packages > Dashboard - Critical Requests > Request #30004 > Request Search > Search Results [Sign Out](#)

Save this search as: [Save](#) [Manage Saved Searches](#)

Request Search Results [Modify Search](#) Showing 5 Results

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30010	Application Enhancement	Need to access the application from off-site.	New (Pending Package #30025 - 0%)		Critical	jsmith
30009	Application Enhancement	Adding new Report functionality to the system.	Assigned		High	jsmith
30006	DEM - Initiative	Need new financial reporting software.	New		High	jsmith
30005	DEM - Application Enhancement	Need to automate time sheet approval process.	New		Normal	jsmith
30004	DEM - Application Bug	ERP application doesn't work.	In Further Review	jsmith	High	jsmith

Showing 5 Results

[Export Data to Excel](#) [Modify Search](#)

The Request Search Results page displays all of the Requests that match your search criteria. Click on the number of the Request you would like to view. This opens that Request's detail page.

If your search did not yield the desired results, click **MODIFY SEARCH** to return to the **REQUEST SEARCH** page. The search fields will contain your parameters, allowing you to modify your search without having to enter everything a second time.

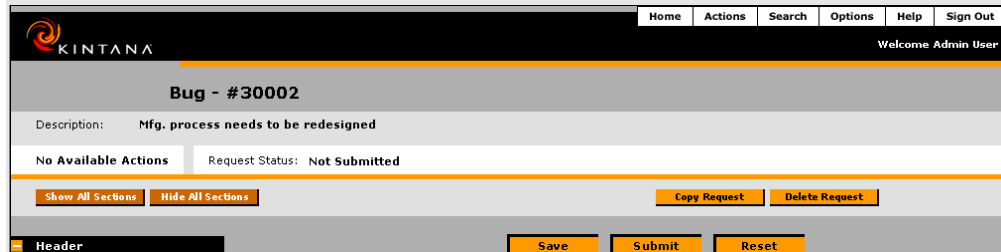


You can easily export your search results into a Microsoft Excel spreadsheet by clicking the **EXPORT DATA TO EXCEL** link at the bottom of your search results.



Note

If the Request you open in the Request's detail page has not been submitted, a **SUBMIT** button displays in the area above the HEADER section and at the bottom of the page. The Request Status field displays 'NOT SUBMITTED.'



Click the **SUBMIT** button to submit the Request to begin processing the Request through its Workflow.

Viewing the Details for a Specific Request

If you already know the number of the Request, you can enter it into the VIEW DETAILS FOR REQUEST # field at the top of the REQUEST SEARCH page.

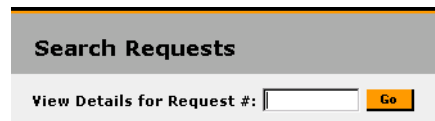


Figure 5-1 View Details for Request # Field

Click **Go** after entering the Request number to proceed to the Request's detail page.

Setting the Results Display

You can specify which columns appear in the REQUEST SEARCH RESULTS page. At the bottom of the REQUEST SEARCH page, the CHOOSE COLUMNS section allows you to select columns to display.

Result Display Options

Sort By: Request # Ascending Descending

*Maximum Requests Displayed: 200

Choose Columns

Available Columns

- Application
- Assigned To
- Assigned To Group
- Company Name
- Contact
- Created By
- Department
- Last Updated
- Priority

Selected Columns

- Request # *
- Request Type
- Description
- Status

Note: Columns followed by an asterisk (*) cannot be removed from the display.

Save this search as:

Figure 5-2 Request Search Result Display Options

All columns in the SELECTED COLUMNS list will be shown in the REQUEST SEARCH RESULTS page.

- Use the buttons to move columns between the AVAILABLE and SELECTED lists.
- Use the buttons to order columns in the SELECTED list.
- The REQUEST # column and any other column marked with an asterisk (*) cannot be removed from the display.

Advanced Search

Each Request Type contains Request fields that are specific to that Request Type. The ADVANCED SEARCH functionality allows you to perform searches using any field contained in a Request Type.

If you are searching for a Request of a particular Request Type, fill in the REQUEST TYPE field and click **ADVANCED SEARCH**. The ADVANCED SEARCH page opens, containing fields specific to the desired Request Type for more precise searches.

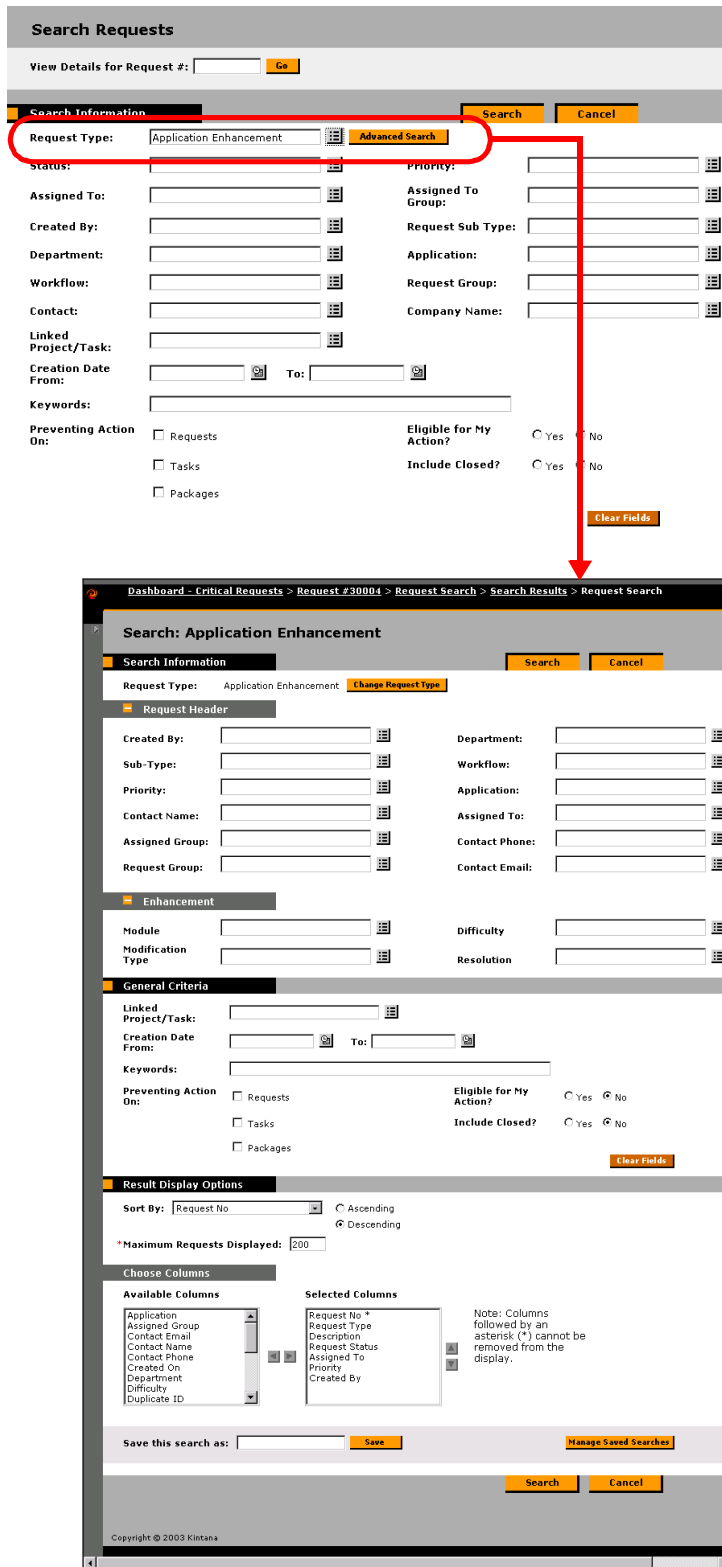


Figure 5-3 Advanced Search Page for 'Application Enhancement' Request Type

Saving your Search

You can save, organize, and reuse search queries in Kintana Create. This eliminates the need to re-enter search criteria for any searches you perform on a regular basis. A search query can be saved from the following HTML interface pages:

- SEARCH REQUESTS page
- ADVANCED SEARCH REQUESTS page
- REQUEST SEARCH RESULTS page

You can access the **MANAGE YOUR SAVED SEARCHES** page from any of these pages by clicking **MANAGE SAVED SEARCHES** or selecting **SEARCH > SAVED SEARCHES > MANAGE SAVED SEARCHES** from the menu. The **MANAGE YOUR SAVED SEARCHES** page lets you create categories for organizing saved searches. See [“Organizing Saved Searches”](#) on page 60 for more information on organizing saved searches.

To save search queries from any of these pages:

1. Enter a unique name for the search query in the **SAVE THIS SEARCH AS** field.

The search query name can be entered:

- In the **SEARCH RESULTS** page or **ADVANCED SEARCH RESULTS** page before you perform the search.
- In the **REQUEST SEARCH RESULTS** page after you perform the search.

2. Click **SAVE**. The **SAVE SEARCH** confirmation window opens.



3. From the **SAVE SEARCH** confirmation window, you can:

- Return to the page where you initiated the search.
- Go to the **MANAGE YOUR SAVED SEARCHES** page by clicking **MANAGE SAVED SEARCHES**.

The search query has been saved under the default **NO CATEGORY** section of the **MANAGE YOUR SAVED SEARCHES** page.

Organizing Saved Searches

Saved searches can be organized under different categories that you create in the **MANAGE YOUR SAVED SEARCHES** page.

To organize your saved searches:

1. Click **MANAGE SAVED SEARCHES** from the **SEARCH REQUESTS** page, the **ADVANCED SEARCH REQUEST** page, the **REQUEST SEARCH RESULTS** page, or the menu. The **MANAGE YOUR SAVED SEARCHES** page opens.

By default, the saved searches are listed under **NO CATEGORY** until you create a category for them and move them to the new category.



2. Click **ADD NEW CATEGORY**. A new **CATEGORY NAME** area displays on the page.
3. Enter a unique name for the category in the **CATEGORY NAME** field.

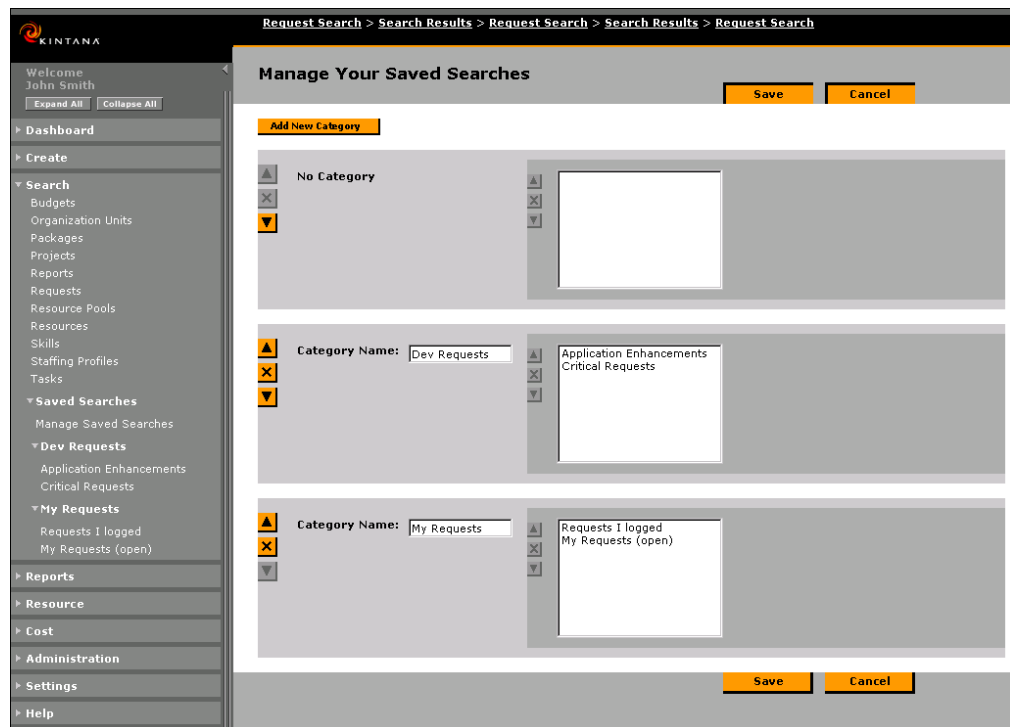
The **UP/DOWN** directional arrows and **DELETE** button to the left of the **CATEGORY NAME** let you change the position of the Category on the page or delete the Category from the page.

The **UP/DOWN** directional arrows and Delete button to the left of the saved searches let you change the position of the searches within the Category or delete the saved search from the Category. You can also move searches between Categories.

You can change the name of the Category by editing it in the Category Name field. However, the names of the saved searches cannot be changed.

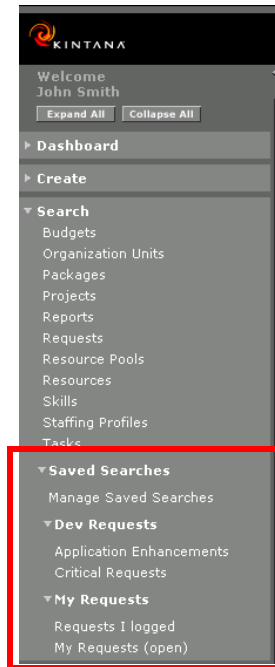
4. When you have setup the MANAGE YOUR SAVED SEARCHES page the way you want, click **SAVE**.

The saved searches shown in the following example are organized into DEV REQUESTS and MY REQUESTS categories. The MANAGE YOUR SAVED SEARCHES page is shown below after the Categories have been created and the appropriate saved searches have been moved into those categories.



Running Saved Searches

All saved searches and the categories to which they belong display on the Kintana menu. To run a saved search, select **SEARCH > SAVED SEARCHES > YOUR SEARCH** from the Kintana menu.



The user who created the saved search is the only one with access to use that saved search.

Viewing Request Information

In addition to viewing the information displayed in the Request window, users can view another layer of information concerning their Requests. From the Request page's **STATUS** section, users can perform the following:

- [*Viewing the Workflow Step Information URL*](#)
- [*Viewing the Graphical View of the Request*](#)
- [*Viewing the % Complete*](#)
- [*Viewing the Approval Details of a Step*](#)
- [*Viewing the Members of a Security Group for a Step*](#)
- [*Viewing the Request Transaction History*](#)
- [*Viewing the Request Execution Log*](#)

Viewing the Workflow Step Information URL

Each Workflow Step can be associated with a Web address (URL) during Workflow configuration. This can help provide more instructions or background information on the specific step. If a URL is associated with the Workflow Step, the WORKFLOW STEP NAME will appear as a hyperlink. Click the link to display more information on the step.

Viewing the Graphical View of the Request

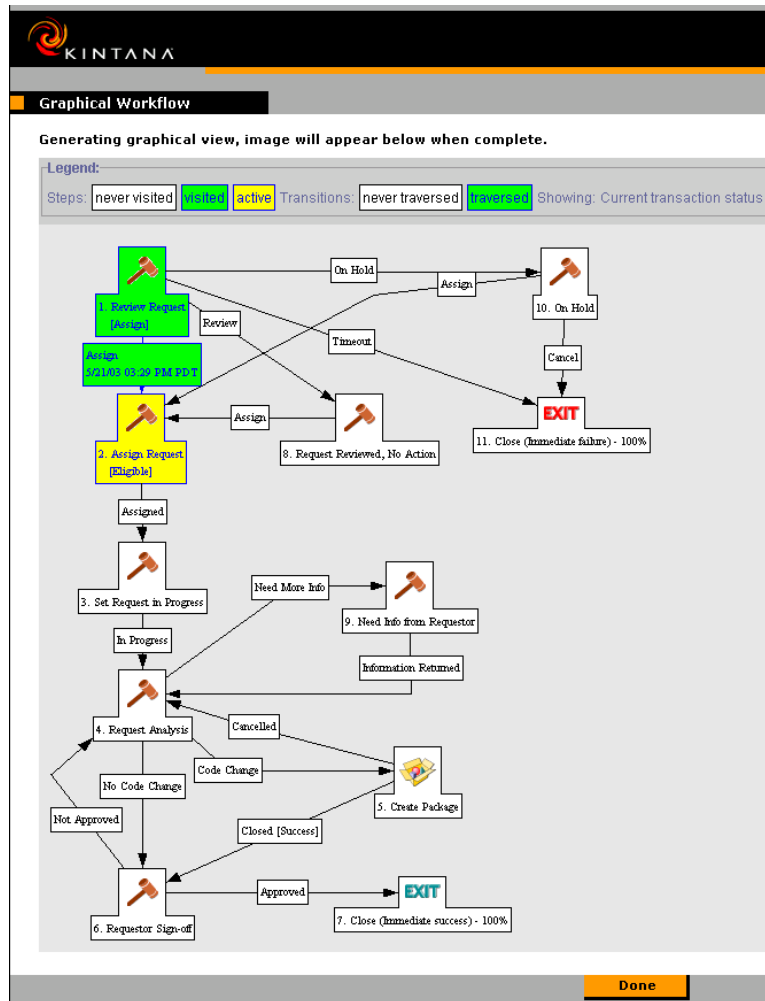
To graphically view a Request's process and its status:

1. Open the Request and scroll down to the STATUS region or click the **VIEW FULL STATUS BELOW** link at the top of the page.

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 21, 2003 03:29:32 PM PDT
2	Assign Request	Assign Request (View Available Actions)		May 21, 2003 03:29:34 PM PDT
3	Set Request in Progress			
4	Request Analysis			
5	Create Package			
6	Requestor Sign-off			
7	Close (Immediate success)			
8	Request Reviewed, No Action			
9	Need Info from Requestor			
10	On Hold			
11	Close (Immediate failure)			

Expand Steps | Collapse Steps | [Graphical View](#) | [Approval Details](#) | [Transaction Details](#) | [Cancel Request](#)

2. Click **GRAPHICAL VIEW**. The GRAPHICAL WORKFLOW page for this Request opens.



3. Click **DONE** to return to the Request page.

Viewing the % Complete

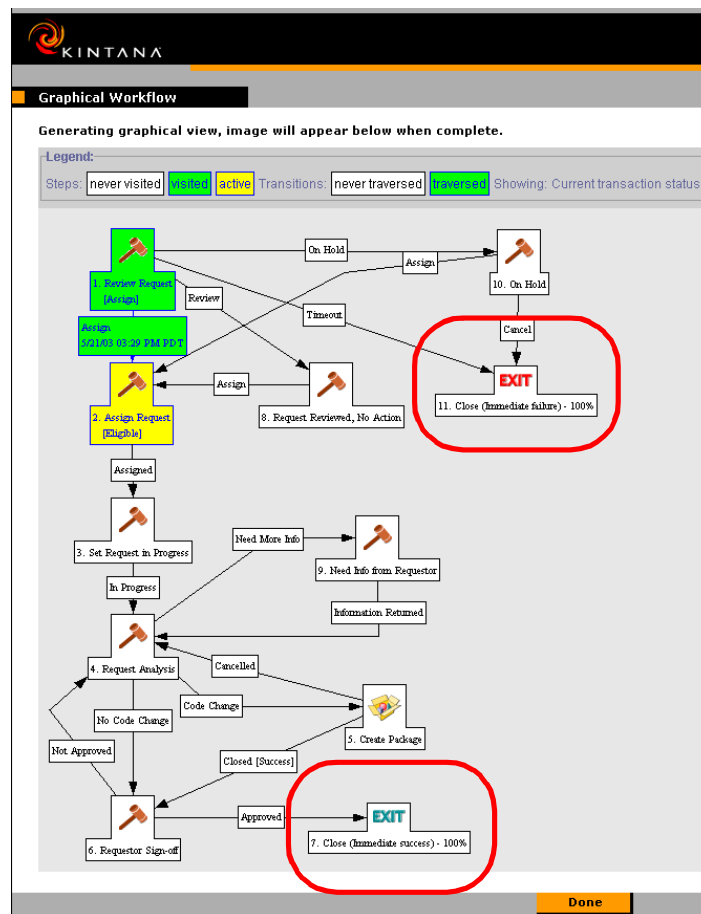
Workflows can be configured to include a 'CURRENT % COMPLETE' value. A CURRENT % COMPLETE can be assigned to individual Workflow Steps. As the Request moves along the Workflow, its % Complete is updated according to each Step's configured value. To view the CURRENT % COMPLETE information for a Request:

1. Open the Request and scroll down to the STATUS region.

Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 21, 2003 03:29:32 PM PDT
2	Assign Request	Assign Request (View Available Actions)		May 21, 2003 03:29:34 PM PDT
3	Set Request in Progress			
4	Request Analysis			
5	Create Package			
6	Requestor Sign-off			
7	Close (Immediate success)			
8	Request Reviewed, No Action			
9	Need Info from Requestor			
10	On Hold			
11	Close (Immediate failure)			

Expand Steps | Collapse Steps | **Graphical View** | Approval Details | Transaction Details | Cancel Request

- Click **Graphical View**. The Graphical Workflow page for this Request opens.



The Graphical Workflow page displays this Request’s Workflow. The Current % Complete for each Workflow Step also appears.

- Click **OK** to return to the Request page.

Viewing the Approval Details of a Step


Some Workflow Steps can be configured to require approvals from more than one user. To view the approval details of a Workflow Step:

1. Open the Request page and scroll down to the STATUS region.

Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 21, 2003 03:29:32 PM PDT
2	Assign Request	Assign Request (View Available Actions)		May 21, 2003 03:29:34 PM PDT
3	Set Request in Progress			
4	Request Analysis			
5	Create Package			
6	Requestor Sign-off			
7	Close (Immediate success)			
8	Request Reviewed, No Action			
9	Need Info from Requestor			
10	On Hold			
11	Close (Immediate failure)			

Expand Steps | Collapse Steps | Graphical View | **Approval Details** | Transaction Details | Cancel Request

2. Click the 'APPROVAL DETAILS' link. The APPROVAL DETAILS page opens.



Approval Details - Application Enhancement #30009

Request Status: Assigned **Description:** Adding new Report functionality to the system.

Active Workflow Steps	
2 - Assign Request	Eligible since May 21, 2003; Only one user must decide (no deadline)
Decision Results	Approvers
[No Decision]	Security Group: Kintana Administrator
Decision Date	

Completed Workflow Steps	
1 - Review Request	Assign; Only One user needed to decide
Decision Results	Approvers
Assign	John Smith
Decision Date	May 21, 2003 03:29 PM PDT

Done

3. Click Done to return to the Request page.

Viewing the Members of a Security Group for a Step


To view the members of a Security Group who can act on a particular step:

1. Open the Request page and scroll down to the STATUS region.

Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 21, 2003 03:29:32 PM PDT
2	Assign Request	Assign Request (View Available Actions)		May 21, 2003 03:29:34 PM PDT
3	Set Request in Progress			
4	Request Analysis			
5	Create Package			
6	Requestor Sign-off			
7	Close (Immediate success)			
8	Request Reviewed, No Action			
9	Need Info from Requestor			
10	On Hold			
11	Close (Immediate failure)			

[Expand Steps](#) | [Collapse Steps](#) | [Graphical View](#) | [Approval Details](#) | [Transaction Details](#) | [Cancel Request](#)

- Click the 'APPROVAL DETAILS' link. The APPROVAL DETAILS page opens.


KINTANA

Approval Details - Application Enhancement #30009

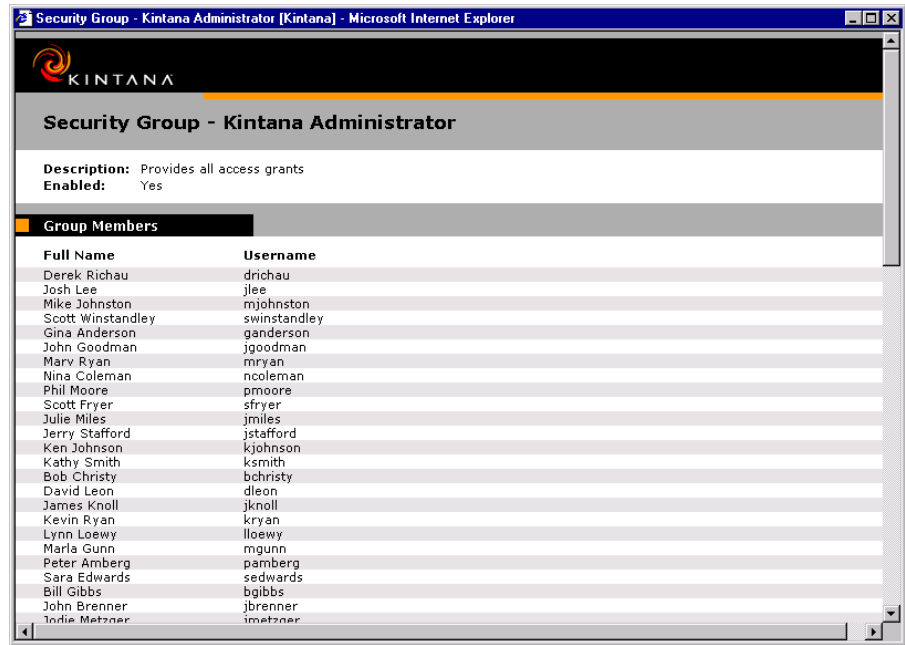
Request Status: Assigned **Description:** Adding new Report functionality to the system.

Active Workflow Steps

2 - Assign Request	Eligible since May 21, 2003; Only one user must decide (no deadline)
Decision Results	Approvers
[No Decision]	Security Group: Kintana Administrator
Completed Workflow Steps	Decision Date
1 - Review Request	Assign; Only One user needed to decide
Decision Results	Approvers
Assign	John Smith
	Decision Date
	May 21, 2003 03:29 PM PDT

Done

- Click the name of the Security Group you wish to view. The SECURITY GROUP MEMBERS page opens. This page opens the Security Group page in a new browser window and the names of all its members.

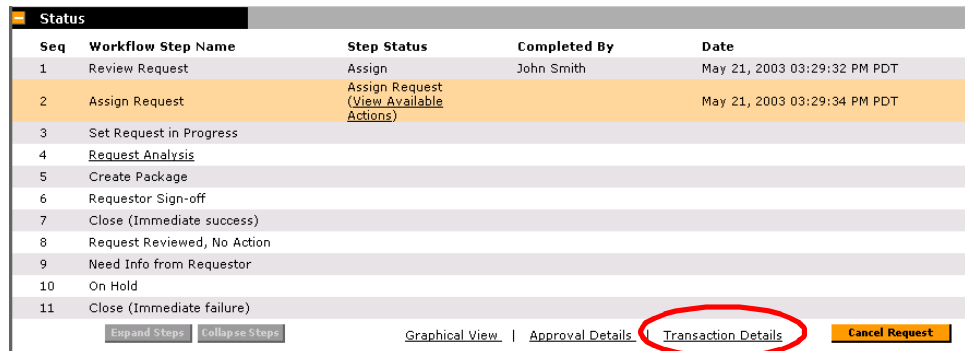


4. Click **OK** to return to the APPROVAL DETAILS page.

Viewing the Request Transaction History

To view the Request Transaction History for a particular Request:

1. Open the Request's detail page and scroll down to the STATUS region.



2. Click the **TRANSACTION DETAILS** link. The REQUEST TRANSACTION HISTORY page opens.

Date	Username	Step	Workflow Step Name	Step Status	Results	Error	Error Message	Notes
May 21, 2003 03:27 PM PDT	jsmith	1	Review Request	Eligible				
May 21, 2003 03:29 PM PDT	jsmith	1	Review Request	Complete				
May 21, 2003 03:29 PM PDT	jsmith	2	Assign Request	Eligible				

Done

3. Click **DONE** to return to the Request page.

Viewing the Request Execution Log

It is possible to view the details of the execution of a particular Request by running the Request Execution Log. To view the Request Execution Log for a particular Request:

1. Open the Request page and scroll down to the STATUS region.

Seq	Workflow Step Name	Step Status	Completed By
1	Approve Bug Fix	Approved	John Smith
2	Check Batch Version	Check Batch Version (In Progress) (Log) (View Available Actions)	John Smith
3	Create Request		

2. Click the '**LOG**' link. The REQUEST EXECUTION LOG page opens. From this page, you can view the details of the Request Execution.

Workflow Step Source	Request Type	Request	Workflow	Workflow Step	Started
Execution -Simple Execution 2	Bug	30007	Secondary Bug Process	2 - Check Batch Version	September 3, 2002 02:39:29 PM PDT

String index out of range: -1

3. Click **DONE** to return to the Request page.

Using Dashboard Portlets to View Request Information

The Kintana Dashboard enhances the interaction with your business data by providing configurable views into Kintana. Each licensed Kintana product has a number of associated portlets which can be added to a user's Dashboard.

The Kintana Dashboard can be personalized to meet the goals of a variety of users. The Dashboard can be configured to communicate expectations to all levels of Kintana users. The Dashboard provides a central location from which managers, executives and participants can view track and update their business activity statuses. *"Using the Kintana Dashboard"* provides instructions for common portlet personalization tasks and highlight a few possible portlet configurations that will provide specific advantages related to a variety of business roles.



The quickest way to locate open Requests is through your Kintana Dashboard. For example, the My Requests portlet can be used to display all of your assigned requests. The Kintana Dashboard features additional portlets that can help users manage Requests. See *"Using the Kintana Dashboard"* for more detailed information.

Chapter 6

Processing Requests

Once a Request has been submitted, it is routed along a standard business process of approvals, decisions, and actions, depending on the associated workflow. You can track and process Requests using the following procedures:

- *Request Processing - Data Integrity*
- *Locating In Progress Requests*
- *Updating Request Information*
- *Configuring Workflow Display*

Request Processing - Data Integrity

The information gathered for a business process is necessary for the Request to reach a point of resolution. While much of the information for a Request might be available at the time of initial entry, there are other pieces of information that are acquired only after the Request starts processing. Some of this data might be crucial to the resolution of the Request.

In order to make allowances for these requirements, Kintana Create incorporates the concept of conditional behavior for fields. This ensures that the correct information, according to the defined business process, is always obtained.



Example

When a Request is first entered into Kintana, it might be by a non-technical person trying to solve a technical issue. For example, a user might report a problem using a Request Type called 'SOFTWARE BUG.' At this stage, the field by the name of 'ESTIMATED TIME TO FIX' is not required and appears as black text.

However, after the user submits the Request, it proceeds to the next step and is assigned a Request Status of 'NEW.' In this step, the person working on the problem is **REQUIRED** to fill in the 'ESTIMATED TIME TO FIX' field. The (now required) field is displayed with a red asterisk by it and does not allow the technician to advance the Request to the next step of the workflow until the field is filled in.

Locating In Progress Requests

Requests are sometimes routed through a business process involving testing, various approvals and rework. Kintana Create users can locate any Requests that require their attention by:

- [Using the Search](#)
- [Using the Notifications](#)

Using the Search

You can search for Requests using the SEARCH REQUESTS page. Select **SEARCH > REQUEST** from the menu to access this page. See "[Searching for Requests](#)" on page 53 for details.

Using the Notifications

As a Request proceeds through its life, email notifications can be sent to alert users of pending actions. Notifications can be sent:

- At a specific step in the Request resolution process.
The logic regarding when emails are sent and the content for each email is defined in the Workflow. For example, 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.

- When a specific field value changes.
Certain fields on the Request Type can be configured to send a notification when a field changes to a specific value or any value. The following fields can be configured to send a notification: COMPANY, REQUEST GROUP, ASSIGNED GROUP, PRIORITY, APPLICATION, ASSIGNED TO, DEPARTMENT, SUB-TYPE, and CONTACT NAME.

Notifications typically instruct the user to review a Request or act on a pending Workflow step. Follow the instructions detailed in the notification for the appropriate course of action.

The notification may include a hyper-link to the Request. Enter this URL into your Web browser to proceed to this destination. If you are currently logged onto Kintana, the referenced Request opens. If you are not currently running Kintana, the Kintana logon page opens. After you logon, the referenced Request opens. *Figure 6-1* shows a sample notification.

New Critical Product Bug Notification [Log on to Kintana](#)

A new Critical Product Bug has been created for Common Technology:

Bug #: [118028](#)
Unit: ALL: Fields-Autocomplete
Priority: Critical
Description: value in token assigned by autocomplete list differs in workbench and html interface
Created By: lcua
Notes: Thu May 8, 2003 10:54 AM PDT Leslie Cua (lcua) wrote:
the value in a token is different in the workbench and the html interface. see steps to reproduce for details
this used to work a few weeks ago on our 5.0 instance and used to work in 4.6.

Figure 6-1 Sample Notification

Updating Request Information

In addition to creating new Requests, you can update existing Requests in Create. You can perform the following tasks:

- [Updating the Request Header](#)
- [Updating Request Details and Notes](#)
- [Updating Request References](#)
- [Updating Request Status](#)



Note

Kintana Create takes into account the status of the Request and the permissions granted the user. For Power Users, all fields are editable and Workflow Step transitions can be made. Standard Users can only add References, Notes, and make Workflow Step transitions. Whether a user can edit a Request depends on the security model for the Workflow and the Request Type. See "[Configuring a Request Resolution System](#)" for details.

Updating the Request Header

To update header information for an existing Request:

1. Open the Request.
2. Scroll down to the Request HEADER title bar.

Request Header		Save
Request No.:	30010	Request Type: Application Enhancement Change
* Department:	Finance	Sub-Type: <input type="text"/>
* Workflow:	Bug Request Type Workflow	Application: <input type="text"/>
Priority:	Critical	Assigned Group: <input type="text"/>
Assigned To:	<input type="text"/>	Request Status: New (Pending Package #30025 - 0%)
Request Group:	<input type="text"/>	* Contact Name: Ellis, Donald
* Description:	Need to access the application from off-site.	Contact Phone: 444.444.4444
		Contact Email: dellis@unknown.com

3. Enter any new Request Header field information.
4. Click **SAVE** to save your changes.

Changing the Request Type

To change the Request Type for an existing Request:

1. Open the Request.
2. Scroll down to the Request Header title bar.

Header Save

Request Header

Request No.: 30010 Request Type: Application Enhancement Change

Created By: jsmith

* Department: Finance Sub-Type:

Created On: May 21, 2003

* Workflow: Bug Request Type Workflow

Request Status: New (Pending Package #30025 - 0%)

Priority: Critical Application:

* Contact Name: Ellis, Donald

Assigned To: Assigned Group:

Contact Phone: 444.444.4444

Request Group:

Contact Email: dellis@unknown.com

* Description: Need to access the application from off-site.

- Click **Change**, located next to the Request Type field. The Change Request Type page opens.

Changing the Request Type on a Request will restart the Request process. Notes and common fields will be carried over to the new Request Type.

Change Request Type

Find: Filter

Request Type	Description
<input type="radio"/> Bug	Bug Request type
<input type="radio"/> DEM - Application Bug	Application bugs should be used to report problems in current IT applications.
<input type="radio"/> DEM - Application Enhancement	Application Enhancements should be used to request new functionality in IT current applications
<input type="radio"/> DEM - Database Refresh	Database refresh requests can be made for all IT Ops applications in the testing phase. Standard IT Ops service levels apply.
<input type="radio"/> DEM - Initiative	Initiative request should be used to request key projects for future quarters. Provided approval from key stakeholders, Initiative requests will be reviewed in the third week of each quarter.
<input type="radio"/> Enhancement	Enhancement Request type
<input type="radio"/> Generic Request	General-purpose request tracking
<input type="radio"/> PFM - Project Request	Initiative request should be used to request key projects for future quarters. Provided approval from key stakeholders, Initiative requests will be reviewed in the third week of each quarter.
<input type="radio"/> PMO - Issue	A standard Request Type for logging Issues
<input type="radio"/> PMO - Program Request	Initiative request should be used to request programs for future quarters.
<input type="radio"/> PMO - Resource Request	Standard method for submitting resource requests for new resources and changes to existing resources.
<input type="radio"/> PMO - Risk	Request type for entering risk information
<input type="radio"/> PMO - Scope Change Request	Request type for scope changes

OK Cancel

- Select the new Request Type you wish to change the Request to by clicking the appropriate radio button.

If there is a large number of Request Types present in the system, type desired filtering criteria into the **FIND** field and click **FILTER**.

- Click **OK** to change the Request's Request Type. Click **CANCEL** to return to the Request page without changing the Request Type.

Changing a Request's Request Type can change which fields are associated with that Request. To reduce data entry when the Request Type is changed, Kintana Create attempts to map the fields from the original Request Type to the fields of the new Request Type. When a match is found, the value in the original field is copied to the new field for the new Request Type. Any new fields remain blank during the change in Request Type.



Note

Information tied to the old Request Type is not lost. A copy of the Request fields before the Request Type was changed is archived for reporting or auditing purposes.

Updating Request Details and Notes

To update the details for an existing Request:

1. Open the Request
2. Scroll down to the DETAILS title bar.

The screenshot shows a web form titled 'Details' for an 'Enhancement' request. The form is organized into several sections:

- Module:** A dropdown menu with 'Module B' selected.
- Modification Type:** A dropdown menu with 'New' selected.
- Report Name:** An empty text input field.
- Program Name:** An empty text input field.
- Justification:** A text area containing 'Customer demand it.' with scrollbars.
- Duplicate ID:** An empty text input field.
- Resolution Summary:** An empty text input field.
- * Difficulty:** A dropdown menu with 'Medium' selected.
- * Estimated Time to Complete:** A text input field containing '20 days'.
- Resolution:** An empty dropdown menu.

3. Enter any new Request field information.
4. Enter any notes in the NOTES section. Up to 32K of information can be entered per Request.
5. Scroll to the bottom of the page and click **SAVE**. This saves any updates made to the Request fields or Notes.



Note

The ability to view and edit fields in a Request depend on the Request security set up during system configuration. See "[Configuring a Request Resolution System](#)" for details.

Updating Request References

References can be viewed, modified, and deleted from the Request page. The processes for performing these activities are discussed in the following sections:

- [Viewing a Reference](#)
- [Changing a Reference](#)
- [Deleting a Reference](#)

For more detailed information on adding References to a Request, see “[Adding References](#)” on page 34.

Viewing a Reference

To view a Reference:

1. Navigate to the Request’s detail page and scroll down to the REFERENCES section.
2. Click on the name of the Reference.

Changing a Reference

You can change the relationships of existing References. To modify an existing Reference relationship:

1. Navigate to the Request’s detail page and scroll down to the REFERENCES section.

References							
Pkg #	Assigned User	Description	Workflow	Status	% Complete	Relationship	Relationship Details
<input checked="" type="checkbox"/> 30013	John Flyer	Production Update - patch #1337	Dev -> Test -> Prod	In Progress	0%	Related to	Informational: Package 30013 is related to Request 30010
<input checked="" type="checkbox"/> 30025		Need to access the application from off-site.	Dev -> Test -> Prod	New	0%	Predecessor	Blocking: Action not allowed on Request 30010 until Packa...
<input checked="" type="checkbox"/> 30016	Jenny Smith	Updating Web Site	Dev -> Test -> Prod	In Progress	0%	Related to	Informational: Package 30016 is related to Request 30010

2. Choose the desired relationship from the RELATIONSHIP drop down list.
3. Click **SAVE**.

Deleting a Reference

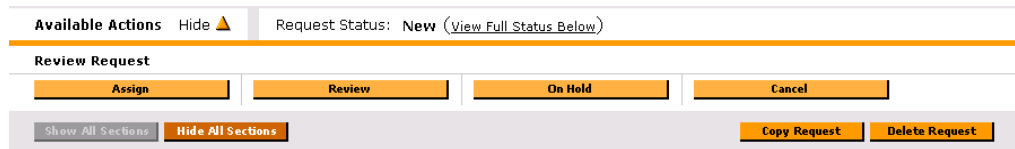
To delete an existing Reference:

1. Navigate to the Request’s detail page and scroll down to the REFERENCES section.
2. Click the next to the name of the Reference to be deleted.

Updating Request Status

To update the status of a particular Request:

1. Open the Request. Any AVAILABLE ACTIONS are displayed at the top of the page.



Click an Action button (for example, **ASSIGN**) to perform the Workflow Step it specifies.

Depending on the nature of the action, the Workflow Action page may open, presenting more detailed choices. For example, if you select the Assign transition, you may be required to specify the Assigned To user. In this case, a page would open to gather this information.

The screenshot shows a workflow action page titled 'Application Enhancement #30012: Assign'. It has a 'Summary' section with 'Request Status: New' and 'Created By: jsmith'. The 'Description' is 'Need to access the application from off-site.'. Below is an 'Action Required' section with the text 'The following fields are required or needed to be reconfirmed in order to continue: Assign'. There is a required field '* Assigned To:' with an empty input box and a user selection icon. At the bottom right are 'Done' and 'Cancel' buttons.



Workflow Actions can also be viewed from the STATUS section of the Request detail page.

Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	August 30, 2002 02:25:02 PM PDT
2	Request Assigned	Request Assigned (View Available Actions)		August 30, 2002 02:25:02 PM PDT
3	Request Analysis			
4	Create Package			
5	Requestor Sign-off			
6	Close (Immediate success)			
7	On Hold			
8	Need Info from Requestor			
9	Request Reviewed, No Action			
10	Close (Immediate failure)			

Expand Steps | Collapse Steps | Graphical View | Approval Details | Transaction Details | Cancel Request

If the user has the appropriate permissions to act on an eligible step, a **VIEW AVAILABLE ACTIONS** link appears in the STEP STATUS column. Users can then click the link to open the Workflow Action page to process their step.

Application Enhancement #30012: Review Request

Summary

Request Status: New Created By: jsmith
 Description: Need to access the application from off-site.

Action Required

Please choose an outcome for the step: **Review Request**

Assign
 Review
 On Hold
 Cancel

Notes

Done Cancel



Subworkflow Steps found within a Workflow are displayed sequentially along with the other Workflow Steps. Subworkflow steps are numbered with additional decimal places corresponding to the level of the Workflow. For example, if Step 3 of a top-level Workflow is a Subworkflow, its steps will be displayed as 3.1, 3.2, 3.3, etc. Similarly, if the second step in that Subworkflow is also a Subworkflow step, its steps will be displayed as 3.2.1, 3.2.2, 3.2.3, etc.



Approval details can be shown for Workflow Steps that require more than one decision, as well as Security Groups that can act on a particular step. For more information, see [“Viewing the Approval Details of a Step”](#) on page 66.

Delegating a Decision

For situations where you feel someone else may be better equipped to make a decision, Workflow Steps that require an 'APPROVE ALL' or 'AT LEAST ONE' decision allow you to delegate that decision to another Kintana user.

If the step is configured to all the decision to be delegated, an appropriate Action button appears.



Click the step for delegating the decision to open the following window.

The dialog window has a title bar "Application Enhancement #30012: Approve (All Users)". It contains several sections: "Summary" with "Request Status: Assigned" and "Created By: jsmith", and "Description: Need to access the application from off-site."; "Action Required" with the instruction "Please choose an outcome for the step: Approve (All Users)" and a "Delegate To:" field with a user selection icon; and "Notes" with a large text area. At the bottom right are "Done" and "Cancel" buttons.

Bypassing a Decision or Execution

From time to time, it may be necessary or desirable to bypass a Decision or Execution step.

If the step is configured to allow a bypass, a new radio button choice or auto-complete field will appear in its WORKFLOW ACTION page.

Bug #30004: Approve Bug Fix

Summary

Request Status: Not Submitted **Created By:** johnsmith
Description: New version incompatible with OS

Action Required

Please choose an outcome for the step: **Approve Bug Fix**

Approved
 Not Approved
 Bypassed

Notes

Done Cancel

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To bypass a Decision or Execution,

1. Open the Request.
2. Click the appropriate **ACTION** button in the AVAILABLE ACTIONS section, or scroll down to the STATUS section and click the name of the Execution Step.
3. Select 'BYPASS' and click **DONE**.

If you are bypassing an execution step, the Workflow Action page will change, and ask you to specify a result for the bypassed execution. Select the desired outcome and click **DONE**.

Scheduling an Execution

Execution Workflow Steps can be scheduled in Kintana Create. To schedule an Execution:

1. Navigate to the desired Request's detail page.
2. Click the **SCHEDULE EXECUTION** button in the AVAILABLE ACTIONS section, or scroll down to the STATUS section and click the name of the Execution Step. The following page opens.

The screenshot shows a dialog box titled "Execute Request Commands" with three buttons: "Execute Now", "Schedule Execution", and "Bypass Execution". The "Schedule Execution" button is highlighted with a red dashed box and a red arrow pointing down to the "Schedule Execute Request Commands" section of a request form. The form is titled "Application Enhancement #30014: Execute Request Commands" and contains the following sections:

- Summary**
 - Request Status: Assigned
 - Description: Need to access the application from off-site.
 - Created By: jsmith
- Schedule Execute Request Commands**
 - Execution Date/Time: May 22, 2003 05:21:45 PM F
- Notes**
 - A text area for entering notes.

At the bottom of the form are "Done" and "Cancel" buttons.

3. Enter the date and time for the Execution in the EXECUTION DATE/TIME field and any NOTES.
4. Click **DONE**.

The Execution will run at the scheduled time.

Overriding Reference Relationships

Reference relationships in Kintana make it possible for a Request to wait for other Requests to finish processing before making any progress. Occasionally, it may be necessary or desirable to override such a relationship, enabling processing on a Request to continue regardless of References to other Requests.

To override a Reference relationship:

1. Open the Request.
2. Click **OVERRIDE**, next to the REQUEST STATUS at the top of page.



Note

The **OVERRIDE** button will only appear if you have the proper access grants to override the Reference relationship.

Application Enhancement - #30014

Description: Need to access the application from off-site.

No Available Actions Request Status: Assigned (Pending Request #30011 - 0%) (View Full Status Below) **Override**

The Request will proceed along its Workflow normally. The REFERENCE RELATIONSHIP details in the REFERENCES section is updated to show that the relationship has been overridden.

Spawning a New Request from a Request

In the process of resolving a Request, a new issue may come up that needs attention, requiring the creation of a new Request. The new Request is then used to process and resolve the new issue. New Requests can be created from an existing Request in two ways:

- **From the References section of the Request Detail page at any time** — For more detailed information on creating a new Request from the References section, see [“Creating a Request from the References Section”](#) on page 32.
- **At a pre-defined Workflow Step** — Kintana Request Workflows can be configured so that they generate a Kintana Request at specific points in the Request resolution process.

To create a new Request at a pre-configured step in the resolution process:

1. Click the **CREATE REQUEST** button or the appropriate link in the STATUS section.

Create Request

Create Request **Bypass Creation**

The following page opens.

Application Enhancement #30014: Create Request

Summary

Request Status: Pending Requestor Info **Created By:** jsmith

Description: Need to access the application from off-site.

Action Required

*Request Type

Create **Cancel**

2. Select a Request Type from the REQUEST TYPE field and click **CREATE**. The Request Submission page opens.
3. Fill in all appropriate fields.

At this point, the new Request has been created but not submitted.

4. Submit the new Request by clicking **SUBMIT**.

This moves the CREATE REQUEST step of the original Request to a step status of SUCCESSFUL. The new Request is referenced as the child of the original Request.

Users can then view the details of the Request in the newly created Request's STATUS section. Overall Request information can also be viewed from the References section of the original Request.

Creating a New Package From the Request

Kintana Create is tightly integrated with Kintana Deliver, providing a closed loop system for Requests that might require software changes. In the process of resolving a Request, you may need to deploy some code using a Kintana Package. From the Request, you can create a Package in one of two ways:

- **From the References section of the Request Detail page at any time** — For more detailed information on creating a new Package from the REFERENCES section, see [“Attaching Packages”](#) on page 37.
- **At a pre-defined Workflow Step** — Kintana Request Workflows can be configured so that they generate a Kintana Package at specific points in the Request resolution process.

To create a new Package at a pre-configured step in the resolution process:

1. Click the **CREATE PACKAGE** button or the appropriate link in the **STATUS** section.

Application Enhancement - #30010

Description: Need to access the application from off-site.

Available Actions Hide ▲ Request Status: In Progress ([View Full Status Below](#))

Create Package

Create Package Bypass Creation

The window refreshes to display the **NEW PACKAGE** page. Matching header information is defaulted in the Package page, such as Description, Priority, and Package Type.

New Package 30026 Save Cancel

*Package No.: 30026 Package Group: Created By: jsmith
 Description: Need to access the application from off-site. Created On: May 23, 2003
 *Workflow: Status: New
 Assigned User: jsmith *Priority: Critical Parent: Request 30010
 Assigned Group: *Package Type: Customization *Priority Seq: 50
 Percent Complete: 0

Status

View: All Lines Go
 Seq Object Name Object Type
 This package does not have any Lines to show.
 Check All Clear All Line Details Check All Clear All Workflow Action

Notes

Notes to be added on save:

References

Reference Additions
 New Reference: Attachment Add
 References to be added on Save:
 Open Remove

Save Cancel

2. Enter any additional **HEADER** information or **NOTES** and click **SAVE**. Note that you can not add Package Lines using the standard Kintana interface. You must add Package Lines using the Kintana Workbench. See "[Processing Packages](#)" for details.

Once the Package is completed, it automatically sends its final state (Closed - Success, Closed - Failed, Closed - Mixed, Cancelled) back to the Request. The Request then uses this final state as the result for the CREATE PACKAGE Workflow Step and moves forward based on the given Workflow definition.

Re-Opening Closed Requests

A Request can be re-opened at a pre-configured step in the process. For example, if a bug Request is generated which is subsequently closed and the bug reoccurs, the Request can be re-opened instead of creating or copying a new one.

Only the following users can re-open a Request:

- Kintana Create Managers
- Creators of the Request
- Assigned Users
- Members of the Assigned Group
- Members of one of the Groups authorized to act on the Workflow

To re-open a Request:

1. Open the page for the closed Request that you would like to re-open.
2. Click **REOPEN REQUEST**.

Status				
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	May 22, 2003 05:20:24 PM PDT
2	Assign Request	In Progress	John Smith	May 22, 2003 05:20:28 PM PDT
3	Set Request in Progress			
4	Request Analysis	No Code Change	John Smith	May 22, 2003 06:25:47 PM PDT
5	Create Package			
6	Requestor Sign-off	Approved	John Smith	May 22, 2003 06:25:51 PM PDT
7	Close (Immediate success)	Succeeded	John Smith	May 22, 2003 06:25:51 PM PDT
8	Request Reviewed, No Action			
9	Need Info from Requestor	Information Returned	John Smith	May 22, 2003 06:25:29 PM PDT
10	On Hold			
11	Close (Immediate failure)			
12	Execute Request Commands	Failed	John Smith	May 22, 2003 06:00:22 PM PDT
13	Approve (All Users)			
14	Create Request	Failed	John Smith	May 22, 2003 06:25:11 PM PDT

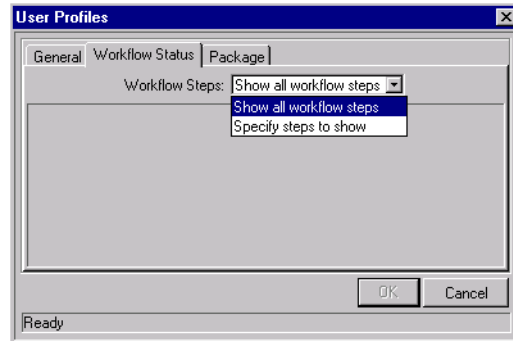
[Expand Steps](#) | [Collapse Steps](#) | [Graphical View](#) | [Approval Details](#) | [Transaction Details](#) | **Reopen Request**

Configuring Workflow Display

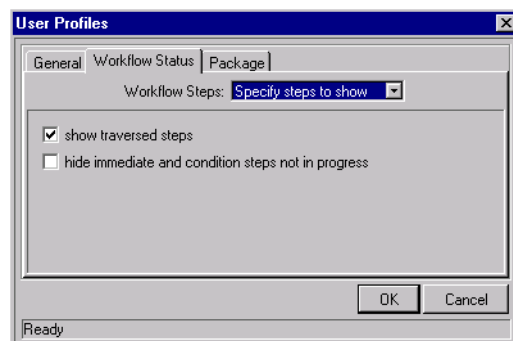
Users with a Power license can launch the Kintana Workbench and configure which Workflow Steps in the STATUS section are displayed. This is configured in the USER PROFILE.

To configure which steps are displayed in the Request status section:

1. Select **ADMINISTRATION > OPEN KINTANA WORKBENCH**.
2. Select **EDIT > USER PROFILES** from the menu. The USER PROFILES window opens.
3. Click the **WORKFLOW STATUS** tab.



4. In the WORKFLOW STEPS drop down list, choose either to show all of the Workflow Steps or to limit the display of Workflow Steps. If you choose **SPECIFY STEPS TO SHOW**, the following options are available:



- o SHOW TRAVERSED STEPS - Choose whether or not to see steps that have been completed and are no longer active.

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

Chapter 7 Managing Requests

In Kintana Create, users define and submit Requests through an automated business process. Kintana Create also lets you manage Requests by:

- Viewing them at any time
- Changing the information when necessary
- Deleting or cancelling Requests
- Running pre-defined reports that display the Request's current status

To learn more about these tools for managing Requests, see the following sections:

- [*Deleting Requests*](#)
- [*Canceling Requests*](#)
- [*Using Reports to Manage Requests*](#)
- [*Using the Kintana Dashboard to Manage Requests*](#)

Deleting Requests

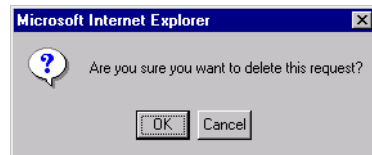
Requests can be deleted from Kintana. In order for a user to delete a Request, the user must have the CREATE: MANAGE REQUESTS ACCESS GRANT. Only saved Requests can be deleted.

To delete a Request:

1. Open the Request.

2. Scroll to the bottom of the Request's detail page. If you have the appropriate permissions to delete the Request, you will see the **DELETE** button.
3. Click **DELETE**.

A dialog box opens that prompts you to confirm that the Request should be deleted.



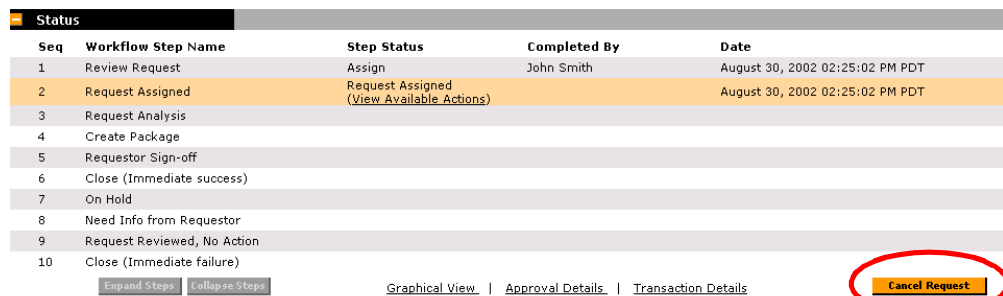
4. Click **OK** to delete the Request.

Canceling Requests

Requests can be canceled from Kintana. In order for you to cancel a Request, you must have the **CREATE: MANAGE REQUESTS Access Grant** and be eligible to act on the current **Workflow Step** by belonging to the **Step's Security Group**. Only submitted Requests can be cancelled.

To cancel an existing Request:

1. Open the Request.
2. Scroll down to the **Status** section and click **CANCEL REQUEST**.



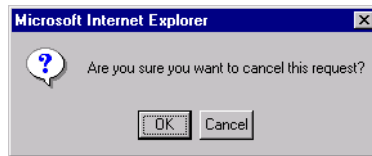
Seq	Workflow Step Name	Step Status	Completed By	Date
1	Review Request	Assign	John Smith	August 30, 2002 02:25:02 PM PDT
2	Request Assigned	Request Assigned (View Available Actions)		August 30, 2002 02:25:02 PM PDT
3	Request Analysis			
4	Create Package			
5	Requestor Sign-off			
6	Close (Immediate success)			
7	On Hold			
8	Need Info from Requestor			
9	Request Reviewed, No Action			
10	Close (Immediate failure)			

Expand Steps Collapse Steps

[Graphical View](#) | [Approval Details](#) | [Transaction Details](#)

Cancel Request

A dialog box opens that prompts you to confirm that the Request should be canceled.



3. Click **OK** to cancel the Request. This cancels each Workflow Step and sets the Request Status to CANCELLED.

Using Reports to Manage Requests

Kintana Create features a pre-defined set of HTML-based Reports that can be accessed using a Web browser. The Reports provided with Kintana Create display current detailed status of the Request's activity at any point in time. The following reports will help track and manage your Requests.



Note

The reports listed in this section are defined in greater detail in "[Kintana Reports](#)". See this document for detailed information on the Report screens and extended functionality.

Resource Load Report by Priority

The Resource Load Report by Priority lists open Requests assigned to users based on the filtering criteria that is entered. The report lists the Request count per priority as well as the average age (from Request creation) of the Requests in each priority bucket.

Request Detail Report

The REQUEST DETAIL Report is the primary report in Kintana Create. It reports on Requests by a large number of selection criteria. For each Request, the report can display:

- All the notes and/or References attached to the Request
- The current status of the Request
- A listing of transacted steps
- All the populated detail fields for the Request

For example, use this report to see Requests assigned to you or Requests ready for your review. Or use it to see all new Requests that need to be tracked. The query fields for this report let you select only the desired Requests.

Request Summary Report

The REQUEST SUMMARY Report offers the same ability to choose selection criteria as the REQUEST DETAIL report, but provides the total counts for groups of Requests matching the selection criteria. Categorize and group selected Requests and get the counts for each group. For example, you can obtain the total number of Requests created by a user, grouped by Priority, Workflow, and Application.

Report Parameters

Report Name: Request Summary Report
 Run Date: May 7, 2002 04:34 PM PDT

Request From: Department:
 Request To: Application:
 Request Type: Request Group:
 Created By: jsmith Company:
 Assigned to User: Description Contains:
 Assigned to Group: Request Status:
 Priority: Creation Date From:
 Group By: Priority,Workflow,Application Creation Date To:
 Include Closed Requests: Y Last Modified Date From:
 Include Subtotals: Y Last Modified Date To:
 Include Group Totals: Y

Priority	Workflow	Application	Count
Critical	Application Enhancement	Common Technology	1
Critical	Application Enhancement	Security & Configuration	1
Critical	LL-My Bug Request-Layout		1
Critical	Product Bug Workflow	Security & Configuration	1
Subtotal for Critical			4
High	Application Enhancement (2)	Common Technology	1
High	Application Enhancement (2)		2
Subtotal for High			3
Normal	Application Enhancement	Common Technology	1
Normal	Application Enhancement	Product Delivery	1
Normal	Application Enhancement	Security & Configuration	1
Normal	Application Enhancement (2)	Product Documentation	1
Normal	Product Bug Workflow	Security & Configuration	1
Normal	Product Enhancement	Security & Configuration	1
Subtotal for Normal			6
	Application Enhancement (3)	Common Technology	1
	Application Enhancement (3)	Security & Configuration	1
Subtotal for Null			2
Total Number of Requests			15

Figure 7-1 Sample Request Summary Report Grouped by Priority, Workflow, and Application



You can group Requests by up to five categories.

Submitting a Report

For information on submitting a Request specific report, refer to “[Kintana Create Reports](#)” on page 95.

Using the Kintana Dashboard to Manage Requests

The Dashboard provides a powerful tool for managing your Kintana Create Requests. From the Dashboard, managers can quickly view all incoming Requests and assign them to team members. They can also configure additional portlets to monitor the Request activity based on the assigned to user, priority or Request Type.

For more detailed information, see "[Using the Kintana Dashboard](#)".

Chapter 8

Kintana Create Reports

Kintana Create features a pre-defined set of HTML-based reports that are accessed through a Web browser. The reports provided with Kintana Create 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 Create also allows users to build their own reports.

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

- *“Kintana Reports Overview”* on page 95
- *“Processing Kintana Reports”* on page 101

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 Create:

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

Standard Reports

The standard reports that ship with Kintana Create 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 CREATE OR ALL PRODUCTS**.

Table 8-1. Standard Kintana Create Reports (Non-DSS)

Report	Description
Contact Detail Report	Queries the Contacts entered in your Kintana Create system as you enter and update Requests.
Contact Synchronization Report	Provides an interface for ensuring that the Create contacts are properly defined. This report can detect all Kintana users with no corresponding contact record and then create a contact record for them. This report also searches for and corrects discrepancies between the contact and user information within the Kintana system.
Notification History Report	Workflow report that lets you view notifications that have been sent or are pending. It contains such information as: Notification Date, Entity Type, Subject of the Notification, and Recipient List.
Portlet Detail Report	This is a System Administrator Report used to return the details of a Portlet or range of Portlets. It lists the Portlet's columns, as well as the SQL query used by the Portlet to retrieve data from the system. The Portlet's filter fields and security configuration can also be listed.
Report Type Detail Report	Displays the parameters and parameter details for each Report Type. It also displays the exact commands used to run the report.
Request Detail (Filter by Custom Fields) Report	Similar to the Request Detail Report except that you can filter for Requests by values in custom fields. Specify the particular Request Type to report on, select up to four of the custom fields for that Request Type and run the report for specific values for each of those fields.
Request Detail Report	Displays Requests based on a large number of selection criteria.
Request Header Type Detail Report	Administration report that lists the detailed set-up information for the Request Header Types. This report can be used to audit your set-up as well as help debug any problems with Requests using a given Request Header Type. You can also display information about field filters that have been selected for the Assigned To, Assigned Group and Contacts fields.

Table 8-1. Standard Kintana Create Reports (Non-DSS)

Report	Description
Request History Report	Lists the complete Workflow and field change history for each selected Request. The report provides details of every change in the status of each Workflow Step for selected Requests.
Request Listing Report	Provides a useful interface for viewing selected Request information. It lets you select various fields for inclusion or exclusion and specify the desired display order. The Request Listing Report can also be used to export data to MS Excel or another data analysis tool. This report's output is formatted as an HTML table that can be copied and pasted from your Web browser into the data analysis tool.
Request Quick View Report	Lists a quick summary of open and closed Requests, breaking down the Requests by priority. The report also shows the Request activity for the current week (using a Sunday to Saturday week) in regards to Requests opened and Requests closed. The report can also show selected Request information for each of the individual open Requests, allowing managers to see both a summary view on Request activity and one level down in Request detail.
Request Summary (Filter by Custom Fields) Report	Similar to the Request Summary Report except that you can filter for Requests by values in custom fields. Once the Request Type to report on is specified, select up to four of the custom fields for that Request Type.
Request Summary Report	Gives the total counts for groups of Requests matching the selection criteria. You can categorize/group selected Requests in as many as five categories and get the counts for each group.
Request Type Detail Report	Administration report that lists the detailed set-up information for your Request Types. This report can be used to audit your set-up as well as help debug any problems with Requests of a given Request Type. You can also display information about which Security Groups are allowed to create Requests of a specific Request Type, and which Workflows can be used in a specific Request Type.
Resource Load Report by Priority	Lists all open Requests assigned to different users based on the filtering criteria that you select. The report lists the Request count per priority as well as the average age (from Request creation) of the Requests in each priority bucket.
Security Group Detail Report	Lists set-up information for a single Security Group or a group of Security Groups. It displays such information as which users belong to the group, what Workflow Steps the Security Group has access to, and what screens the users in the Security Group can update. The report can also display which entities can use a Security Group's information in its search fields, and which Request Types that members of a designated Security Group are allowed to create.

Table 8-1. Standard Kintana Create Reports (Non-DSS)

Report	Description
Special Command Detail Report	This report lists details for a special command, or a range of special commands.
User Data Detail Report	The User Data Detail report displays the definition of each custom User Data field. The report is grouped by entity and lists all the custom fields for each entity. It also lists referenced validations for the fields.
User Detail Report	Lists the users defined in your Kintana system, licensing information for the user and the Security Groups description attached to each user.
Validation Report	Administration report on the various custom Validations. These can be Validations that you entered into the system or those that are standard with Kintana products.
Workflow Detail Report	Displays the complete definition of a specific Workflow or a set of Workflows. This report is useful for auditing and analyzing Workflow business process, user data, Subworkflows, Workflow Step commands and expanded Special Commands.
Workflow Statistics Report	Provides statistical information regarding the usage of the Workflow.



Note

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 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 Request 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 Requests 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 Create.

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

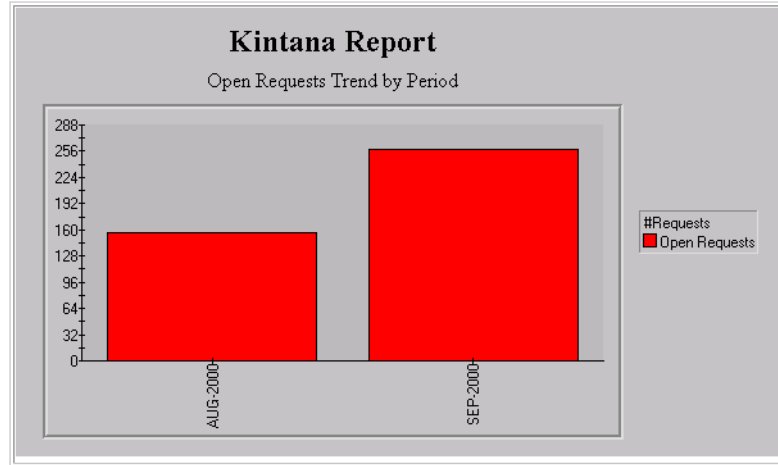
Every DSS report provides a graphical summary of Request transaction-level data. Many reports display data over a specified time range (weeks, months or years). Others display information by Workflow or Environment. Report parameters can be specified to further refine the data retrieved by the reports.

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 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 below in *Figure 8-1*.



Parameters used in chart	
Parameter	Value
Period Type	Month
Chart Type	Bar
Start Date	01-AUG-2000
End Date	29-SEP-2000
Department	Development

[Summary Data HTML File](#)

[Summary Data Text File](#)

Last Update:09/26/2000 16:20:09

Figure 8-1 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. This link allows users to download a file that can easily be imported into Excel or any other application for further analysis. All of the parameters used when submitting the report are also displayed.

DSS Reports in Kintana Create

The DSS reports that ship with Kintana Create 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 8-2. Kintana Create DSS Reports

DSS Report	Description
Request Cycle Time Distribution	Displays the distribution of Request cycle times in user-specified time buckets. The duration is specified in days. This report is useful in identifying the typical cycle times for Requests in a specific Workflow. It can also be used to identify incorrect data points.
Requests Closed By Period	Displays the number of Requests that have been closed or canceled per time unit (week, month or year) over a specified time span. The option is available for specifying a particular Workflow, or compiling composite data for all Workflows. This report allows an organization to judge its overall throughput, and identify trends in activity.
Requests Submitted by Period	Displays the number of Requests that have been created during a particular time period. The results can be divided into specific time units (week, month or year). You have the option of running the report for a specific Workflow or for all Workflows. The purpose of this report is to identify increases or decreases in the quantity of pending Requests within your organization and to assess the causes of these trends.
Requests Summary	Displays the number of Requests that have been completed. They are grouped based on a variety of Request information including Request Type, Request Group, and Request Status.
Open Requests Trend by Period	Indicates the number of Requests that were open during the specified time period, with results reported by the specified time unit. This report can be run for one or all Workflows. Using this report, managers are able to identify the overall Request workload during a certain time period.
Pending Workflow Steps	Displays the number of Requests for a specific Workflow at each status level. The report displays each status in the format Step Name - Status. Specify the Workflow, time period and the user for the report.

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 **CREATE** 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.

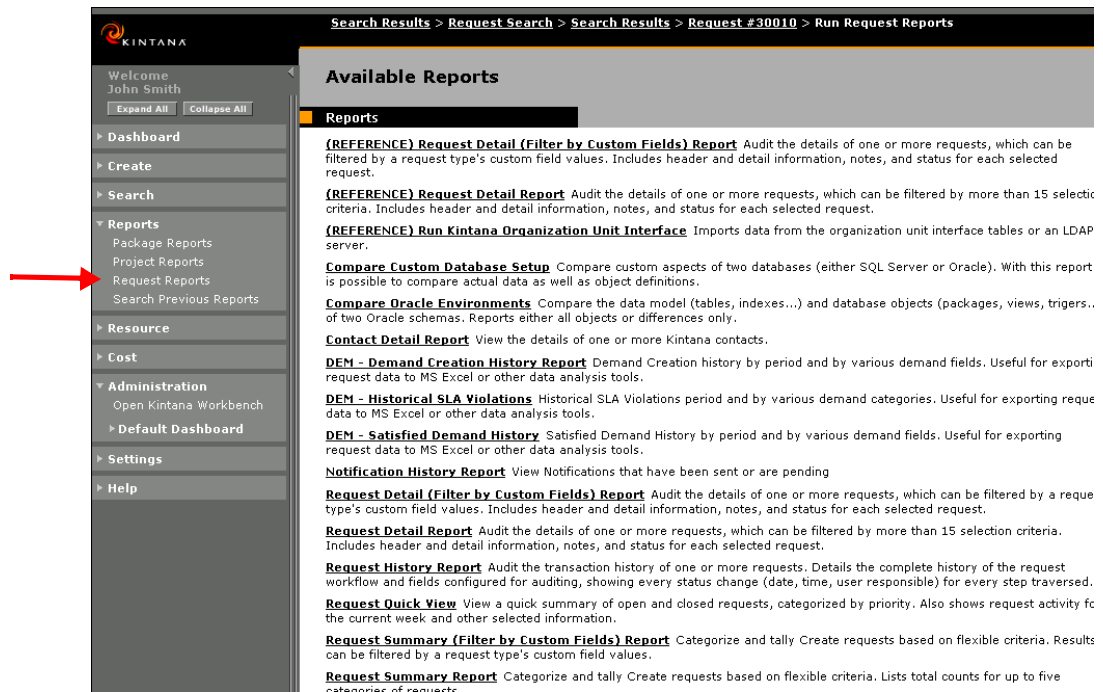
4. Fill in all the required parameters (as indicated by the red field label) and any optional parameters for the report.
5. (Optional) Set up the schedule for running the report:
 - a. Click the **SCHEDULING** tab and specify when the report is to be run. If no scheduling information is entered, the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

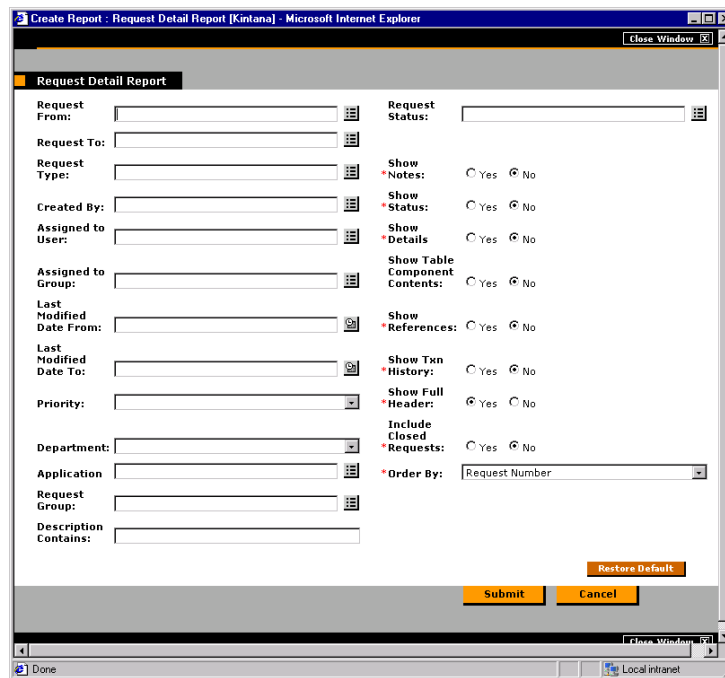
Submitting a Report from the HTML Interface

Kintana 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 > REQUEST REPORTS**. The **AVAILABLE REPORTS** page opens.



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 REQUEST 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

Integrating Requests and Projects

The Kintana Product Suite lets you integrate issue tracking with project management using Kintana Create and Kintana Drive. Kintana Create Requests and Kintana Drive Projects and Tasks can be linked to each other through a variety of dependent and informational relationships. Utilizing these relationships, Requests can be folded seamlessly into a scalable framework of interlocking initiatives. Linking Tasks to Requests from Kintana Create also gives instant visibility to detailed activities supporting an overall project.

Kintana Drive - A Project Management System

Kintana Drive enables collaborative project management for both repetitive projects, such as installing a new release of your HRMS applications, and one-time projects, such as developing a new e-commerce capability. With Kintana, you accelerate project delivery while reducing your project costs.

Kintana Create - A Request Resolution System

Kintana Create is a Workflow-driven Request resolution system for business applications. It allows you to effectively capture, route and resolve business Requests.

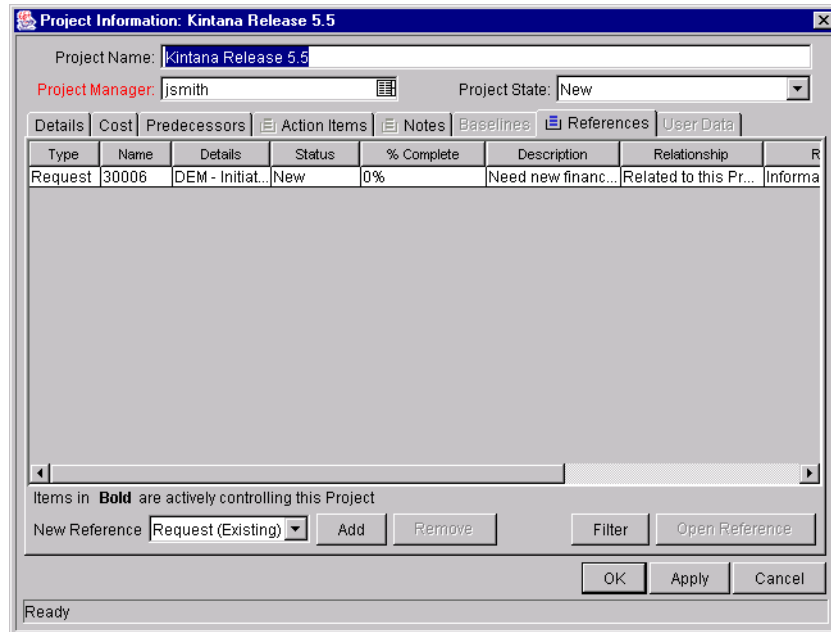
Integration

Companies with both Kintana Create and Kintana Drive can create processes that take advantage of each product's functionality. The following sections provide some background for setting up this interaction and illustrate the most common user processing events:

- *“Referencing Requests from Projects”* on page 108
- *“Creating Tasks from Requests”* on page 108
- *“Dependencies Between Tasks and Requests”* on page 110
- *“Visibility into Tasks and Requests”* on page 115

Referencing Requests from Projects

Requests can be linked to Projects through an informational Reference relationship. This is done from the **REFERENCES** tab in the PROJECT INFORMATION window in the Workbench, or from the REFERENCES section of the PROJECT DETAIL page in the Kintana interface.



Creating Tasks from Requests

Occasionally, a Request may be filed by a user that would be desirable to make into its own Task in a Drive Project, creating for it deliverable dates and trackable actuals. Tasks can be created from Requests in the Kintana Drive Workbench. A Task created from a Request behaves like any other Task in the Project, save for that the Tasks's % COMPLETE and STATE are automatically updated by the originating Request as it moves through its Workflow. The new Task has the dependency relationship TASK UPDATED BY REQUEST.

Example

A manager in a software company wants to create a Project that will track all of the bugs currently logged against a particular product. In the Kintana Workbench, he can search for bug Requests related to the product, and turn them into Tasks in the Project Plan. From there, he can perform any typical Project action, such as tracking the completion dates for each Task or monitoring triggered Exceptions.

Note

You must be in the Kintana Drive Workbench in order to create a Task from a Request.

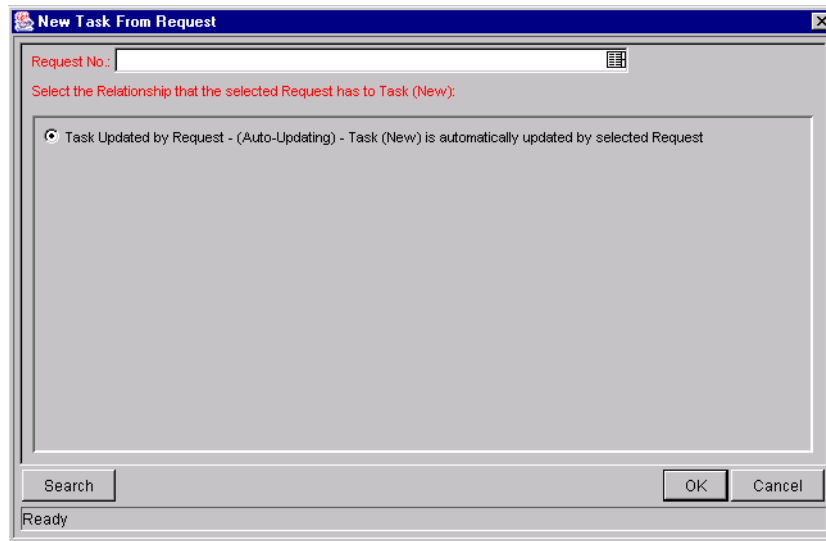
To create a Task from a Request:

1. Open or the Project in Drive.
2. From the PROJECT window, select **TASK CREATED FROM REQUEST** from the drop down list at the bottom left corner of the window.

The screenshot displays the Kintana Workbench interface for a project named 'Blackberry Rollout'. The main window is divided into a task list on the left and a Gantt chart on the right. The task list has columns for 'Seq', 'Name', 'State', 'Sched Duration', and 'Sched Start'. The Gantt chart shows a timeline from May to July 2003 with various task bars and dependencies. At the bottom left, a dropdown menu is open, showing options: 'Task Created From Request', 'Task', 'Project Created From Template', and 'Task Created From Request'. The 'Task Created From Request' option is highlighted, and the 'Add' button next to it is circled in red.

Seq	Name	State	Sched Duration	Sched Start
1	Blackberry Rollout	Active	31.0	5/26/03
2	I. Requirements Analysis	Ready	3.0	5/26/03
3	II. Solution Design	Pending Predec...	3.0	5/29/03
4	III. Prototype	Pending Predec...	5.0	6/3/03
5	IV. User Acceptance	Pending Predec...	5.0	6/10/03
6	Commit to Project	Pending Predec...	0.0	6/17/03
7	V. Detailed Design	Pending Predec...	3.0	6/17/03
8	VI. Build	Pending Predec...	6.0	6/20/03
9	VII. Test	Pending Predec...	3.0	6/30/03
10	VIII. User Signoff	Pending Predec...	1.0	7/3/03
11	IX. Train Users	Pending Predec...	2.0	7/4/03
12	Go Live	Pending Predec...	0.0	7/8/03

3. Click **ADD**. The New Task From Request window opens.



4. To select the Request to attach, use one of the following methods:
 - Select a Request number from the REQUEST NO. field.
 - Click **SEARCH** to search for Requests to add in a separate query window.
5. Click **OK** to create the new Task and close the window.

The new Task has been created from the selected Request and is part of the current Project. The Task is linked to the Request.

Dependencies Between Tasks and Requests

The dependencies that can be created between Requests and Tasks are described in [Table A-1](#).

Table A-1. Dependency Relationships: Requests to Tasks

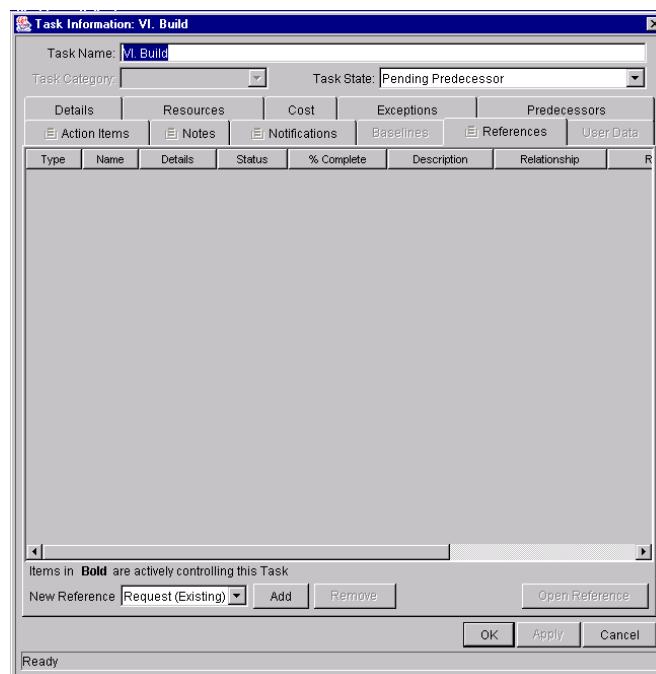
Relationship	Description
Related to this Task	(Informational) - Selected Request is related to the Task.
Successor	(Blocking) - Action not allowed on selected Request until the Task closes.
Predecessor	(Blocking) - Action not allowed on the Task until the selected Request closes.

Relationship	Description
FF Predecessor	(Finish Finish Predecessor: Blocking) - The Task and Request complete together.
Task Updated by Request	(Auto-Updating) The Task is automatically updated by the selected Request.

For more detailed information on using these dependencies, see *“Making Tasks Dependent on Requests”* on page 111 and *“Making Requests Dependent on Tasks”* on page 114.

Making Tasks Dependent on Requests

When selecting dependencies between Tasks and Requests, there are many relationships to choose from. These relationships are set by attaching a Request to a Task as a Reference. This is done from the **REFERENCES** tab in the TASK INFORMATION window in the Workbench, or from the REFERENCES section of the TASK DETAIL page in the HTML interface.



References							
Projects/Tasks							
Name	Project Manager/Resource	Master project	State	% Complete	Relationship	Relationship Details	
✖ (Request No.: 300...		Kintana Release 5.5	Updated By Request	0%	FF Predec...	Auto-Updating: Task 30587 is automatically updated by Req...	

Figure A-1 References Tab and References Section for Tasks

The following sections contain more detailed information on dependencies for Tasks created from Requests:

- [“Task Waits on Request Closure \(Successor Relationship\)”](#) on page 112
- [“Task Can’t Complete Until Request Closes \(FF Predecessor\)”](#) on page 112
- [“Task Auto-Updated by Request”](#) on page 113

Task Waits on Request Closure (Successor Relationship)

This Relationship dictates that the Task state cannot change until the associated Request is closed. The Task will immediately move into a "Pending Request" state. When the Request is closed, the Task may be acted upon once more. This does not stop other fields from being edited.



Example

A software company’s Support Division makes the decision that no patches will be released without accompanying documentation. The company has an unfortunate history, however, of changing its mind about patches that are to be released, and numerous times there have been documentation changes made to accommodate patches that were cancelled after being initially approved. Patch A’s approval Request is moving through its resolution process in Create. The Documentation team is ready to begin making changes to all documents to account for Patch A, and has created a Project in Drive. The Project includes the Task ‘BEGIN DOC CHANGES FOR PATCH A.’

The Documentation Team’s manager creates a Reference to Patch A’s Request from the BEGIN DOC CHANGES FOR PATCH A Task, with the relationship ‘SUCCESSOR.’ This way, the Task cannot be moved from its status of ‘READY’ to ‘IN PROGRESS’ until Patch A’s approval Request is closed, ensuring that the documentation changes are valid and needed.

Task Can’t Complete Until Request Closes (FF Predecessor)

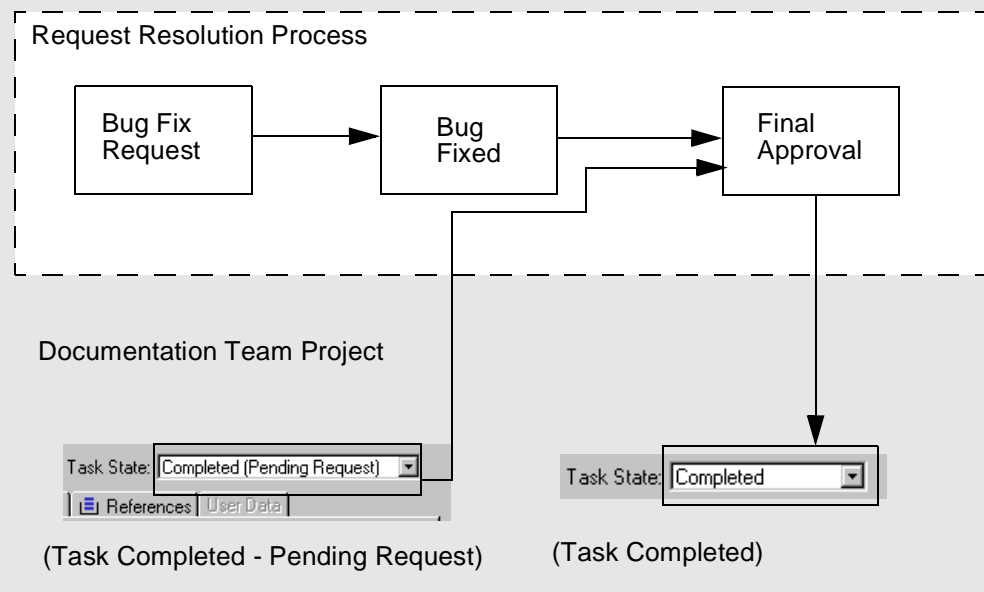
This Relationship dictates that the Task state cannot change to ‘COMPLETE’ until the associated Request is closed. When the Resource working on the Task is finished with it, and the State is set to ‘COMPLETED’ (% Complete will be set to 100%), this Task will move into a ‘COMPLETED (PENDING REQUEST)’ state. When the Request is closed, the Task is then set to ‘COMPLETED.’ This does not stop other fields from being edited.



Example

A software company's Support Division makes the decision that no patches will be released without accompanying documentation, including bug fixes. The Documentation Team wants to make sure that its documentation is accurate and complete for every bug fix that takes place. The last step in the company's bug fix resolution process is a review by the person who originally filed the bug. A Request to fix Bug 62547 has been filed and nearly completed, necessitating changes to the documentation.

The Documentation Team has a Project in Drive, one of whose Tasks is 'DOC CHANGES COMPLETE.' The Documentation Team manager creates a Reference to Bug 62547's Request, with the relationship 'FF PREDECESSOR.' This way, the Task cannot be fully completed until Bug 62547's fix has been approved by the Requestor, closing the Request



Task Auto-Updated by Request

This Relationship is for Tasks created from Requests. As the Request moves through its process, it will update the Task with its status information. When the Request is submitted, the Task moves to 'IN PROGRESS.' When the Request is completed, the Task is 'COMPLETE.' When the Request is cancelled or deleted, the Task is cancelled. A single Request may drive multiple tasks. If the Request's Workflow has % Complete values defined, the Request will also update the Task with % Complete information.



Note

Since % COMPLETE and TASK STATE are automatically updated by the driving Request(s), users cannot update these two fields. The text “(UPDATED BY REQUEST)” will be appended to the READY and IN PROGRESS states to indicate this.

Making Requests Dependent on Tasks

Requests can be made dependent on Tasks. This is done from the REFERENCES section of the Request page in the HTML interface.

References							
Projects/Tasks							
Name	Project Manager/Resource	Master project	State	% Complete	Relationship	Relationship Details	
<input checked="" type="checkbox"/> (Request No.: 300...		Kintana Release 5.5	Updated By Request	0%	FF Predecessor	Auto-Updating: Task 30587 is automatically updated by Req...	

Figure A-2 References Tab and References Section for Requests

The following section contains more detailed information on dependencies for Requests set by Tasks:

- [“Request Waits on Task Closure \(Predecessor\)”](#) on page 114

Request Waits on Task Closure (Predecessor)

This Relationship dictates that the Request’s user cannot perform any Workflow Actions until the associated Task is closed (completed, bypassed, or cancelled). The Request will immediately move into a ‘PENDING TASK’ status. When the Task is closed, the Request may be acted upon once more. This does not stop other fields from being edited.



Example

A software company’s Support Division makes the decision that no patches will be released without accompanying documentation. The Documentation Team wants to make sure that any patch Request won’t close until the patch documentation is finished. A Kintana Create user is assigned a Request going through the company’s patch approval/release process. At the same time, the Documentation Team has a Project in Drive, one of whose Tasks is ‘PATCH DOCS COMPLETED.’ The user creates a Reference to that Task, with the dependency ‘FF Predecessor.’ This way, the patch Request will not close until the ‘Patch Docs Completed’ Task is complete.

Visibility into Tasks and Requests

Kintana provides the following for enabling visibility into Request and Task integration.

Requests Holding Up Progress

You can search for Requests that are holding up progress on your projects. Each portlet in the Kintana Dashboard that deals with Requests includes the field ‘Preventing Action on Requests/Tasks.’ This field can be set to display Requests that are preventing action on other Requests or Tasks.

Preventing Action On: Requests
 Tasks

Figure A-3 Request Portlet Filter Page Showing ‘Preventing Action On’ Field

Project References Portlet

You can also view References related to your Tasks and Projects using the Project References portlet on your Kintana Dashboard. Add the portlet to your Dashboard and then personalize it to show the References that are relevant to your activities. The portlet can be personalized to display References based on the following information: Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks.

Project References						
Reference	Detail	Status	% Complete	Assigned User	Description	Referenced By
Request 87266	Product Bug	New	0%		Previou...	Impleme...
Request 87233	Product Bug	New	0%		Install...	Design/...

Showing 1 to 2 of 2: [Maximize](#)

Figure A-4 Project References Portlet

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