

K I N T A N A <sup>TM</sup>

# Using the Kintana Dashboard

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**Kintana, Inc.**

1314 Chesapeake Terrace, Sunnyvale, California 94089

Telephone: (408) 543-4400

Fax: (408) 752-8460

<http://www.kintana.com>

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# Chapter 1 Introduction

This chapter introduces the Kintana Dashboard, discusses the advantages of using the Kintana Dashboard, and provides pertinent information concerning this document and other Kintana documents. The following lists the main topics found in this chapter:

- *The Dashboard Advantage*
- *About This Document*
- *How to Use This Guide*
- *Additional Resources*

## The Dashboard Advantage

Intended for large and complex environments, Kintana Dashboard provides 360° visibility and control over technology-based initiatives and IT operational tasks. Configurable, role-based visual displays called “portlets” provide relevant summary information and highlight exception conditions in Kintana-managed initiatives. Users can then drill down to any desired level of detail.

Kintana Dashboard is beneficial to all participants throughout the Technology Chain. For example, IT professionals can use Kintana Dashboard to view all of their own action items, and end-users can consult their own Dashboards to see the status of all the Requests they have submitted. The following sections highlight a few key organizational benefits introduced by the inclusion of the Dashboard in the Kintana suite.

- *360° Visibility Over IT*
- *Real-Time Monitoring and Control*
- *Personalized and Role-Based Information*

- *Centralized Viewing of All IT Initiatives and Operations*
- *Quick Access to Any Level of Desired Information*
- *Efficient Risk Assessment and Resolution*

## **360° Visibility Over IT**

With IT playing an increasingly important role in organizations, high-level executives are asking for more real-time visibility and control over enterprise projects and initiatives. Kintana Dashboard provides 360° visibility and control over technology-based initiatives and IT operational tasks. This provides management with summarized status updates of independent initiatives as well as a holistic view of all enterprise IT activities. By using this centralized portal, executives and management can better understand the inter-dependencies that exist across the IT organization. Whether the projects are an ERP financial implementation or a new customer website, Kintana provides visibility.

## **Real-Time Monitoring and Control**

Kintana Dashboard automatically captures and displays real-time data from Kintana's repository while work is in progress. Since actions, such as task completion and code deployment, are performed from within the Kintana system, this information is captured immediately. This enables users to access the most accurate information at anytime, from anywhere. Managers and executives no longer need to rely on email updates, phone calls, or status meetings to gain insight into project progress or operations efficiencies. By eliminating the need to hold meetings that consist of managers perusing spreadsheets of uncompleted deliverables, the project team becomes much more efficient.

## **Personalized and Role-Based Information**

Kintana Dashboard offers a personalized interface that provides relevant information into those programs and initiatives that impact each individual user. End-users, Executives and Managers can access a personalized Dashboard that provides a concise view into individual activities or the overarching IT project landscape. For example, a CIO who is concerned with aligning IT and business drivers could personalize his Dashboard to view initiatives from an IT value perspective at a high level. His Dashboard would then provide an overview of each enterprise project within the IT organization. He could then easily validate that each project fits into the overall strategic direction of the company.

## Centralized Viewing of All IT Initiatives and Operations

Kintana Dashboard provides a single point-of-access to all of the IT initiatives and operations. By simply logging into the Dashboard, users can view the entire range of projects and programs that are underway within the IT organization. This common interface enables effective management of both operations and initiatives from one central location. This eliminates the need to cross reference project plans, spreadsheets, and various emails which were formally used to process and monitor business initiatives.

## Quick Access to Any Level of Desired Information

To enable users to identify and resolve issues at hand, Kintana Dashboard provides drill-down capability to any level of detail. By providing multiple ways of presenting data, the Kintana Dashboard allows users to organize information in the manner most relevant to them. While directors and senior managers may choose to have a bird's-eye view of project status, more detailed information can be accessed when required.

## Efficient Risk Assessment and Resolution

Individuals managing portfolios of projects and programs with different scopes, milestones, and requirements are exposed to an overwhelming amount of data. In order to increase efficiency, the Kintana Dashboard enables exception based viewing and reporting. By allowing users to set up conditions and benchmarks, the product can provide visual updates of project risk and status. For example, visual indicators can display the severity of project risk using Green, Yellow, and Red color codes for each project.

## About This Document

This section provides an overview of this document, who should be reading this document and what types of information are included. The following lists the main topics found in this section:

- [\*Who Should Read This Guide\*](#)
- [\*How to Use This Guide\*](#)

## Who Should Read This Guide

This document provides details for defining and configuring the Kintana Dashboard. This document is intended for:

- Business users using and configuring the Kintana Dashboard
- Technical users using and configuring the Kintana Dashboard

## How to Use This Guide

This document provides background information and details for using and configuring the Kintana Dashboard. Navigate to one of the following chapter topics or use the Index to find information related to key words.

- *Introduction:*  
Provides an overview of the Kintana Dashboard, the advantages of using the Kintana Dashboard, and an overview of this document.
- *Key Concepts:*  
Describes the general concepts of the Kintana Dashboard, including: a Dashboard page, portlets and templates.
- *Dashboard Interface:*  
Describes the components Kintana Dashboard, including: the Kintana Dashboard, the menu, the Dashboard page and portlets.
- *Using the Dashboard:*  
Provides step-by-step instructions on how to use the Kintana Dashboard, including: logging on and off, adding and deleting Dashboard pages, and adding portlets.
- *System Portlets:*  
Lists all of the available system portlets.

## Additional Resources

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

- *[Kintana Documentation](#)*



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

## *Kintana Documentation*

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

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

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

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

## **Kintana Business Application Guides**

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

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

- Kintana Reports

### **User Guides**

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

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide
- Navigating the Kintana Workbench:  
Provides an overview of using the Kintana Workbench
- Navigating Kintana:  
Provides an overview of using the Kintana (HTML) interface

### **Kintana Application Reference Guides**

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

- Reference: Using Commands in Kintana
- Reference: Kintana Security Model
  
- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

## **Kintana Instance Administration Guides**

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

- Kintana Migration
- Kintana Licensing and Security Model

## **External System Integration Guides:**

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

- Kintana Open Interface

## **Kintana Solution Guides**

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

## **Kintana Accelerator Guides**

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



Kintana provides documentation updates in the Download Center section of the Kintana Web site ([http://www.kintana.com/support/download/download\\_center.htm](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

This chapter details key concepts and definitions designed to help the user understand the Kintana Dashboard. Understanding these concepts and definitions enables the user to better utilize the full feature set of the Kintana Dashboard. The following lists the key concepts for the Kintana Dashboard:

- *The Dashboard Page*
- *Portlets*
- *Dashboard Menu*
- *Personalization*
- *Dashboard Template*

## The Dashboard Page

What is the Kintana Dashboard? What is the Kintana Dashboard page?

The Kintana Dashboard is an HTML interface designed to view Kintana data. The Kintana Dashboard consists of pages and portlets.

The Dashboard pages are what a user sees when logging on to the Kintana Dashboard. Dashboard pages organize the data for the user. This organization consists of user-customized portlets that a user adds and edits for each Dashboard page. If the Kintana Dashboard is licensed at a site, a user can add specialized portlets to a Dashboard page, amplifying the power of Kintana by providing more powerful views into a business' data. A user can also create additional Dashboard pages to meet specific business needs. *Figure 2-1* illustrates the Kintana Dashboard and a typical Dashboard page.

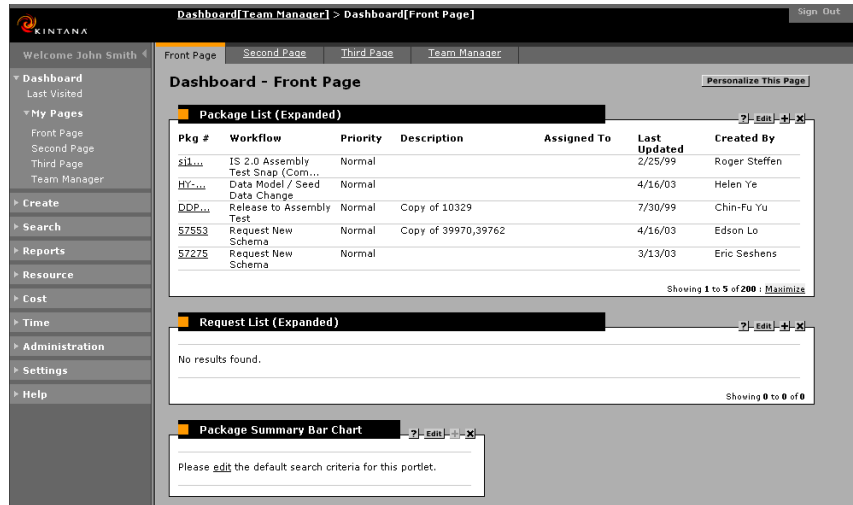


Figure 2-1 Example Dashboard Page

## Portlets

What is a portlet?

Portlets are configurable, role-based visual displays providing relevant summary information concerning business data. In essence, portlets are one way a user gets the information contained within Kintana. Multiple portlets can be displayed on a single Dashboard page and multiple Dashboard pages can have the same portlet.

Each user selects which portlets to display on a Dashboard page. Each user can also personalize each portlet to display only the information relevant to their specific Dashboard page, Project, Task, Package, Program or Request.

*Figure 2-2* illustrates a typical portlet.



Package List (Expanded)						
Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
<a href="#">s11...</a>	IS 2.0 Assembly Test Snap (Com...	Normal			2/25/99	Roger Steffen
<a href="#">HY-...</a>	Data Model / Seed Data Change	Normal			4/14/03	Helen Ye
<a href="#">DDP...</a>	Release to Assembly Test	Normal	Copy of 10329		7/30/99	Chin-Fu Yu
<a href="#">57275</a>	Request New Schema	Normal			3/13/03	Eric Seshens
<a href="#">57215</a>	Request New Schema	Normal	Schema for VO testing (MERCURY DEV SERVER)		3/13/03	Jonathan M...

Showing 1 to 5 of 200 : [Maximize](#)

Figure 2-2 Example Portlet

Each user can configure a portlet to show as few or as many entries as wanted. Many of the portlets can be displayed in a MAXIMIZED page, listing all entries of a portlet.

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

Two types of portlets are available to the user:

- System portlets
- Custom portlets

System portlets are predefined portlets developed and offered by Kintana. These portlets are designed to provide the most efficient and flexible access to business data. "*System Portlets*" on page 47 lists all of the available Kintana system portlets.



Note

Only portlets associated with Kintana product licenses are available to the user. In addition, some portlets are only available to specified users and security groups.

Custom portlets are portlets custom designed to suit the business needs of a company. Custom portlets are created by a Kintana Administrator or other advanced users with knowledge of SQL and the Kintana data model. For more information concerning custom portlets, see the "*Configuring the Kintana Dashboard*" business application guide.

# Dashboard Menu

The Kintana Dashboard includes a menu bar and a navigation path. The menu bar is on the left side of the Kintana Dashboard and links together Dashboard pages available to the user, including search pages, detail pages and reports. At the top of the menu bar are two menu buttons. The following details each of these buttons:

- **EXPAND ALL**  
Expands all of the MENU TITLES to display all of the MENU ITEMS
- **COLLAPSE ALL**  
Collapses all of the MENU ITEMS to display only the MENU TITLES

The Navigation path appears at the top of the Kintana Dashboard. [Table 2-1](#) lists and describes the menu titles.

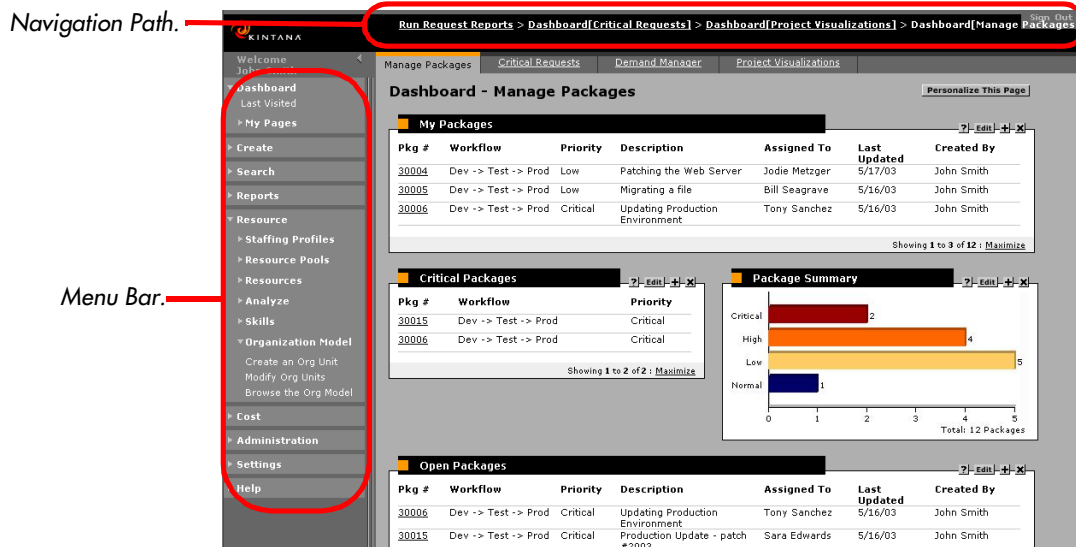


Figure 2-3 Example Menu Bar and Navigation Path

Table 2-1. Kintana Menu Titles

Menu Titles	Description
Dashboard	Top-level grouping of available pages. Includes a link to the page last visited and a list of pages (tabs) set-up by the user (Front Page, etc.).
Create	Creates or starts something new. For example: create a new budget or create a new package.
Search	Locate data within the Kintana system, including budgetary data, package data and project data.
Reports	Get pre-defined information on a Package, Project, Request, etc. For example: compare Oracle environments, get the history of a package, list all tasks assigned to a project.
Resources	Create, modify or analyze a resources. For example: create a staffing profile, modify a resource pool, analyze an assignment load, create a skill, etc.
Cost	Manage the monetary aspects of a project. For example: create a budget, analyze the current cost of a project, determine the overall costs of a project, etc.
Demand	Capture and manage all demands placed on an IT organization. For example: schedule demand, get the history of a demand, etc. NOTE: This menu title is not part of the standard Kintana Dashboard.
Team Manager	Capture and manage specific demands placed on an IT organization. For example: get on overview of specific demands, analyze specific demands by categories, etc. NOTE: This menu title is not part of the standard Kintana Dashboard.
PMO	Manage all aspects of projects and programs. For example: create a program, create a business objective, submit a project issue, request a project resource, etc. NOTE: This menu title is not part of the standard Kintana Dashboard.
Time	Manage time for a package, project demand, etc. For example: create a time sheet, approve a time sheet, create time allocations for a project, etc. NOTE: This menu title is not part of the standard Kintana Dashboard.

Table 2-1. Kintana Menu Titles

Menu Titles	Description
Administration	Open a new Kintana Workbench or create a new default Kintana Dashboard.
Settings	Open the Edit my Profile pages or view the current resource information.
Help	Open one of the following pages: Contents and Index (online help), Kintana Training, About Kintana.

## Personalization

Personalization is how users edit and modify selected Dashboard pages and portlets. Kintana offers the following levels of personalization:

- Personalize a Dashboard
- Personalize a Dashboard page
- Personalize a portlet

Personalize a Dashboard refers to adding and removing Dashboard pages from the Dashboard. (A Dashboard must have at least one Dashboard page.)

Personalizing a Dashboard page refers to which portlets appear on any given user defined Dashboard page. The first Kintana Dashboard page a user sees is the Default Dashboard page. This Default Dashboard page can be edited, adding or deleting portlets to best suit their given working environment. For example, the following portlets appear in *Figure 2-4*:

- My Packages
- Critical Packages
- Package Summary
- Open Packages

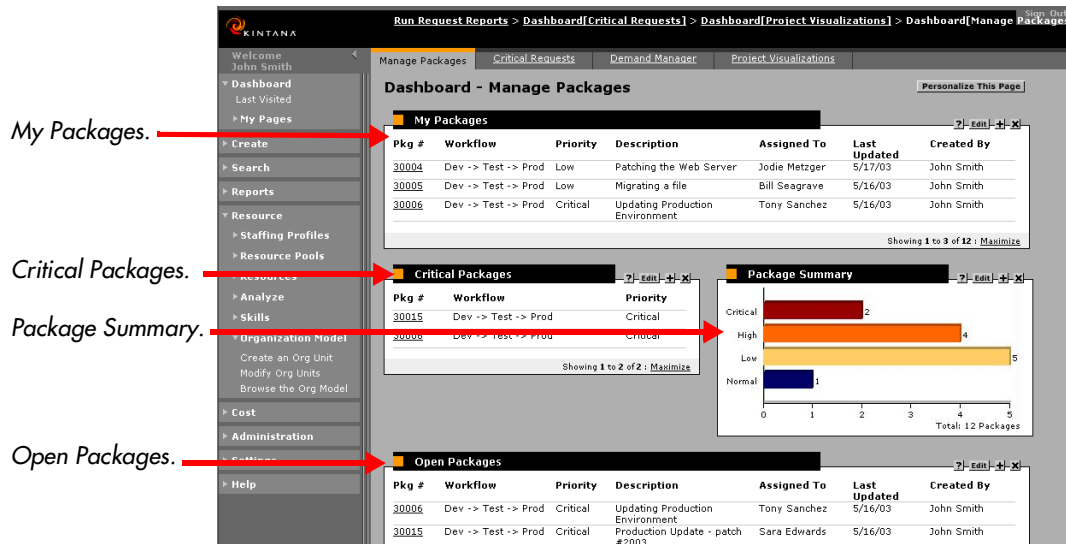


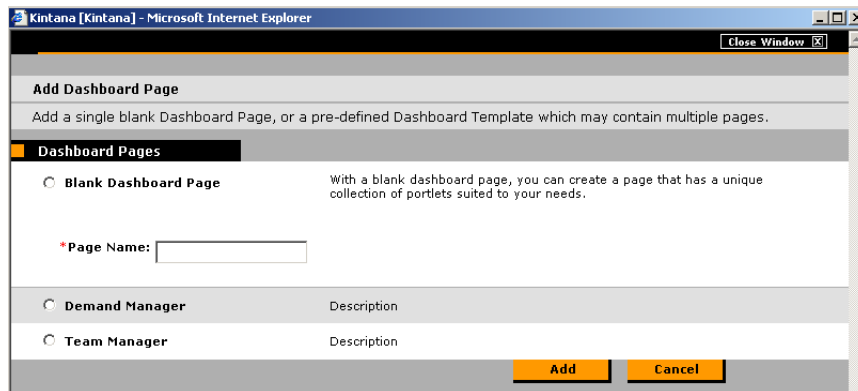
Figure 2-4 Example Dashboard Page

Personalizing a portlet refers to customizing a specific portlet to display only the information relevant to a specific Project, Task, Package, Program or Request. Personalizing a portlet can facilitate the display of data that is pertinent to a user's requirements.

## Dashboard Template

Dashboard templates are pre-defined Dashboard pages, created by the Kintana Administrator, and available for users to add to their Dashboards. These Dashboard templates *jump-start* the user by offering a pre-configured Dashboard page for inclusion on their Dashboard. This negates the need for the user to add the same portlets to every new Dashboard page.

The Kintana Administrator can create many different Dashboard templates, offering the user a variety of Dashboard page configurations to add to their Dashboard. *Figure 2-5* illustrates the ADD DASHBOARD PAGE with two Kintana Administrator defined Dashboard templates (**DEMAND MANAGER** and **TEAM MANAGER**).



*Figure 2-5 Example: Dashboard Templates*

# Chapter 3 Dashboard Interface

The Kintana Dashboard provides visibility and control over technology-based initiatives and IT operational tasks. Users can personalize their Dashboard pages, determining which portlets are displayed and what information is displayed in the portlets. This chapter contains the following information:

- *Dashboard Interface Overview*
- *Menu*
- *Dashboard Page*
- *Portlets*

## Dashboard Interface Overview

The Kintana Dashboard is an HTML interface providing a standard interface for Dashboard Pages. This standard interface includes a menu bar, a navigation path, Sign Out button and one or more Dashboard pages. The menu bar is on the left side of the Kintana Dashboard and links together pages available to the user, including search pages, detail pages and reports. The menu bar is organized into menu titles and menu items. The navigation path appears at the top of the Kintana Dashboard and lists the Dashboard pages visited by the user. Clicking on an address in the navigation path returns the user to that Dashboard page. At the top right hand corner of the Kintana Dashboard is the **SIGN OUT** button. Clicking this button exits the user from the Kintana Dashboard. *Figure 3-1* illustrates a typical Kintana Dashboard.

The Dashboard page is the HTML page a user sees in the Kintana Dashboard. A Kintana Dashboard can have one or more Dashboard pages. Each Dashboard page consists of one or more portlets and a **PERSONALIZE THIS PAGE** button. The **PERSONALIZE THIS PAGE** button opens the PERSONALIZATION page. The

PERSONALIZE: DASHBOARD page is used to personalize a DASHBOARD page by adding, deleting or moving portlets around the Dashboard page. The PERSONALIZE: DASHBOARD page can also add or delete Dashboard pages from the Kintana Dashboard.

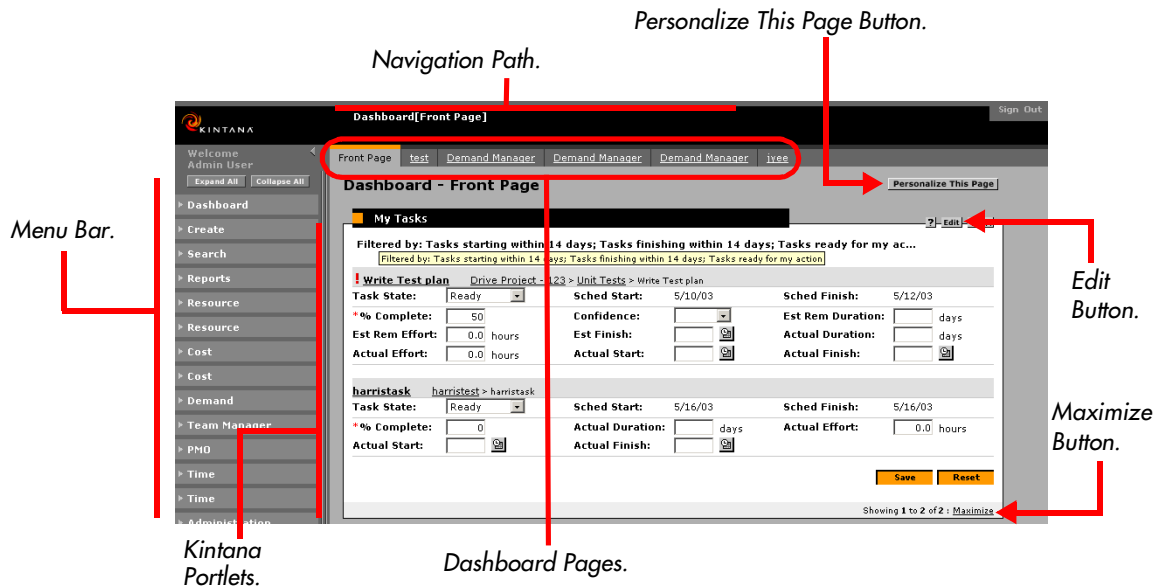


Figure 3-1 Typical Kintana Dashboard

Portlets are how users get the information contained within Kintana. Multiple portlets can be displayed on a single Dashboard page and multiple Dashboard pages can have the same portlet. Each user selects which portlets to display on which Dashboard pages. Each user can also personalize portlets to display only information relevant to their specific Dashboard page, Project, Task, Package, Program or Request.

Portlets are configured using the portlet **EDIT** button. The portlet **EDIT** button displays a portlet edit page tailored specifically for each portlet. Personalized portlet information edited on the portlet edit page might include: a new portlet title, how to sort the data, how to arrange the data, how much of the data should be displayed, and how to filter the data (assigned to, created by, priority, etc.).

Each returned item listed in a portlet can be drilled down into, accessing additional information concerning a specific item. This facilitates the research of additional or background data of a specific Project, Task, Package, Program or Request. Additional information can include: identification numbers, attached forms, attached documents, priorities and group numbers.



Typically, a portlet does not display all of the returned items pertinent to a portlet. The number of visible returned items listed in the portlet is configurable by the user. To see all of the items listed by a portlet, the **MAXIMIZED** button returns a portlet **MAXIMIZE** page, listing all returned items for a portlet.

## Menu

The Kintana Dashboard menu bar is on the left side of the Kintana Dashboard and links together Dashboard pages available to the user, including search pages, detail pages and reports. Depending on permissions and security groups, not all Dashboard pages are available to all users. The menu bar is organized into menu titles, menu items and two buttons. *Table 2-1 on page 15* lists and describes the menu titles. *Figure 3-2* illustrates the Kintana menu bar. The two menu buttons are at the top of the menu bar. The following details each of these buttons:

- **EXPAND ALL**  
Expands all of the **MENU TITLES** to display all of the **MENU ITEMS**
- **COLLAPSE ALL**  
Collapses all of the **MENU ITEMS** to display only the **MENU TITLES**

The Kintana Dashboard menu bar can be minimized using the ◀ icon next the user's name. Under the Dashboard menu title, the **LAST VISITED** menu item is a link to the last Dashboard page visited. When accessing a portlet edit page or a portlet drill down page, the user can immediately access the last Dashboard page visited using this link.

Users can move from one Dashboard page to another Dashboard page using the menu items under the **MY PAGES** menu title. Additionally, users can move from one Dashboard page to another by selecting the tab at the top of each Dashboard page. Users can also access previously visited pages by selecting entries in the navigation path at the top of the Kintana Dashboard.

Note

Typically, the Dashboard Front page is the first (default) Dashboard page available to the user. The Dashboard Front page can be renamed, personalized and/or deleted as required by a user.

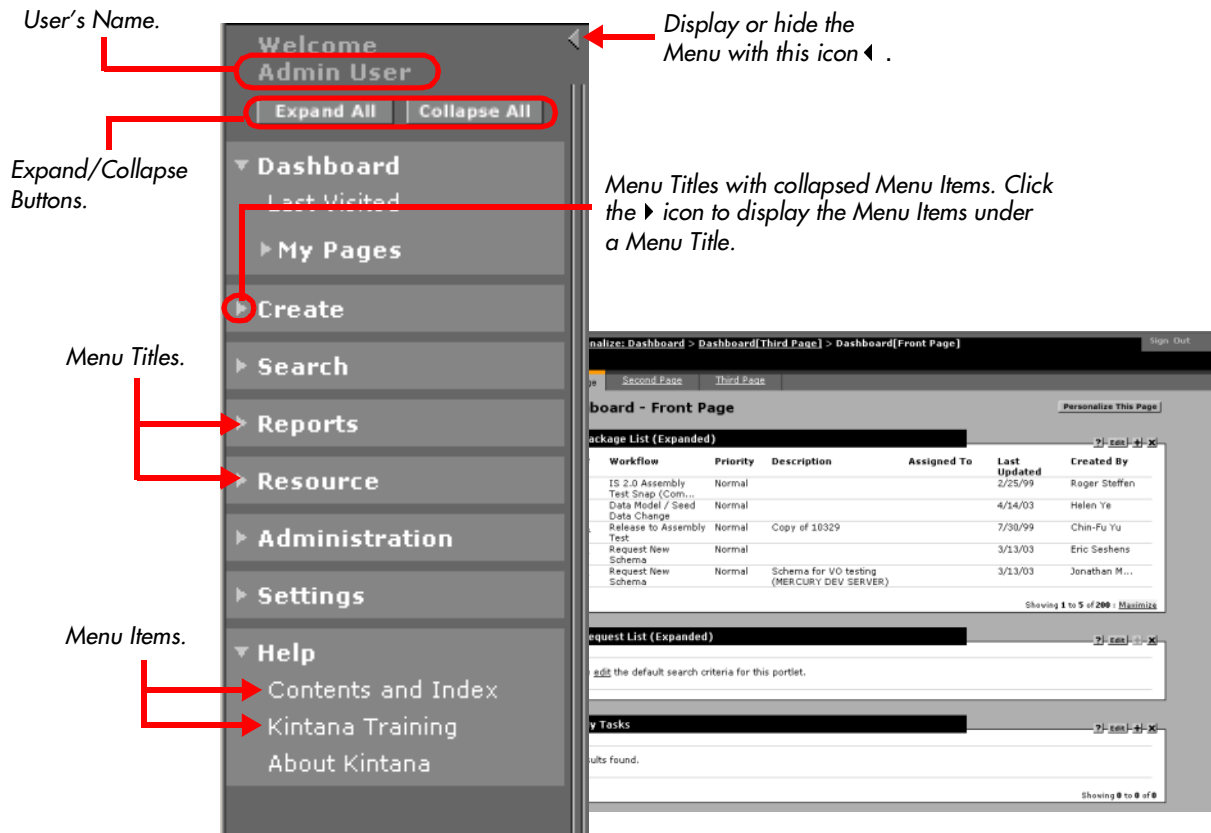


Figure 3-2 The Kintana Dashboard Menu

## Dashboard Page

A Dashboard page consists of one or more portlets personalized by the user. Each Kintana user has access to their own set of Dashboard pages. Typically, the Dashboard Front page is the first (default) Dashboard page available to the user.

Each Dashboard page includes a pre-defined set of portlets and the **PERSONALIZE THIS PAGE** button. The **PERSONALIZE THIS PAGE** button links the user to the PERSONALIZE: DASHBOARD page, where the user can *personalize* a Dashboard page. When accessing the Kintana Dashboard for the first time, users will see the Dashboard front page. The Dashboard front page is nothing more than a copy of the Default Dashboard, ready for personalizing. Kintana provides a Default Dashboard with the Kintana Dashboard. A Kintana

Administrator can edit the Default Dashboard to better serve a site's requirements.

When adding Dashboard pages to their Dashboards, users can choose the default Dashboard page or any available Dashboard Templates (defined by the Kintana Administrator). Whether choosing the default Dashboard page, or a Dashboard Template, these new pages should be considered starting points for the user. Each new page should be personalized by the user to meet their specific needs and requirements. *Figure 3-3* illustrates a typical Dashboard page.

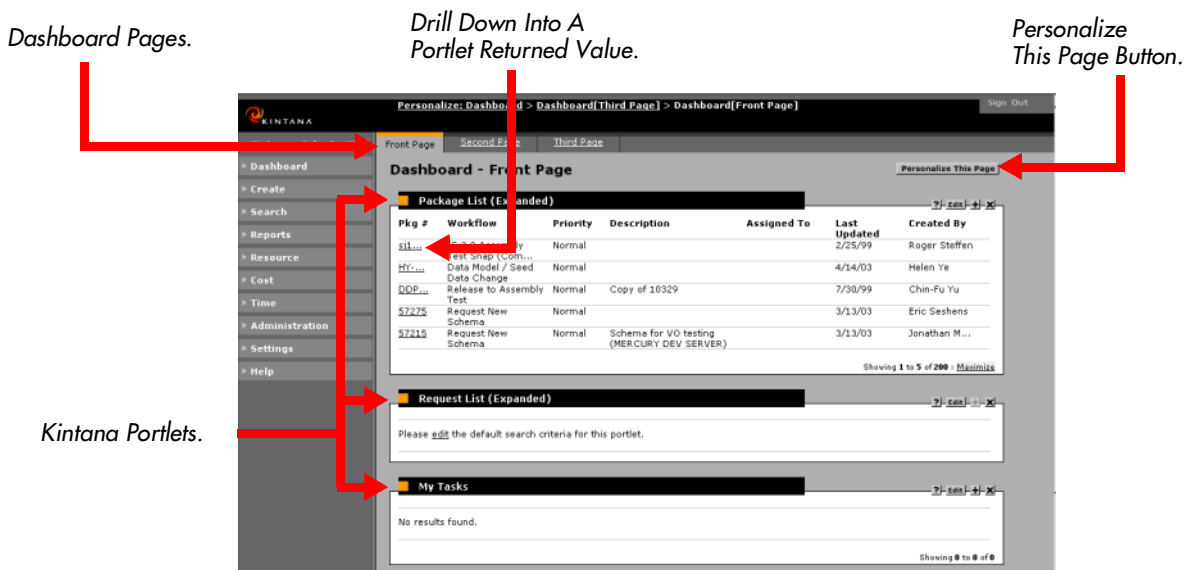


Figure 3-3 Typical Dashboard Page

## Personalize This Page

Dashboard pages are a way of organizing portlets into relevant groups. Portlets for a specific project, group, function, package or task can be added to a single Dashboard page. The PERSONALIZE: DASHBOARD page provides the user with the tools necessary to add portlets to a Dashboard page. To access the PERSONALIZE: DASHBOARD page, use the **PERSONALIZE THIS PAGE** button.

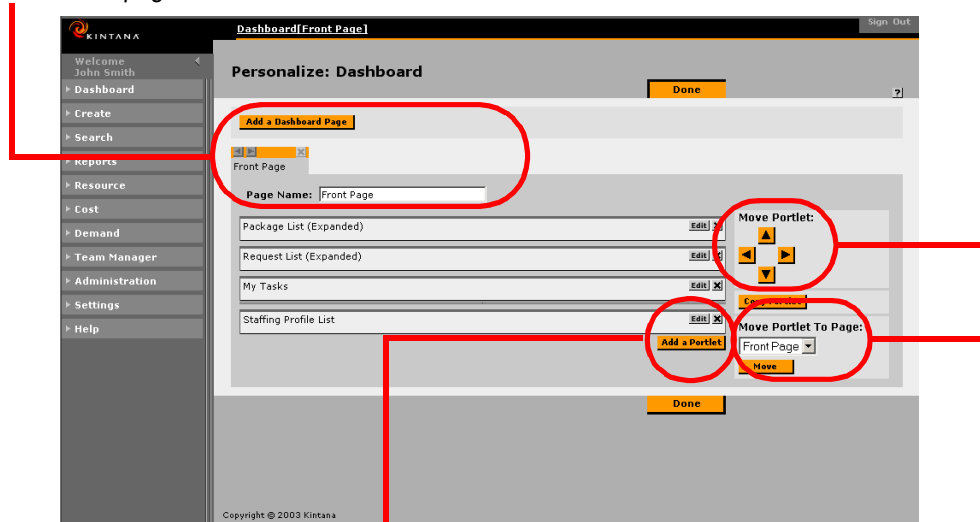
Users create a new Dashboard page, using the **NEW DASHBOARD PAGE** button. When creating a new Dashboard page, a NEW DASHBOARD window is displayed. The user selects the template for the new Dashboard page and the name of the new Dashboard page.

Portlets are added to a Dashboard page using the **ADD A PORTLET** button. When adding a portlet, the ADD A PORTLET page is displayed, where users select the portlet to be added to the Dashboard page.

Portlets can also be moved around the Dashboard page. A selected portlet can move up or down the page, or from side to side. *Figure 3-4* illustrates the DASHBOARD: PERSONALIZE page.

Add and delete Dashboard pages.

Move portlets around the page.



Add a portlet to a page.

Move a portlet to another page.

Figure 3-4 Typical Dashboard: Personalize Page

## Project Overview Page

The PROJECT OVERVIEW page provides a one-stop view into project-specific data. Consisting of unique Drive-related portlets, the PROJECT OVERVIEW page can be personalized to display data relevant to each project. *Table on page 53* lists the set of portlets available to the PROJECT OVERVIEW page. *Figure 3-5* illustrates the PROJECT OVERVIEW page.

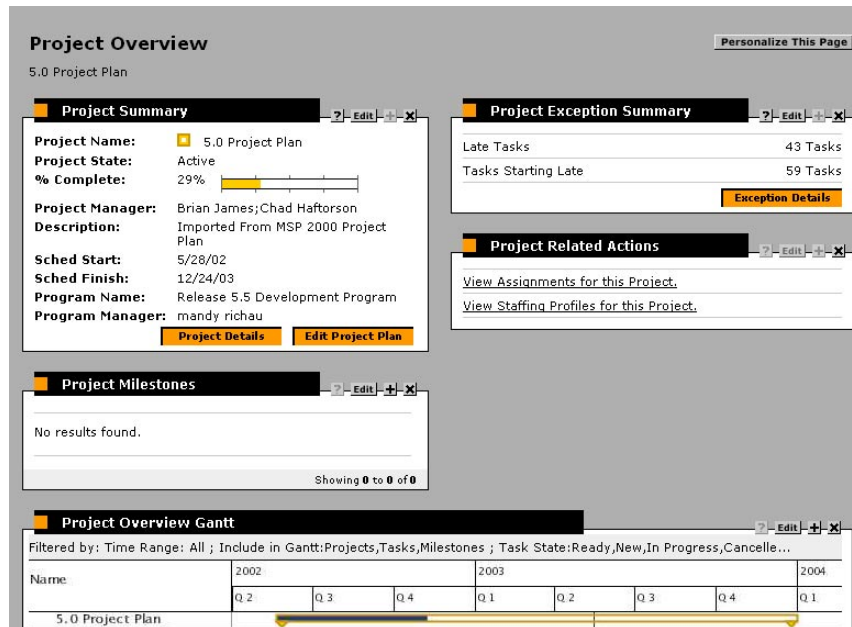


Figure 3-5 Project Overview Page

## Portlets

Kintana portlets contain columns of data related to a specific Project, Task, Package, Program or Request. For example, the PACKAGE LIST (EXPANDED) portlet, shown in *Figure 3-6*, displays the following information pertaining to Kintana packages: PACKAGE #, WORKFLOW, PRIORITY, DESCRIPTION, ASSIGNED TO, LAST UPDATED AND CREATED BY.

System portlets are predefined portlets developed and offered by Kintana for each of the Kintana products. These portlets are designed to provide the most efficient and flexible access to a business' data. "*System Portlets*" on page 47 lists all of the available Kintana system portlets.



Note

Only portlets associated with the Kintana products license are available to the user. In addition, some portlets are only available to specified users and security groups.

Custom portlets are portlets custom designed to suit the business needs of a company. Custom portlets are created by a Kintana Administrator or other advanced users with knowledge of SQL and the Kintana data model. For more

information concerning custom portlets, see "[Configuring the Kintana Dashboard](#)".

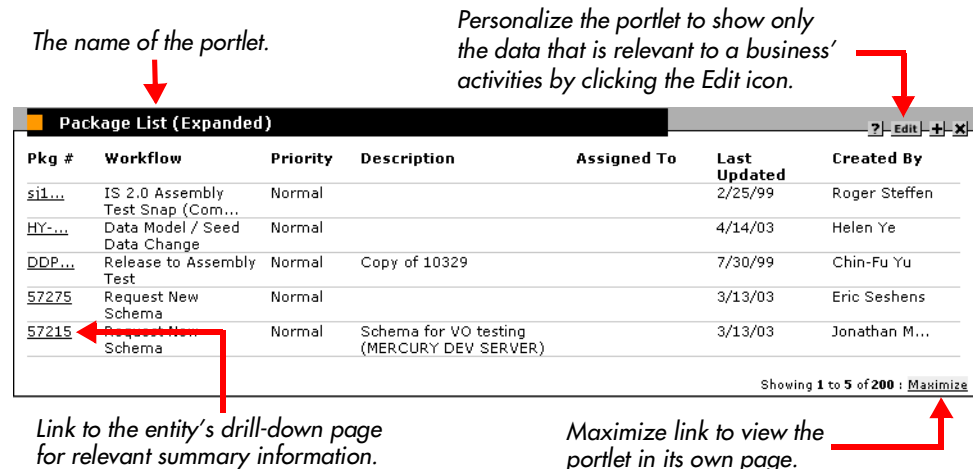


Figure 3-6 Portlet Interface

Kintana portlets are highly personalizable. Using the [Portlet Edit Page](#), a user can set the number of results to be displayed in a portlet, determine what and how many fields will be displayed in the portlet, chose an ascending or descending order for the results and even the name of the portlet can be changed. Using the [Portlet Drill Down Page](#), a user can see all of the available data for a specific entity within a portlet. Using the [Portlet Maximize Page](#), a user can see every entity available to a portlet.

## Portlet Edit Page

Each Kintana portlet has an associated portlet edit page. The portlet edit page is used to personalize the portlet: change the title, select which data to display, or select the maximum results to be displayed. The specific fields are different for each portlet. [Figure 3-7](#) illustrates the components of the **EDIT** icon. [Figure 3-8](#) illustrates a typical portlet edit page.

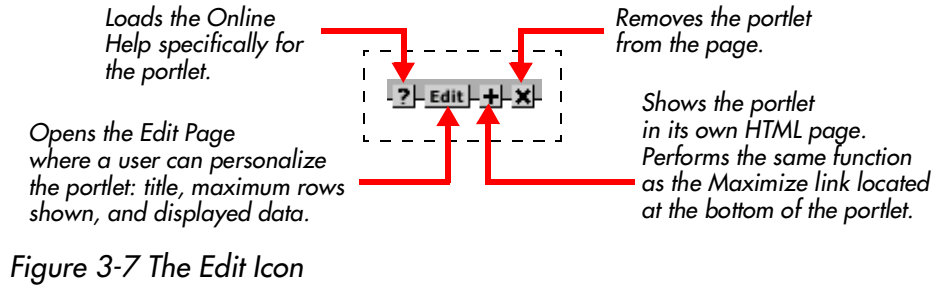


Figure 3-7 The Edit Icon

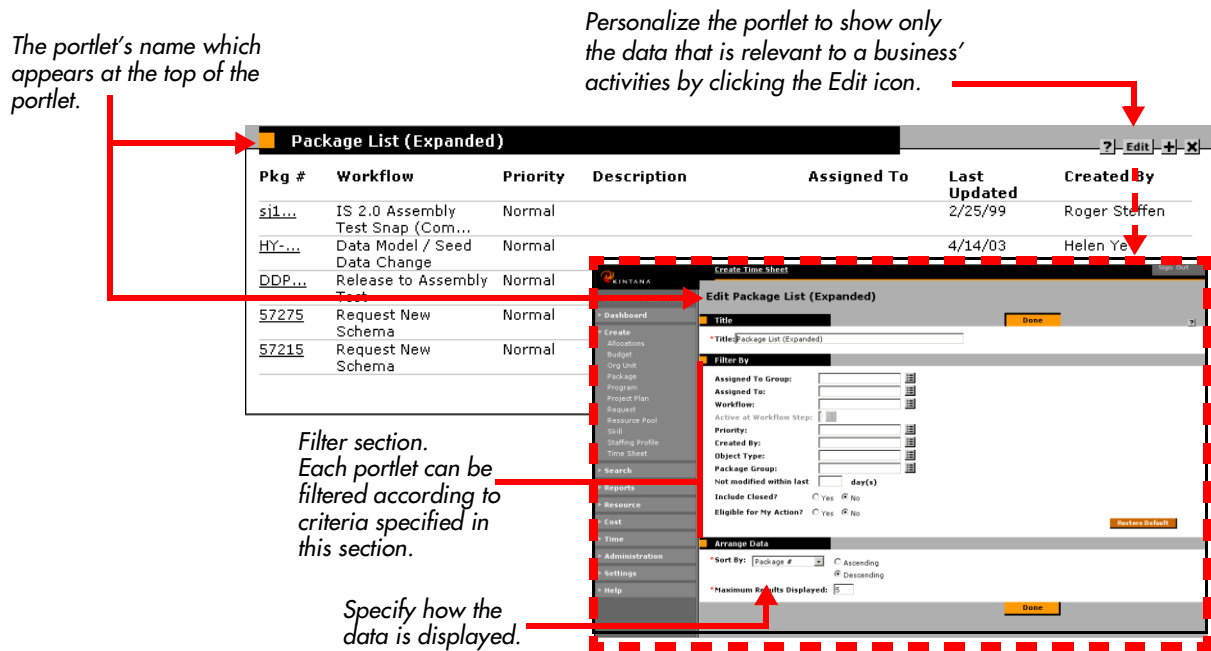


Figure 3-8 Portlet Edit Page

## Portlet Drill Down Page

Typically, a portlet is personalized to display a user's relevant data. When a user requires more, or all, of the available data for a specific entity, the user can display the portlet drill down page. For example, clicking on the PACKAGE # in the PACKAGE LIST portlet drills down to the Package's default page.

A portlet drill down page contains the additional or background information for Project, Task, Package, Program or Request. This additional information can include the following: identification numbers, group numbers, created by information, created on information, assigned user, percent completed,

priority, status, attached documents, notes and references. *Figure 3-9* illustrates a typical portlet drill down page.

Link to the entity's detail page or other relevant summary information.

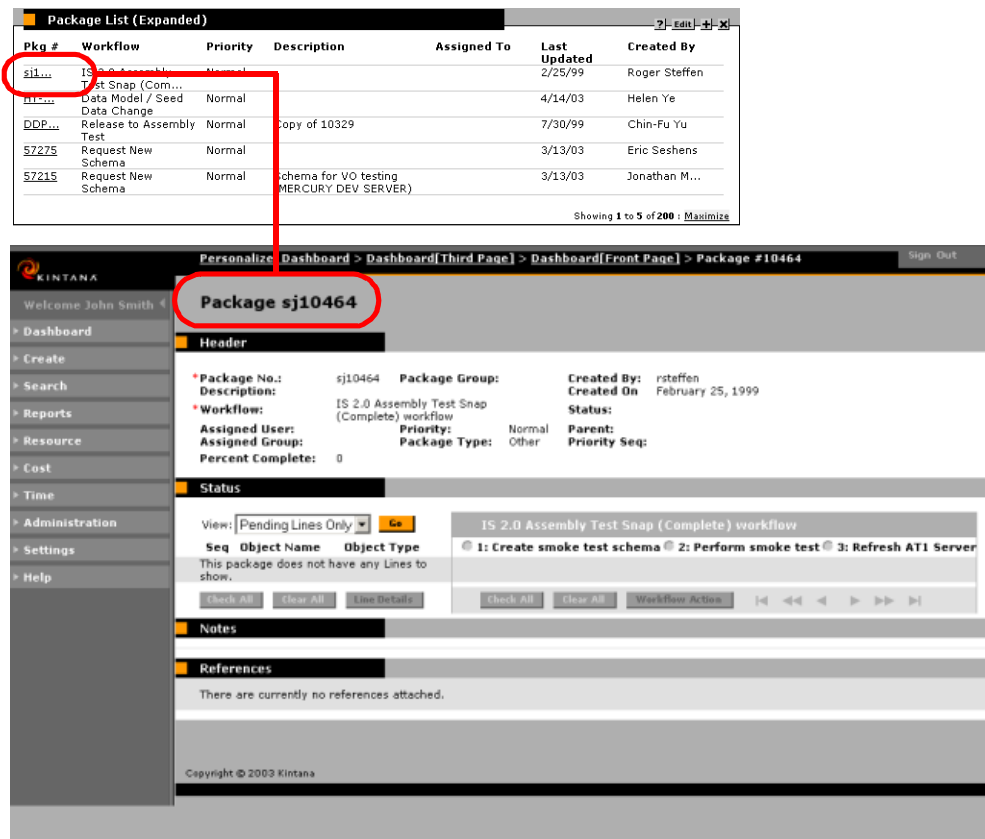


Figure 3-9 Portlet Drill Down Page

## Portlet Maximize Page

Typically, only the highest priority items are listed in a portlet. Set by the user, only a specified number of entries are displayed per portlet. This facilitates having only the most relevant data available to the user on a single Dashboard page.

When a user needs more, or all, of the relevant items to be displayed, the MAXIMIZED page is used. The Maximized page is a separate HTML page displayed if a user selects the MAXIMIZED button in the bottom right hand corner of the portlet, or the + button in the upper right hand corner of the portlet. *Figure 3-10* shows a portlet on a Dashboard page and the same portlet in its own Maximized Page.



Dashboard[Third Page] > Dashboard[Front Page] > Package #10464 > Package #57215 > Package List (Expanded)

Welcome John Smith

**Package List (Expanded)**

Package #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
110464	IS 2.0 Assembly Test Snap (Complete) workflow	Normal			2/25/99	Roger Steffen
HYC-...	Data Model / Seed Data Change	Normal			4/14/03	Helen Ye
DDP00747...	Release to Assembly Test	Normal	Copy of 10329		7/30/99	Chin-Fu Yu
57275	Request New Schema	Normal			3/13/03	Eric Seshens
57215	Request New Schema	Normal	Schema for VO testing (MERCURY DEV SERVER)		3/13/03	Jonathan M...
57206	Request New Schema	Normal			4/13/03	Jonathan M...
52551	Request New Schema	Normal			1/16/02	Jonathan M...
50355	Request New Schema	Normal			8/31/01	Jonathan M...
49376	Request New Schema	Normal			7/19/01	Ka...
45235	Request New Schema	Normal			7/16/01	Wf...
49177	Request New Schema	Normal			7/10/01	Wf...
49136	Data Model / Seed Data Change	Low			10/9/02	Di...
48875	Request New Schema	Normal			6/13/01	Va...
46228	Request New Schema	Normal	Copy of 46997		3/19/01	Ed...
45819	Request New Schema	Normal			1/26/01	Pa...
45175	Data Model / Seed Data Change	Low		Vivekanandan Natarajan	6/6/02	Viv...
45138	Data Model / Seed Data Change	Low			1/10/01	Na...
44836	Release to Assembly	Normal			12/21/00	Ba...

Showing 1 to 5 of 200 : [Maximize](#)

Click the + button or the Maximize link to view the portlet in its own page.

Figure 3-10 Portlet Maximized Page



Note

The number of entities displayed on a PORTLET MAXIMIZED page is configurable through the SETTINGS->EDIT MY PROFILE page.

## Exporting Data to Excel

From time to time, a user might need to extract data from a Kintana page. To support this functionality, specific types of Kintana data can be exported from some maximized portlet pages and some search results pages into Microsoft Excel. Those maximized portlet and search results pages supporting the export

of data to Excel functionality have the **EXPORT DATA TO EXCEL** button in the lower left-hand corner of the page (see *Figure 3-11*).

When an export is initiated, data is fed to the user’s workstation and stored in a temporary .xls file. A browser window is then opened, pointing to the temporary .xls file. In most cases, the browser launches Excel, but some users might have different configurations. The user can then perform all the standard Excel functions, including a save of the file.

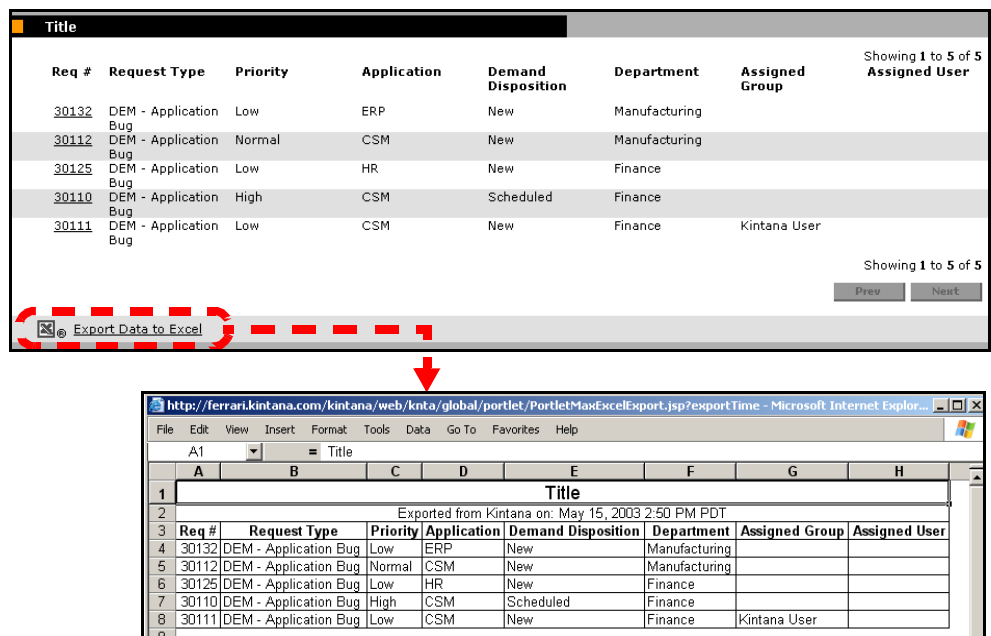


Figure 3-11 Export to Excel

Most data from search results and maximized portlet pages is exported “as-is” and Excel translates the data into the various formats. There are a few exceptions. The following lists those exceptions:

- Red, Yellow, or Green indicators are translate into a shaded cell with a white ‘R’, ‘Y’, or ‘G’ letter.
- Task Exception indicators are translated into a red exclamation mark.
- Milestone indicators are translated into a black diamond character.
- Status bars are exported with the percentage number plus a percent (%) character.

- Currency values are exported with the currency sign and any commas and periods.
- Links to URLs are exported but altered to open in a new window (instead of the current window).
- Checkboxes in the search results are not exported.

Note

Not all Kintana pages support the exporting of data to an Excel spreadsheet. Typically, two types of Kintana pages support the exporting of data to Excel:

- **Search Results Page** – In the results page for standard searches, the user is able to export the results into an Excel spreadsheet. This exports all of the queried results, not just the results on the page (i.e. no need to do a prev/next and export each page). If a search reaches the maximum number of rows, only that maximum number of rows is exported. Also, exporting the search data to an Excel spreadsheet exports the columns in the same order as displayed in the results.
- **Portlet Maximized Page** - In the Portlet Maximize page of table (and some graph) portlets, the user is able to export the into an Excel spreadsheet. Exporting data into an Excel spreadsheet also supports portlets in drill down screens (Project Overview, custom Overview pages). If the maximum number of entities for the portlet is reached, only that maximum number of entities is exported. Also, exporting portlet data into an Excel spreadsheet exports the columns in the same order as displayed in the results. Exporting portlet data into an Excel spreadsheet does not support the following:
  - Graphical portlets (standard or custom)
  - JSP portlets (updateable portlets, MY TASKS, the GANTT CHART portlet, etc.)
  - Form portlets (PROJECT OVERVIEW)
  - Any portlet not supporting a maximize page



## Chapter

## 4

# Using the Dashboard

The Kintana Dashboard can be personalized to meet the goals of a variety of users. The Kintana Dashboard can be configured to communicate real-time status and trends to all levels of Kintana users. The Kintana Dashboard provides a central location from which managers, executives and participants can view, track, and update their business activities. The following lists the primary user procedures for the Kintana Dashboard:

- *Logging On and Off the Dashboard*
- *Changing a Password*
- *Configuring a Portlet Maximized Page*
- *Adding and Deleting a Dashboard Page*
- *Adding Portlets to the Dashboard Page*
- *Personalizing a Portlet*
- *Accessing the Project Overview Page*
- *Exporting Data to an Excel Spreadsheet*
- *Accessing Kintana Help*

## Logging On and Off the Dashboard

The Kintana Dashboard is accessed through a Web browser over a network. This section details the steps required to logon to the Kintana Dashboard and to log off the Kintana Dashboard.

To logon to the Kintana Dashboard:

1. Contact the System Administrator or Webmaster to obtain the following:

- Web address (URL) of the Kintana installation
  - A username
  - A password
2. From the browser, access the web address of the Kintana installation.
  3. In the USERNAME: field, enter the username.
  4. In the PASSWORD: field, enter the password.



Note

To have the server retain a password, click the **REMEMBER MY LOGON** check box. Once this check box is selected, the user will not be required to enter a password again.

First time user's might be prompted for a new password.

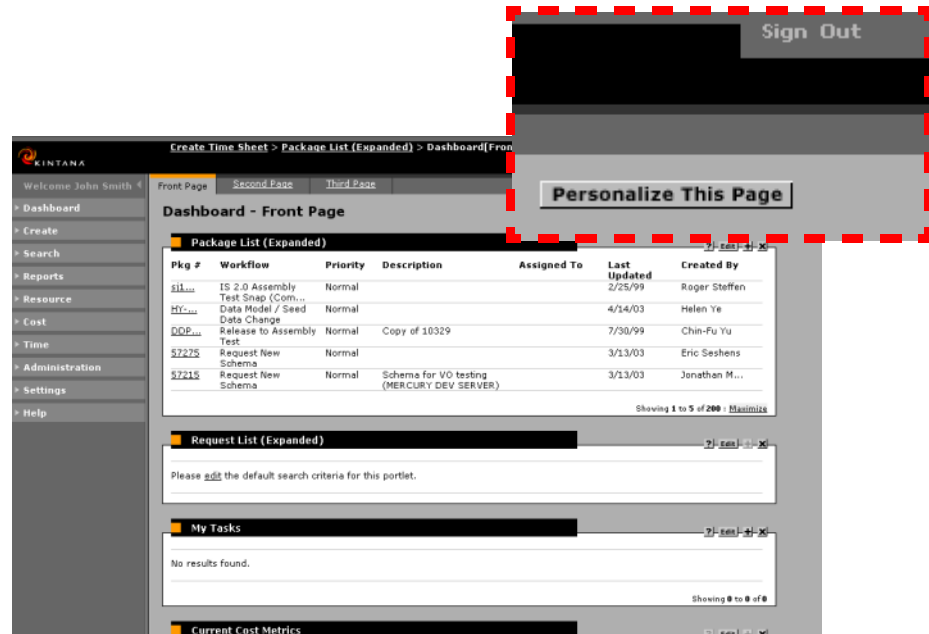
5. Click the **SUBMIT** button. The Kintana Dashboard opens.

The image shows two screenshots of the Kintana web application. The top screenshot is the login page, featuring a 'Logon' section with 'Username:' and 'Password:' input fields, a 'Remember my logon' checkbox, and a 'Submit' button. The bottom screenshot is the 'Dashboard - Front Page'. It includes a navigation menu on the left with options like Dashboard, Create, Search, Reports, Resource, Cost, Time, Administration, Settings, and Help. The main content area displays a 'Package List (Expanded)' table with columns for Pkg #, Workflow, Priority, Description, Assigned To, Last Updated, and Created By. Below the table are sections for 'Request List (Expanded)' and 'My Tasks', both showing 'No results found.' The bottom of the dashboard shows 'Current Cost Metrics'.

Pkg #	Workflow	Priority	Description	Assigned To	Last Updated	Created By
511...	IS 2.0 Assembly	Normal			2/25/99	Roger Steffen
HY...	Test Snap (Com...	Normal			4/14/03	Helen Ye
DDP...	Data Model / Seed	Normal			7/30/99	Chin-Fu Yu
57275	Release to Assembly	Normal	Copy of 10329		3/13/03	Eric Seshens
57215	Request New Schema	Normal	Schema for VO testing (MERCURY DEV SERVER)		3/13/03	Jonathan M...

To log off of the Kintana Dashboard:

1. Go to a Dashboard Page.
2. Click the **SIGN OUT** button in the upper right hand corner of the Dashboard. The Kintana Dashboard closes.



Note

Logging off the Kintana Dashboard returns the user to the Kintana Logon page.

## Changing a Password

The EDIT MY PROFILE page contains the fields to re-set a password. The following details how to change a password:



Note

Passwords are stored on the Kintana server. If **REMEMBER MY LOGON:** is checked, the new password will be recognized and accepted.

1. Logon to the Kintana Dashboard. See *“Logging On and Off the Dashboard”* on page 33.
2. On the menu, click the **SETTINGS** menu title. The **SETTINGS** menu items are listed.
3. On the **SETTINGS** menu items list, click **EDIT MY PROFILE**. The **EDIT MY PROFILE** page is returned.
4. In the **OLD PASSWORD:** field, enter the existing password.
5. In the **NEW PASSWORD:** field, enter the new password.
6. In the **REPEAT NEW PASSWORD:** field, re-enter the new password.

The screenshot shows the 'Edit My Profile' page. It has a grey header with the title 'Edit My Profile'. Below the header, there are two main sections. The first section is 'Change Password', which has a black header with a yellow square icon. It contains three input fields: 'Old Password:', 'New Password:', and 'Repeat New Password:'. The second section is 'Portlet Preferences', also with a black header and yellow square icon. It contains one input field: 'Results in Maximized Portlets:' with the value '50'. At the bottom right of the page, there is a yellow button labeled 'Done'.

7. Click the **DONE** button. The new password is accepted. The Dashboard page is returned.

## Configuring a Portlet Maximized Page

The **EDIT MY PROFILE** page contains the fields to change the number of entities listed in a portlet maximized page. The following details how to set the number of entities listed in a portlet maximized page:

1. Logon to the Kintana Dashboard. See *“Logging On and Off the Dashboard”* on page 33.



2. On the menu, click the **SETTINGS** menu title. The **SETTINGS** menu items are listed.
3. On the **SETTINGS** menu items list, click **EDIT MY PROFILE**. The **EDIT MY PROFILE** page is returned.
4. In the **RESULTS IN MAXIMIZED PORTLETS** field, enter the number of lines (entities) to be listed in a **MAXIMIZED PORTLET** page.

**Edit My Profile**

**Change Password**

Old Password:

New Password:

Repeat New Password:

**Portlet Preferences**

Results in Maximized Portlets:

**Done**

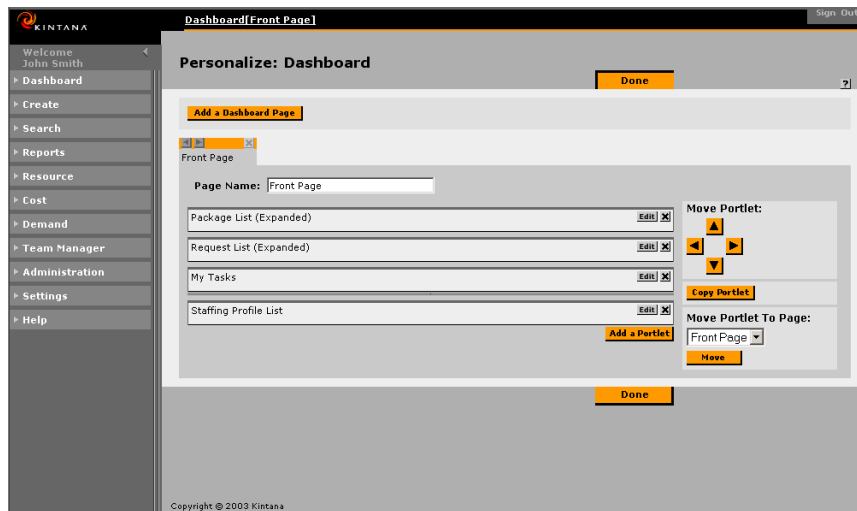
5. Click the **DONE** button. The new **RESULTS IN MAXIMIZED PORTLETS** parameter is accepted. The Dashboard page is returned.

## Adding and Deleting a Dashboard Page

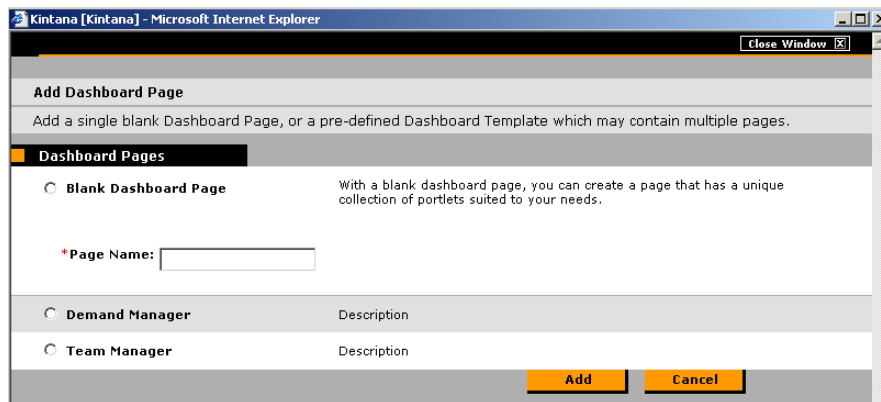
Multiple dashboard pages allow users to group similar portlets. For example, each Dashboard page can represent a view into a single project or work group.

To add a Dashboard page to the Kintana Dashboard:

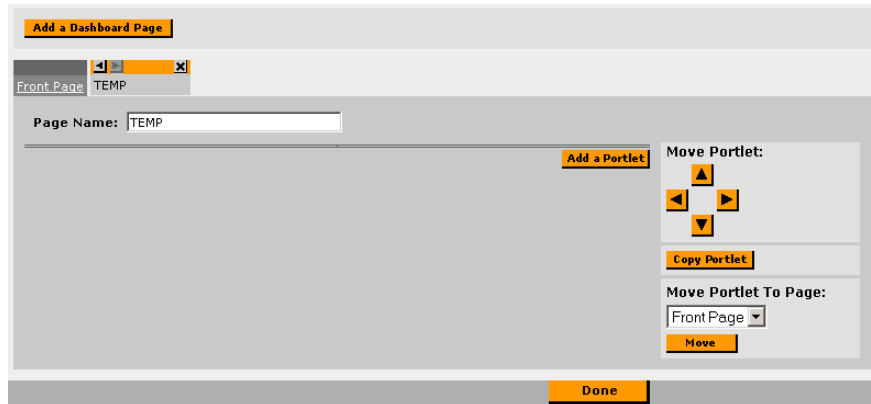
1. Logon to the Kintana Dashboard. See [“Logging On and Off the Dashboard”](#) on page 33.
2. Click the **PERSONALIZE THIS PAGE**(  ) button. The **PERSONALIZE: DASHBOARD** page is returned.



3. On the Personalize: Dashboard page, click the **ADD DASHBOARD** button. The **ADD A DASHBOARD PAGE** is displayed.

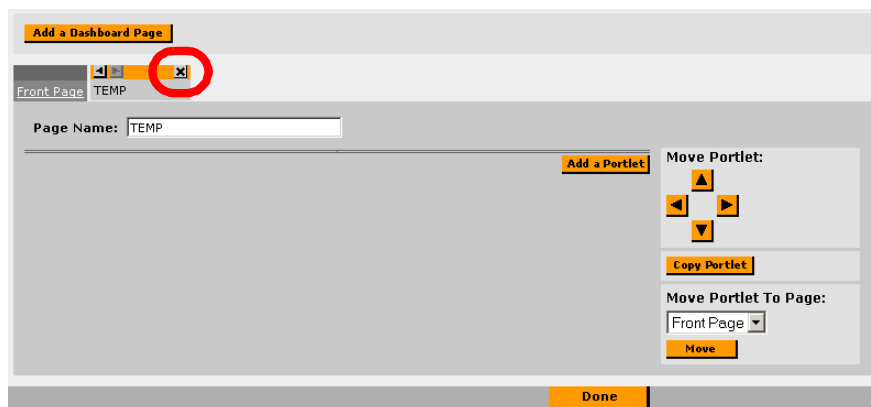


4. On the **ADD DASHBOARD PAGE** window, select a radio button for the type of Dashboard page to add. The number and definition of available Dashboard pages depends on the specific Kintana site.
5. In the **PAGE NAME** field, enter the name for the new Dashboard page.
6. Click the **ADD** button. The new Dashboard page is now added to the Kintana Dashboard. The user can now personalize the portlets on the new Dashboard page. See *“Personalizing a Portlet”* on page 42.



To delete a Dashboard page from the Kintana Dashboard:

1. Logon to the Kintana Dashboard. See [“Logging On and Off the Dashboard”](#) on page 33.
2. Click the **PERSONALIZE THIS PAGE** ( **Personalize This Page** ) button. The PERSONALIZE: DASHBOARD page is returned.
3. Locate the tab of the Dashboard page to be deleted.
4. In the upper right-hand corner of the tab, click the **X**. The selected Dashboard page is now deleted from the Kintana Dashboard.



## Adding Portlets to the Dashboard Page

The Kintana Dashboard enhances the interaction with business data by providing configurable views into Kintana. Each licensed Kintana product has a number of associated portlets which can be added to a Dashboard page. See *“System Portlets”* on page 47 for a list of all available portlets.

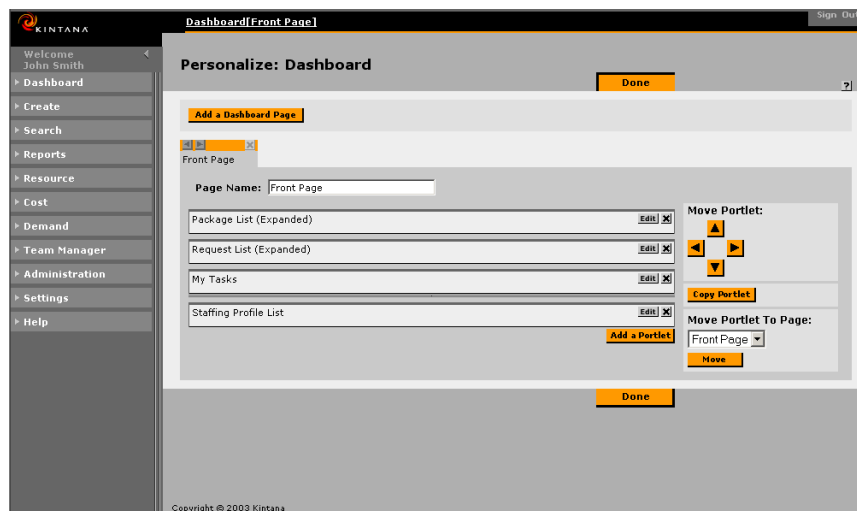


Note

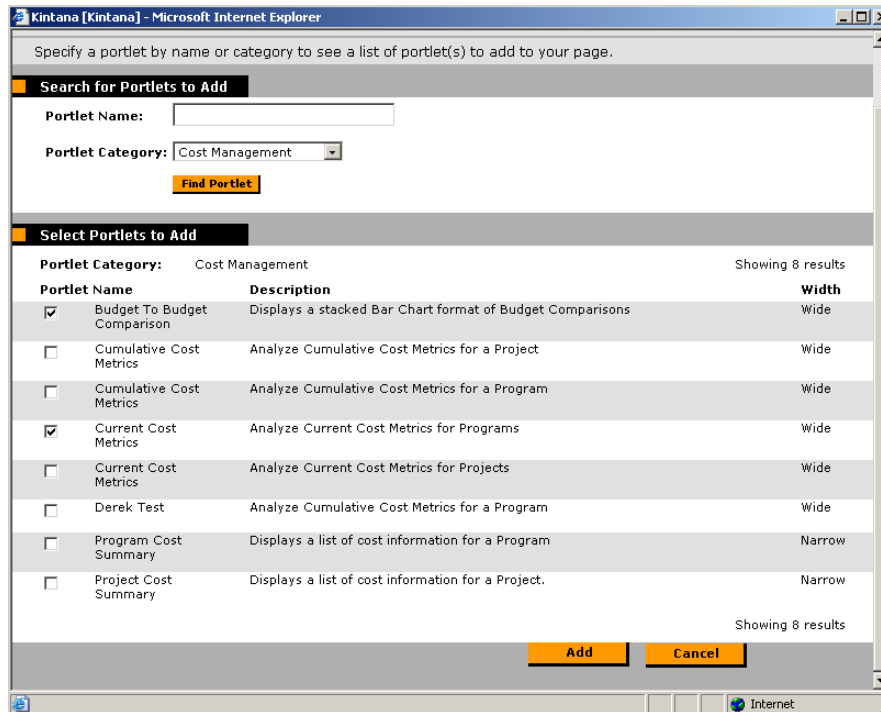
Portlets can only be added that are associated with the products licensed at the user’s site and for which the user’s account is licensed.

The following details how to add a portlet to the Kintana Dashboard:

1. Logon to the Kintana Dashboard. See *“Logging On and Off the Dashboard”* on page 33.
2. Click the **PERSONALIZE THIS PAGE** ( **Personalize This Page** ) button. The PERSONALIZE: DASHBOARD page is returned



3. On the PERSONALIZE: DASHBOARD page, click the **ADD A PORTLET** button. The ADD A PORTLET window is displayed

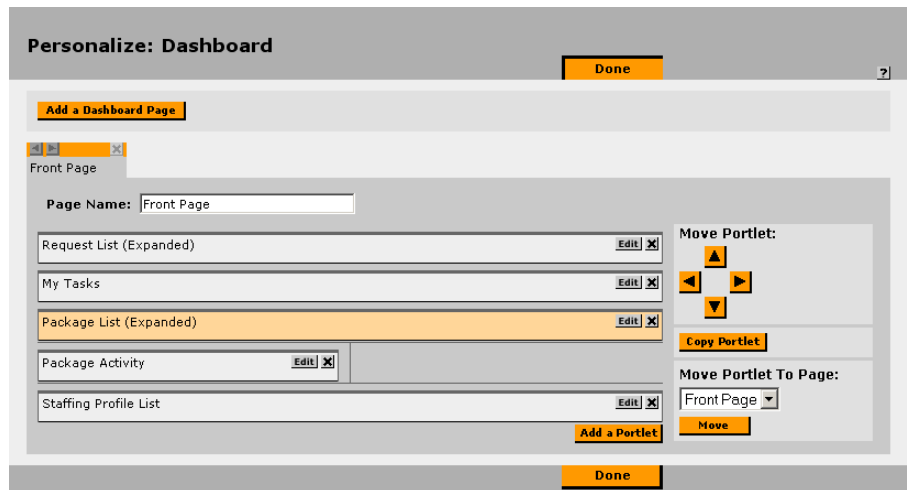


4. Add the portlet. The following lists the two ways to add a portlet:
  - a. In the **PORTLET NAME** field, enter some or all of the portlet's name.
  - b. Click the **FIND PORTLET** button. A list of portlets is returned matching the search criteria.
  - c. Select the portlet to be added to the Dashboard.
  - d. Click the **ADD** button. The portlet is added to the Dashboard page.

or

  - a. From the **PORTLET CATEGORY** drop-down list, select a category. The drop-down list identifies the available groupings for portlets. (For example, **COST MANAGEMENT**.)
  - b. Click the **FIND PORTLET** button. A list is returned of portlets associated with the chosen portlet category.
  - c. Select the portlet to be added to the Dashboard.
  - d. Click the **ADD** button. The portlet is added to the Dashboard page.

5. Move the portlet to the area where it should appear on the Kintana Dashboard. Select (highlight) the portlet to be moved and click the directional arrows to move the portlet in that direction.



Additionally, portlets can be moved to an entirely different Dashboard page using the **MOVE PORTLET TO PAGE:** drop down list and **MOVE** button.

6. Personalize the portlet. Highlight the portlet and click the **EDIT** button. The portlet edit page is returned. (For information detailing how to personalize a portlet, see *“Personalizing a Portlet”* on page 42.)
7. Once the portlet is positioned and personalized, click the **DONE** button. The new portlet now appears on the selected Dashboard page in a position corresponding to the selected layout area.



Note

Because each portlet can be configured to provide a very specific view into a business, data, a user might want to add the same portlet to a Kintana Dashboard multiple times with different configurations.

## Personalizing a Portlet

Portlets can be personalized to show information relevant for each user. For example, a manufacturing manager might want to see information related to recently recorded critical production defects. The manager could select the REQUEST LIST portlet on the Kintana Dashboard (which provides visibility into

the system capturing those defects). The manager could then personalize the REQUEST LIST portlet to show all HIGH and CRITICAL priority requests assigned to his team members.

To personalize the content displayed in a portlet:

1. Logon to the Kintana Dashboard. See *“Logging On and Off the Dashboard”* on page 33.
2. In the portlet to be personalized, click the **EDIT** button (**Edit**). The **EDIT** button is located in the top right corner of the portlet. The portlet’s edit page opens.

Note

The fields in the FILTER BY section are different for different portlets.

3. Select a title for the personalized portlet. In the **TITLE:** field, enter a new name for the portlet.
4. Select what information will be displayed.
  - a. Go to the **FILTER BY** heading.
  - b. Enter the appropriate information in the fields.
5. Select how to display the information.
  - a. Select a value from the **SORT BY** field.

- b. Select either **ASCENDING** or **DESCENDING**.
  - c. Enter a number in the **MAXIMUM RESULTS DISPLAYED** field. The portlet will only display that many results at one time. Any remaining results can be accessible by clicking the **MAXIMIZE** button at the bottom of the portlet.
  - d. Select the fields to be displayed.
6. Click **DONE**. The portlet now displays only information configured to be displayed.



Note

Because each portlet can be configured to provide a very specific view into a business' data, a user might want to add the same portlet to a Kintana Dashboard multiple times with different configurations.

## Accessing the Project Overview Page

The **PROJECT OVERVIEW** page provides a one-stop view into project-specific data. To access the **PROJECT OVERVIEW** page:

1. Logon to the Kintana Dashboard. See [“Logging On and Off the Dashboard”](#) on page 33.
2. Find a project name.



Note

There are several ways to find a project name. For example: project names are part of the Project List portlet. Project names can also be found the **SEARCH -> PROJECTS** menu.

3. Click the project name. The **PROJECT OVERVIEW** page for the selected project is returned.



The screenshot displays two portlets from the Kintana Dashboard. The 'Project List' portlet at the top right shows a table of projects with columns for Project Name, % Complete, Project State, and Sched Finish. A red dashed arrow points from the 'Project List' portlet to the 'Project Overview' portlet below it.

Project Name	% Complete	Project State	Sched Finish
4.0/4.5 Patches	91	Active	12/6/02
4.6 Patches	91	Active	6/6/03
5.0 Performa...	75	Externa...	7/30/03
5.0 Project ...	29	Active	12/24/03
5.5 Caching ...	46	Active	5/14/03

The 'Project Overview' portlet for '5.0 Project Plan' includes the following information:

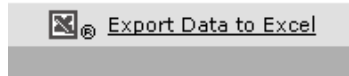
- Project Name:** 5.0 Project Plan
- Project State:** Active
- % Complete:** 29%
- Project Manager:** Brian James; Chad Haftorson
- Description:** Imported From MSP 2000 Project Plan
- Sched Start:** 5/28/02
- Sched Finish:** 12/24/03
- Program Name:** Release 5.5 Development Program
- Program Manager:** mandy richau

The 'Project Overview Gantt' chart shows a timeline from 2002 to 2004, with a bar representing the project duration from Q2 2002 to Q1 2003.

## Exporting Data to an Excel Spreadsheet

This section details how to export data from some portlet pages or search results pages into an Excel spreadsheet. To export data to an Excel spreadsheet:

1. Logon to the Kintana Dashboard. See *“Logging On and Off the Dashboard”* on page 33.
2. Select a portlet or a search results page with the **EXPORT DATA TO EXCEL** icon.



- From the selected portlet, click the **EXPORT DATA TO EXCEL** icon. The function streams to a temporary .xls file on the client's workstation. A new browser window opens, pointing to temporary .xls file. Perform any standard Excel function, including a save of the file.

The screenshot shows a Microsoft Internet Explorer browser window displaying an Excel spreadsheet. The address bar shows the URL: <http://ferrari.kintana.com/kintana/web/knta/global/portlet/PortletMaxExcelExport.jsp?exportTime>. The spreadsheet has a title bar 'Title' and a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Data', 'Go To', 'Favorites', and 'Help'. The spreadsheet content is as follows:

Req #	Request Type	Priority	Application	Demand Disposition	Department	Assigned Group	Assigned User
30132	DEM - Application Bug	Low	ERP	New	Manufacturing		
30112	DEM - Application Bug	Normal	CSM	New	Manufacturing		
30125	DEM - Application Bug	Low	HR	New	Finance		
30110	DEM - Application Bug	High	CSM	Scheduled	Finance		
30111	DEM - Application Bug	Low	CSM	New	Finance	Kintana User	

## Accessing Kintana Help

To access the Kintana Help:

- Logon to the Kintana Dashboard. See [“Logging On and Off the Dashboard”](#) on page 33.
- On the menu, select the **HELP** menu heading. The **HELP** menu items are displayed.
- Under the **HELP** menu heading, select **CONTENTS AND INDEX**. The Kintana Help is returned.

# Appendix

# A

## System Portlets

System portlets are configurable, role-based visual displays providing relevant summary information of the user's business data. Each user can select which portlets they want to display on their Dashboard page. Users can then personalize those portlets to display only information relevant to their specific Cost, Demand, Package, Program, Project, Request, Resource or Time. The following lists the categories of system portlets:

- Cost Management portlets are listed and described in [Table A-1](#)
- Demand Manager portlets are listed and described in [Table A-2](#)
- Package portlets are listed and described in [Table A-3](#)
- Program portlets are listed and described in [Table A-4](#).
- Project portlets are listed and described in [Table A-5](#)
- Project Overview portlets are listed and described in [Table A-6](#)
- Request portlets are listed and described in [Table A-7](#)
- Resource Management portlets are listed and described in [Table A-8](#)
- Time Management portlets are listed and described in [Table A-9](#)

Note

Not all users can view and access all portlets. Portlet access depends on:

- The appropriate Kintana licenses.
- The appropriate portlet access (Security Group setting).

*Table A-1. Kintana Cost Portlets*

<b>Kintana Cost Management Portlets</b>	<b>Description</b>
Budget To Budget Comparison	Displays a Budget to Budget Comparison bar chart. Allows a comparison of one or more Allocation Budgets to one or more Allocated Budgets. This allows users to compare one budgeted allocation to another.
Cumulative Cost Metrics (Program)	Displays a trend chart analyzing the cumulative cost metrics for a Program. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Cumulative Cost Metrics (Project)	Displays a trend chart analyzing the cumulative cost metrics for a Project. The trend chart contains line graphs indicating historical values of important cost parameters. Drill down from the trend charts to analyze the trend chart as required. Budget actuals include the Total Baseline Planned Cost and the Estimated Actual Cost at completion.
Current Cost Metrics (Program)	Displays an analysis of the Current Cost Metrics for a Program. Displays a bubble chart analyzing the current cost metrics for a Program. The bubble chart can be used to show current cost status of a project or current cost status of a program.
Current Cost Metrics (Project)	Displays an analysis of the Current Cost Metrics for a Project. Displays a bubble chart analyzing the current cost metrics for a Project. The bubble chart can be used to show current cost status of a project or current cost status of a program.
Project Cost Summary	Displays a list of cost information for a Project.

Table A-2. Kintana Demand Management Portlets

<b>Kintana Demand Management Portlets</b>	<b>Description</b>
Assignment Queue	Provides a personalized view into the Demand that has not been assigned to a resource. This portlet assigns a Kintana user as a resource to a Request.
Consolidated Demand	Provides a graphical overview of the Demand placed on an organization.
Demand by Category	Provides a quick view into different areas of Demand. This portlet provides a quick, graphical Demand summary and can be grouped by DEPARTMENT, DEMAND TYPE, PRIORITY, etc.
Demand List	Provides a personalized list of the demand placed on an organization or individual. This portlet can be personalized to display demand filtered based on specified criteria (DEMAND TYPE, PRIORITY, DEMAND DISPOSITION, etc.)
SLA Exception Roll Up	Lists the open Requests that have triggered SLA exceptions. The Service Level Agreements are configured using Request Type rules. The portlet displays the active SLAs related to a Demand, highlighting the violations in red.

Table A-3. Kintana Packages Portlets

<b>Kintana Packages Portlets</b>	<b>Description</b>
My Packages	Displays all Packages created by or assigned to the current user. Users can drill down on any Package to view its details, such as the Workflow status and Package Lines. This portlet provides a critical view into the most pressing Packages.
Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Users can drill down on any Object Type or Environment to view the included Packages.

Table A-3. Kintana Packages Portlets

Kintana Packages Portlets	Description
Package List	Displays general information about Kintana Packages, such as their description and status. This portlet can be personalized to display information based on various Package related criteria. This enables users to display only the Packages that are relevant to their personal activities.
Package List (Expanded)	Displays general information about Kintana Packages, such as their description and status. This portlet can be filtered for the same Package criteria as the Package List portlet, but displays more detailed Package information on the Dashboard.
Package Reference	Displays the References that are attached to the Package based on filters such as Reference Types, Relationship, and the time period when they were added.
Package Summary Bar Chart	Displays information in the form of a bar chart about groups of Kintana Packages, including priority, 'ASSIGNED TO' user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages that comprise the group's total number.
Package Summary Pie Chart	Displays information in the form of a pie chart about groups of Kintana Packages, including priority, 'ASSIGNED TO' user, Workflow, and the total number of Packages for each category. Users can drill down on any group of Packages and see the individual Packages that comprise the group's total number.
Pending Deployment	Displays general information about Kintana Packages which have not been deployed. This portlet provides visibility into scheduled or required Package migration.

Table A-4. Kintana Program Portlets

Kintana Program Portlets	Description
Program Cost Summary	Displays an overview of the Project Cost Health. Cost overview summarizes labor, non-labor and total expenses set against baseline, planned and actual costs. The EARNED VALUE SUMMARY includes the PLANNED VALUE, SCHED VARIANCE, EARNED VALUE, COST VARIANCE, ACTUAL COST, SPI AND CPI.
Program Issue List	Displays a list of program issues. This portlet can be personalized to display program issues based on project, escalation level, priority, status or other Program related criteria. This enables users to display only the Programs that are relevant to their personal activities.
Program List	Displays general information about Programs, such as program priority, program state and issues. This portlet can be personalized to display information based on PROGRAM NAME or other Project related criteria. This enables users to focus on and display only the most relevant Program data.
Program Project List	Displays the Project List of a Program. The portlet is configured with default parameters to show all project items for the program so that the portlet can be used without personalizing the portlet. The project items are sorted by the project hierarchy and optionally, by name, resource, state, scheduled finish, and project hierarchy.
Program Resource Request List	Displays a list of program resource requests. This portlet can be personalized to display program resource requests based on, PRIORITY, STATUS, ASSIGNED TO AND ASSIGNED TO GROUP. This enables users to display only the Resource requests that are relevant to their personal activities.
Program Risk List	Displays a list of program risks. This portlet can be personalized to display program risks based on project, escalation level, priority, probability, impact level or other Program related criteria. This enables users to display only the Program Risks that are relevant to their personal activities.

*Table A-4. Kintana Program Portlets*

Kintana Program Portlets	Description
Program Scope Change List	Displays the List of a Program's Scope Changes. The sequence, Tasks and project name are displayed, as well as the values for the project and baseline pair selected of the four schedule fields. The four fields are: SCHEDULED START, SCHEDULED FINISH, SCHEDULED DURATION and SCHEDULED EFFORT.

*Table A-5. Kintana Projects Portlets*

Kintana Projects Portlets	Description
My Tasks	Displays all Project Tasks currently assigned to the user that have a scheduled finish date two weeks from the current date. This portlet provides a critical view into the most pressing Tasks and nearing deadlines.
Project Budget and Staffing Profile vs. Actuals	Displays a summary of project performance relative to budgetary constraints. Values are for the entire project to date. This portlet is intended to provide dashboard-level oversight into the status of a group of projects. The intended audience is PMO staff or external stakeholders. Budgeted values for cost and hours are drawn from a budget, not from a project baseline. Actuals for cost are gathered from the budget. Actuals for hours are aggregated from Tasks assignments and Tasks actuals on the project linked to the budget. Percent complete is similarly drawn from the project actuals.
Project Gantt	Displays a Gantt chart for all Projects assigned to resources. The default values show Projects scheduled for the next two weeks.
Project List	Displays general information about Kintana Projects, such as how close they are to completion and their scheduled finish date. This portlet can be personalized to display information based on Project Name or other Project related criteria. This enables users to focus on and display only the most relevant Project data.



Table A-5. Kintana Projects Portlets

Kintana Projects Portlets	Description
Project List (Expanded)	Displays general information about Kintana Projects, such as how close they are to completion and their scheduled start and finish date. This portlet can be filtered for the same Project criteria as the PROJECT LIST portlet, but displays more detailed information on the Dashboard.
Project Summary Pie Chart	Displays a pie chart that rolls up a group of projects and displays them grouped by their summary condition. Users have the option to either select a set of specific projects and subprojects, or filter by DEPARTMENT and/or PROJECT MANAGER fields.
Resource Gantt	Displays a Gantt chart for all work items assigned to resources. Work items are differentiated by color, with Tasks remaining the same color as in the project Gantt chart and requests being a different color. The default values show Tasks and requests scheduled for the next two weeks. The work items are labeled by having the resource displayed to the right of the work item. This is necessary if there are multiple resources or a resource group specified.

Table A-6. Kintana Project Overview Portlets

Kintana Project Overview Portlets	Description
Project Cost Summary	Displays a list of cost information for a Project if the Project has Cost Management setting enabled. This portlet information is restricted if the user do not have the appropriate cost security.
Project Exception Detail	Displays information about the current Project's exceptions, stating the Violation, Tasks State, Start and Finish Dates, and the assigned Resource.

*Table A-6. Kintana Project Overview Portlets*

<b>Kintana Project Overview Portlets</b>	<b>Description</b>
Project Exception Summary	Displays relevant exception information about the Project. Exception rules are configured by the Project Manager using the Kintana Drive Workbench. The portlet is configured with default parameters to show all exceptions for the project so that the portlet can be used without personalizing the portlet.
Project Milestones	Displays a list of milestones within a project. The portlet is configured with default parameters to show all milestones for the project so that the portlet can be used without personalizing the portlet.
Project Overview Gantt	Displays a Gantt chart in the PROJECT OVERVIEW page.
Project References	Displays the References that are attached to the Project based on Reference Types, Relationship, time period when they were added, and whether or not they are preventing actions on Tasks. The portlet is configured with default parameters to show all References for the project so that the portlet can be used without personalizing the portlet.
Project Related Actions	Displays links to related Assignments and Staffing Profiles.
Project Summary	Provides a quick status for the selected Project or Subproject, including information on the Project State, Percent Complete, Project Manager and Start and Finish Dates.
Subprojects and Tasks Summary	Displays information about the current Project's Subprojects and Tasks: when there are exceptions, how close it is to completion, and the scheduled start/finish dates.

Table A-7. Kintana Requests Portlet

Kintana Requests Portlets	Description
My Requests	Displays all Requests created by or assigned to the current user. This portlet provides a critical view into the most pressing Requests and nearing deadlines.
Open Requests by Priority	Displays a bar chart of the number of Requests currently open, grouped by priority. This portlet provides a graphical representation to help the user visualize and group a business' open issues.
Request Activity	Displays general activity information such as the number of Requests opened and closed during the last two weeks, and the number of open Requests. This portlet provides visibility into high traffic Request Types as well as the groups or users assigned to address them.
Request List	Displays general information about Requests, such as their description and status. This portlet can be personalized to display information based on specific Request numbers or other Request related criteria. This enables users to display only the Requests that are relevant to their personal activities.
Request List (Expanded)	Displays general information about Kintana Requests, such as their description and status. This portlet can be filtered for the same Request criteria as the REQUEST LIST portlet, but displays more detailed REQUEST INFORMATION.
Request References	Displays the References that are attached to the Request based on filters such as Reference Types, Relationship, and the time period when they were added.
Request Summary	Displays information about groups of Kintana Requests, including priority, type, status and the total number of Requests for each category. Users can drill down on any group of Requests and individual Requests of the group's total number.
Request Summary Bar Chart	Displays a bar chart that allows users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests that bar represents.

*Table A-7. Kintana Requests Portlet*

<b>Kintana Requests Portlets</b>	<b>Description</b>
Request Summary Pie Chart	Displays as a pie chart information that allows users to easily see rolled up information about requests they choose. The chart supports click-through, so the user are able to click on any of the bars bringing the user to a list of Requests that bar represents.

*Table A-8. Kintana Resource Management Portlets*

<b>Kintana Resource Management Portlets</b>	<b>Description</b>
Analyze Assignment Load	Compares capacity (resource calendars X resource workload capacity) to assignments (requests, Tasks, and staffing profiles marked "treat as assignments." It is used to assess upcoming load on resources, in support of manual load leveling.
Analyze Resource Pools	Analyzes the resource pools. This portlet compares capacity (active resource pools) to load (lines on active staffing profiles that draw from these resource pools). The portlet is used to assess planned load on resource pools, in support of strategic resource planning.
Compare Project and Staffing Profile	Compares a Project to the staffing profile. This portlet compares capacity (as the set of active staffing profiles for a project) to assignments within the Project. The portlet is used either by the project manager or by resource managers in charge of planning staffing profiles to monitor compliance of the project plan and actuals to organizationally agreed staffing levels for the Project.
Current Resource Load by Organization	Displays the current resource load by Organization. Organization unit or skill name is a link to the related detail page. Note that to support breakdowns it is desirable to sort the list by organization hierarchy structure.

Table A-8. Kintana Resource Management Portlets

Kintana Resource Management Portlets	Description
Current Resource Load By Skill	Displays the current resource load by skills. This portlet displays a snapshot of current load on a set of resources, broken down by the skill booked on the work item. Note that when skill is not specified during the booking process, it will default to the resource's primary skill.
Resource Assignment	Displays a list of assigned resources and their related assignments and statues including: Open Tasks, Task Effort, Open Reqs and Open Pkgs.
Resource Pool List	Displays a list of resource pools. Listings include following columns: Resource Pool, Resource Pool is for, Status, Active, Start and Finish. Columns are configurable.
Staffing Profile List	Displays staffing profiles. This portlet allows flexible filtering so that the desired set of staffing profiles can be drawn out and presented. Filters include: Specific staffing profile name(s), department, workload type, status (multi-select), start date after, finish date before, and total hours above.

Table A-9. Kintana Time Management Portlets

Kintana Time Management Portlets	Description
TMG - Actuals for Direct Reports	Displays the total time entered by all the direct reports for a specific manager or set of managers.
TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.
TMG - My Work Items	Displays all Work Items created by or assigned to the current user. This portlet provides a critical view into the most pressing Work Items and nearing deadlines.

Table A-9. Kintana Time Management Portlets

Kintana Time Management Portlets	Description
TMG - Resource Group Total by Work Item	Displays a snapshot of current load on a set of teams. Teams are organization units. By selecting both a particular organization unit and also the organization units beneath this unit, it is possible to display a departmental summary and team breakdown. This portlet is intended to provide dashboard-level summary of upcoming load. The intended audience is PMO staff or middle managers (responsible for coordinating several teams).
TMG - Resource Group Totals	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, letting the user see the level of activity (by time) in the current and previous period for these groups.
TMG - Resource Totals	Displays the time charged by a set of resources, letting the user see the level of activity (by time) in the current and previous period for these users.
TMG - Total Hrs by Work Item	Displays detail information on the time allocated to and the time charged for specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.
TMG - Work Allocation Details	Displays summary information on the defined work allocations. It is especially helpful to see which allocations are close to being used up or actually are over budget.
TMG - Work Item Set Budgets and Actuals	Displays summary information at the Work Item Set level. This portlet is useful to get a snapshot of which projects or types of activities the users are spending the most time on as well as where the most time is budgeted. Values are for the entire project to date (as opposed to period-by-period). This portlet is intended to provide dashboard-level oversight into the status of a group of projects. The intended audience is PMO staff or external stakeholders. For this portlet, the budgeted values for cost and hours are drawn from a budget, not from a project baseline. Actuals for costs are gathered from the budget.

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