KINTANA[®] Working with Projects

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Chapter Introduction to Kintana Drive

Kintana Drive enables organizations to streamline and standardize the management of project activities using a template-based, collaborative approach. Projects and initiatives are defined as a hierarchical structure of projects and subprojects that logically group and organize tasks or activities. Kintana Drive defines the step-by-step processes required to complete specific project tasks and deliverables. Organizations can easily manage project activities within and across the technology chain because all project team members, whether internal or external, collaborate and interact through an intuitive interface. The underlying product framework guides users through a dynamic, self-documenting process to support activities such as the execution of standardized checklists or the collection of deliverables using document attachments.

For example, when creating a new and updated version of a business system, a company would classify its efforts into subprojects for each major functional area. Each of these functional subprojects could be further broken down into tasks directed to areas such as web content, application and database tasks. These tasks would be linked to Requests and Packages from Kintana Create and Kintana Deliver, giving instant visibility to more detailed activities supporting an overall project. Kintana Drive also supports standard integration with Microsoft Project so that functions such as task scheduling and resource management can be utilized at any point during a project.

The following sections discuss:

- Kintana Drive Features
- Manual Conventions
- Additional Resources

Kintana Drive Features

Kintana Drive features the following elements and advantages to effectively manage enterprise initiatives:

- Projects
- Easy Accessibility
- Increased Visibility
- Project Status Evaluation
- Project Execution
- Project Planning and Scheduling
- Knowledgebase for Resolution and Reporting
- Integration with Other Solutions

Projects

A Project is a compilation of information -- tasks, subprojects, action items, notes, Packages, Requests, and references -- which is used to define and manage a specific business initiative within your company. Projects are active entities, gathering additional information as the Project moves through its lifecycle. Project managers add or modify tasks or Action Items as issues arise, and team members update their individual statuses as they complete assigned tasks. Projects formalize the definition and processing of business initiatives and provide an easy-to-use interface for viewing key business activities. Projects can be used to manage business initiatives and projects such as mergers and acquisitions, or ISO 9000 certification. Projects can also be used to manage key operational activities in your organization such as new hire processing or software development.

Projects can be used within other Project definitions. Therefore, it is important to distinguish between the different Project levels. Projects are either Master Projects or subprojects. Subprojects are Projects that create hierarchy within a Master Project by establishing logical groups of tasks and Projects. These groups help to break up Master Projects into manageable pieces. Master Projects are groups of tasks and/or subprojects defining a business initiative. Master Projects are any Projects that are not used in other Project definitions as subprojects.

Easy Accessibility

Built using 100% pure Java technology, Kintana Drive is accessible through any standard Web browser. Intelligent defaulting of data lets you quickly define a project. You can control access to Kintana Drive at the user logon stage. This lets you restrict users from performing certain tasks and allows you to control access to mission critical information.

Kintana Drive features both a Java (Workbench) and an HTML interface for project processing. Using the Kintana Workbench, Drive's power-licensed users can utilize the full range of Kintana Drive functionality, defining and managing projects. While the Workbench provides comprehensive access to the Kintana functionality, the HTML interface provides the Drive end user with an easy and convenient method for processing their tasks. Using the Drive HTML interface, end users can quickly and efficiently monitor and update their task statuses and references to documents, Requests and Packages.

Increased Visibility

Kintana Drive provides all project team members with complete, real-time visibility over all initiatives in the enterprise at any level of summarization or detail. Kintana Drive also optimizes and simplifies the way contributors provide updates and view projects based on the relevance to their roles. For example, minor contributors can provide limited input into a project to shield them from the complexity of the overall initiative. Program managers can work with several initiatives at a time and track them to high level milestones. They can also drill down to any level of detail.

Kintana Drive also features Gantt charts, which afford easy visualization for projects and individual resources. Milestones and the project critical path can be displayed in a Gantt chart, providing managers with a quick one-stop summary for a project as it progresses through its life cycle.

Automatic notifications can be proactively sent to project team members when they are required to act on a specific task. Notifications can also be configured to be sent to managers at key points in the project cycle, reporting on critical status updates and completed tasks and deliverables. Notifications are used to speed up review and approval processes by sending emails to the appropriate reviewing parties immediately upon key task completion, or when tasks are in a state requiring attention.

Kintana Drive provides an additional level of project efficiency when used in conjunction with the Kintana Dashboard. The Kintana Dashboard is a highly configurable application that offers greater visibility and control over projects and tasks. 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 tasks.

Project Status Evaluation

Kintana Drive features several new pieces of functionality that are designed to enhance the project status evaluation duties of project management. Enhanced features include a project summary, exception rules, hierarchy, and details.

The project summary provides a high-level view into the status and details of a project, such as the project manager name and scheduled start and finish dates.

Exception rules provide criteria for evaluating risks and variables that may come up during the course of a project lifecycle. When these identified risks occur, project managers can see them in a timely and highly visible manner. This minimizes the impact that these risks might have on the overall project completion date.

The project hierarchy works in conjunction with the project summary to display the entire project structure, including subprojects and tasks. This provides project managers with an additional view into a project without having to drill down in to further detail.

The project details page is where project managers can drill down to any level of a project in order to collect vital project and task information in a timely and responsive manner.

Project Execution

Kintana Drive features specific functionality that enhances the project execution duties of project managers and participants. This allows the project manager greater control over the project once project activities have already begun. Enhanced features include state change notification, task progress, and task details.

The state change notification is an automated process within Kintana Drive. This ensures that project managers are properly and promptly informed about all state changes that may occur.

Task progress is now easily and instantly accessed through the My Tasks portlet. This feature enables project participants to directly update their own task status, thereby eliminating any extra effort a project manager might need in order to assess a participant's task progress. The task details page is where both managers and participants can drill down to any level of a task in order to collect and update vital task information, including any predecessors that may be holding up task completion.

Project Planning and Scheduling

Kintana Drive features several pieces of functionality that are designed to enhance project scheduling and planning. Project managers have greater control over the project planning phase. Features include project plan revision, project templates, duration-based scheduling, and resource calendar.

Project plan revision allows project managers the ability to plan and revise portions of a project while it is currently in progress. This makes the project management more accurate and up to date by emulating real life project development in which changes can occur during the project life cycle. By making project planning and tracking more accommodating, project plan revision gives the project manager complete control over the entire process from start to finish.

Project templates allow project managers to establish reusable processes, set defaults, configure custom fields, and set up parameters. This reduces the amount of time and resources needed to establish and run a project.

Duration-based scheduling allows project managers to schedule projects and subprojects more efficiently. Also, if task or date changes occur, Kintana Drive will prompt the project manager to revise the schedule to reflect those changes. This ensures that the project plan is always up to date and still manageable.

The resource calendar is used by project managers to record company working and non-working days. This information is then used by the scheduling engine to aid in determining project start and finish dates.

Knowledgebase for Resolution and Reporting

Kintana Drive's robust knowledge repository can capture all relevant data for all business initiatives. Reports can show past, current, and newly entered projects, and the references to the Requests and Packages in Kintana Create and Kintana Deliver.

Kintana Drive can generate both graphical Decision Support System reports and character-based reports. Custom reports can be designed for special needs. Reports can be scheduled to run at specified intervals and then distributed automatically to relevant parties. Report data can be exported easily to a spreadsheet for further analysis. Kintana Drive can also generate reports using a reporting Meta Layer that allows for the creation and viewing of reports through any major third party reporting tool. Kintana Drive users can gain a higher level of visibility and control over all business products managed by Kintana Drive by leveraging leading reporting tools in an easy and well-organized fashion. The Reporting Meta Layer is designed to act as a complement to the Kintana solution.

Integration with Other Solutions

Kintana Drive integrates with other solutions in the Kintana Product Suite and with third-party applications such as Microsoft Project 2000. This enables Kintana Drive to extend its scheduling and tracking capabilities to other products, allowing increased visibility into the progress of Requests and Packages, as well as Projects and Tasks.

Integration with the Kintana Product Suite

Kintana Drive integrates with other products in the Kintana Product Suite in the following ways:

• Kintana Create Requests can be linked directly to Projects or Tasks. The Request contains all the information that is required to bring the Request to closure. By associating Requests with a Project, Project Managers can track other company issues which might affect the Project's success.

Project Managers can also create a Task from a Request in the Project Plan panel. Once created, the Task will have a Reference to the originating Request.

- Kintana Deliver Packages can be linked to Projects or Tasks. Packages contain all the information that is required to deploy software changes. By associating Packages with a Project, Project Managers can track other company issues related to software change management which might affect the Project's success.
- When used in conjunction with Kintana Drive, the Kintana Dashboard offers greater visibility and control over Projects and Tasks. Project Managers can use the Dashboard for real-time status and exception information on their initiatives.

Integration with Microsoft Project

Kintana Drive can be integrated with Microsoft Project 2000. The Kintana Drive - Microsoft Project integration allows Project Managers to:

- Synchronize project information in a Kintana Drive Project with the project information in a Microsoft Project 2000 Project file. A Synchronization Wizard guides the PM through the process.
- Export project information from Kintana Drive to Microsoft Project using the Export Wizard.
- Import project information from Microsoft Project to Kintana Drive using the Import Wizard.

Manual Conventions

The following conventions are used when presenting information which refers to Kintana products user interface components in text:

- All Kintana Drive buttons, tabs, menu items, and any system data selected from a drop down list or auto-complete list are depicted in **bold** 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.
- Various fields appearing in different windows and frames are described in tabular form with columns containing the name, the type, whether the field is required or optional, and a description of the field.
- Images of Kintana screens used throughout this book may vary slightly from your installation depending on your configuration changes and which Accelerator(s) 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.



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

The following sections define the common concepts and terms related to Kintana Drive. Knowledge of these terms will help the reader gain a more thorough understanding of Kintana Drive usage and Project processing.

The following entities are discussed:

- Projects
- Project Templates
- Project Team
- Resources
- Tasks
- Master Projects
- Subprojects
- Gantt Charts
- Milestones
- Critical Path
- Action Items
- Project States
- Exceptions
- Summary Conditions
- Notifications
- Scheduling Engine and Calendar
- Baseline

- Cost Management
- Budget
- Requests
- Packages
- References
- Kintana Dashboard (Drive)

Projects

A Kintana Project is a compilation of information -- Tasks, Action Items, Notes, Packages, Requests, and References -- which is used to define and process a specific business initiative within your company. Projects are active entities, gathering additional information as the Project moves through its life. Project Managers add or modify Tasks in the Project Plan as issues arise, and team members update their individual statuses as they complete assigned Tasks. Projects formalize the definition and processing of business initiatives and provide an easy-to-use interface for viewing key business activities. Projects can be used to define such initiatives as mergers and acquisitions, ISO 9000 certification, eCommerce initiatives, new hire processing, or software development.

🙋 Proj	ect : C	Development Laptop Upgrade				
Pla	an	Cost EV Analysis Baseline	36		Gantt Ch	art: 🔉 🔍 🔝 Display Options
Seq	1	Name	State	R	2003 May Jun	Jul
1		Development Laptop Upgrade	Active	johr		
2		⊡…Initial Assessment	Active	johr		1
3		Determine Laptop Usage	Completed	johr		
4			Completed	jane	→ janesmith;jakesmith;johnsmith	
5		Cost Analysis	In Progress	julie		iesmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec	johr		johnsmith
7		🗄 Upgrade Laptops	Active	johr		
8		Image Old Machines	Pending Predec	julie		Illiesmith;josesmith;jake
9		Perform Upgrade	Pending Predec	jane		janesmith;jakes
10		Test Stability	Pending Predec	julie		l∍ <mark>li</mark> µliesmith
11		Roll-Out	Pending Predec	johr		ւ <mark>թ⊟ յ</mark> րհոsm
12		Lessons Learned	Pending Predec	julie		🤟 julie
			I		<u> </u>	•
			All			Kerresh Schedule Project
Task	0	Add				OK Bave Cancel

Figure 2-1 Project window

Project Templates

Project Templates are reusable collections of Project parameters and processes that can be applied to any Project in order to allow project managers to rapidly create customized project plans. The Kintana Project Template Workbench captures basic Project Template information. This information helps to create reusable Project structures and hierarchies.

Using a Project Template to create a Master Project, Project Managers can choose to enable or disable fields, set Exception rules, determine which Indicators to display, determine scheduling settings, set up security restrictions, and edit custom fields. Project Templates can speed up the process of setting up a Master Project. A repeated set of Tasks can be bundled into a Project Template and applied to any Project while preserving its Notifications, Project Plan, and any custom fields it may have. Project Templates can also be used to add Subprojects to a Master Project.

Project Team

Project Managers can specify a pool of Kintana users and user groups to draw from when assigning Resources to a particular Project. These Project Teams can vary from Project to Project and are configured from the Project Settings window.

Settings for Developme	ent Laptop Upgrade					
MSP Synchronization	Cost Management	Resour	e Management	Time Manager	ment Baselines	
Project Fields	Exception Rules	Indicators	Scheduling	Security	Project Team	
This tab configures the Resources allowed to be picked in this Project if no Resource Group is specified. Check the checkbox below if you wish the Resources to be all the users with the Project option enabled in their Security Groups. If unchecked, the selection will be the Resources specified in the table below. If allow all Resources with the Project option enabled in their Security Groups to be picked in this project						
Username	First Name		Last Name	E	mail Address	
		Add	emove			
				ОК	Apply Cancel	
eady						

Resources

A Resource in Kintana Drive is a Kintana user who performs work tracked by Kintana. In an IT department, Resources can include permanent employees, contractors, consultants, and outsourcing firms. Resources are assigned Tasks and are able to update their Task statuses in Kintana Drive. They are chosen from the Project Team specified by a Manager. Resources can also have a Resource Rate that is useful in determining Project costs.

Tasks

Tasks are the actions within a Project that must be completed in order for the Project to complete successfully. As Project Managers need to gather data from Projects and make appropriate changes through the life of the Project, Tasks can be configured to deliver appropriate information. For example, Project Managers need to be notified when Tasks are completed or their state changes. Tasks also need to be modified as issues arise during the Project, such as extending their schedules or assigning additional resources to a Task to make a deadline. Team members update their individual statuses as they complete assigned Tasks.

Master Projects

Master Projects are groups of Tasks and Subprojects that define a business initiative. The Master Project allows Project Managers to determine which information they would like to track over the course of the Project. Using the Project Workbench to build a Master Project, Project Managers can choose to enable or disable fields, set Exception rules, determine which indicators to display, determine scheduling settings, and set up security restrictions.

Subprojects

Subprojects are Projects that create hierarchy within a Master Project by establishing logical groups of Tasks and Projects. These groups help to break up Master Projects into manageable pieces. By breaking up a Master Project, a Project Manager can use Subprojects to define security for a smaller set of Tasks within a Master Project. This is important when a Master Project is large or has numerous components. Assigning managers to Subprojects creates better visibility and control for the Project Manager.

Gantt Charts

Gantt charts graph a Project's Tasks in a form similar to a bar chart, plotted against a time axis that can be expanded or decreased for differing levels of

		Gantt Chart: 🤱 💁 🔛 Display Options
2003		
May	June	July
	janesmith;jakesmith;johnsmith	
		jµ iesmith;josesmith;johnsmith
		iphnsmith
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
		juliesmith;josesmith;jakesmith
		∫ <mark>→j</mark> anesmith;jakesmith
		↓ jµliesmith;jos
		→ jphnsmith
		🖡 julies
1		

detail. This provides Project Managers with visualizations of Projects that are easy to comprehend at a glance.

Milestones

A milestone is a significant event in a Project and often marks the completion of a deliverable. On Project Gantt charts, milestones appear as black diamonds. Since milestones are often markers, they generally do not have a duration associated with them, though they can be configured with durations if so desired.

Critical Path

The critical path of a Project is the longest path through the Project. It is comprised of a series of activities that determine the Project's duration. A Project's critical path can be recalculated at any time.

Action Items

Action Items are used to capture important "to do" items that do not require the formal definition, tracking and hierarchical restrictions of a Task. Each Action Item contains information on the specified item's priority and status. This information can be used to track and verify that all details related to the current Project are logged, tracked and eventually resolved. Action Items on Tasks can

be made "required," meaning a Task will not be allowed to be marked as **COMPLETE** until the Action Item is taken care of.

Project States

Project states are used to reflect the various stages of a Project lifecycle. Project Managers can move a Project into different states to facilitate the work associated with that stage of the Project, such as **ON HOLD**, **ACTIVE**, or **COMPLETED**. Project states also provide higher visibility to Project Managers by displaying which Projects can be updated or need their attention. Project Managers can change states at the Master Project, Subproject, or Task level at any time.

Exceptions

Exception Rules provide specific criteria for evaluating risks and variables that may come up during the course of a Project lifecycle. When these identified risks occur, they are prominently displayed. This minimizes the impact that these risks might have on the overall Project completion date.

Exceptions are triggered at the Task level. The Drive Summary Condition Indicator summarizes the Task exceptions for each Project and Subproject. Email notifications can be sent to the proper user if a Task triggers an Exception.

The Master Project is equipped with the following Exception Rules:

Exception Name	Rule
UNASSIGNED TASKS	No Resource is assigned, and the Scheduled Start Date occurs in X days. (X is a user-configurable number)
LATE TASKS	Task is not yet "Complete", and the current date is X days past the Scheduled Finish Date. (X is a user-configurable number)
TASKS STARTING LATE	Task is not yet "In Progress", and the current date is X days past the Scheduled Start Date. (X is a user-configurable number)

Table 2-1. Exception Rules for Master Projects

Exception Name	Rule
LATE ESTIMATED FINISH	Estimated Finish Date is more than X days past the Scheduled Finish Date. (X is a user-configurable number)
NOT ENOUGH TIME LEFT	Estimated Remaining Duration exceeds the time left between the current date and Scheduled Finish Date by X days. (X is a user-configurable number)
PREDECESSOR HAS EXCEPTION	Task directly preceding a milestone has triggered one of the above Exceptions.
CRITICAL PATH RUNNING	Task preceding a milestone on the Project critical path has triggered one of the above Exceptions.

Table 2-1. Exception Rules for Master Projects

The following Exception Rule parameters are configurable:

- Enabled Users can decide whether or not the particular Exception Rule is enabled.
- Rule Specifies the number of days the particular Exception Rule waits for or monitors.
- Include in Summary Condition Decides whether or not the violations of the particular Exception Rule are included in Drive's Summary Condition view (see "Summary Conditions" on page 21).

Exception Rule behavior can be set on the **Exception Rules** tab of the SETTINGS window, shown in *Figure 2-2*.

MSP	Synchronization	Cost Management	Resource	Management	Time Manage	ment B	aselines
Proj	ect Fields	Exception Rules	Indicators	Scheduling	Security	Project	Team
Project S 60 30	ummary %of Tasks must have %of Tasks must have	Exceptions to turn the Proje Exceptions to turn the Proje	ct Summary Conditi ct Summary Conditi	on 📕			<u>_</u>
Exception Enabled	n Rules Name	Rule			inc Co	lude in Summai ndition	Ŷ
2	Unassigned Tasks	No Resource is as: within 3 days	signed, and the Sch	eduled Start Date occ	urs 🔽	Ŧ	
2	Late Tasks	Task is not yet "Co days past the Sche	mplete", and the cur eduled Finish Date	rent date is 3	u.	Ĩ	
2	Tasks Starting Late	Task is not yet "In F days past the Sche	Progress", and the c eduled Start Date	surrent date is 3	.	7	
	Late Estimated Finish	Estimated Finish Da Scheduled Finish D	ate is more than 4	days past the	Г	1	
	Not Enough Time Left	Estimated Remainin	g Duration exceeds	the time left between	ithe 🗆	1	
					OK	Annia	Oeneel

Figure 2-2 Setting the Exception Rules

Summary Conditions

Summary Conditions summarize the Task exceptions for each active Project and Subproject. The Summary Condition View is a simple graphical indicator which is located next to the Project or Subproject name in the following locations:

- Results tab of the Project Workbench
- Project Plan Panel
- Project Search Results page in Kintana interface
- Project Summary portlet
- Project Details page

A Project's Summary Condition color begins green and changes to yellow or red depending on the percentage of Tasks that have Exceptions within a Project. This percentage is configurable by the Project Manager.

Green	0%
Yellow	30%
Red	60%

Table 2-2. Default Values for Triggering Color Change in Summary Condition



A Project Manager sets the threshold value for yellow to 30%. Four Tasks trigger an exception in a Project consisting of ten Tasks total. The Summary Condition View indicator turns yellow, and will remain yellow until at least two Tasks are reworked so they no longer have Exceptions (this could be accomplished by changing a start date, or modifying resources). Once this occurs, the Summary Condition indicator turns green.

The values for triggering color change in the Summary Condition can be modified on the **Exception Rules** tab of the SETTINGS window shown in *Figure 2-3*.

	Project Fields	Exception Rules	Indicators Scheduling Security Project	Team
I	-Project Summ	ary		
l	60 %of Ta	asks must have Ex	ceptions to turn the Project Summary Conditio	n 📕
	30 %of Ta	asks must have Ex	ceptions to turn the Project Summary Conditio	n 🛄

Figure 2-3 Modifying the Summary Condition

Notifications

Email notifications can be automatically generated whenever a state change occurs for a Task. Notifications can also be sent when a Task triggers an Exception. The automated notification system ensures that Project Managers and Task owners are properly informed of all changes that affect their work. Notifications can also be sent to inform users of the start/finish dates of Tasks.

Kintana Drive notifications will typically instruct the user to review or act on a Task. Notifications for Tasks are configured in the **NOTIFICATIONS** tab of the TASK window. Clicking **NEW** opens the ADD NOTIFICATION FOR TASK window shown in *Figure 2-4*.

🌺 Add Notifica	ation for Co	ost Analysis	X		
Setup Mess	age				
Coptions					
Description:					
Event:	Specific St	ate	•		
		State: ALL	•		
	Send rem	inder? O Yes 💿 No			
	Reminde	r Days:			
	🗖 Don't	send if obsolete			
Interval: 8:00 AM Daily M-F					
Enabled:	• Yes C) No			
। _Γ Recipients					
Recipien	t Type	Distribution Type	Recipient		
New Edit Delete					
Tokens			OK Cancel		
Ready					

Figure 2-4 Add Notification for Task Window

Figure 2-5 illustrates a sample Notification.

-	Drive Alert	
http://kintana.com/	00/1816/kintana.htm	
Notified Us	ers: John Smith	
Status change for T	ask: New Task	
Proj	ect: Test2	
Descript	ion: Test Task	

|-----

Figure 2-5 Sample Notification

Scheduling Engine and Calendar

Kintana Drive features several pieces of functionality that are designed to enhance Project scheduling and planning. Project Managers have greater control over the Project planning phase. Features include Project Plan revision, duration-based scheduling, Resource calendar, and enhanced Predecessor relationships.

Project Plan revision allows Project Managers the ability to plan and revise portions of a Project while it is currently in progress. This makes Project management more accurate and up to date by emulating real life project development in which changes can occur during the project life cycle. By making project planning and tracking more accommodating, Project Plan revision gives the Project Manager complete control over the entire process from start to finish.

Duration-based scheduling allows Project Managers to schedule Projects and Subprojects more efficiently. Also, if Task or date changes occur, Kintana Drive will prompt the Project Manager to revise the schedule to reflect those changes. This ensures that the Project Plan is always up to date and still manageable.

The Resource calendar is used by Project Managers to record company working and non-working days. This information is then used by the scheduling engine to aid in determining Project start and finish dates.

Projects and Tasks can also use external Projects and Tasks as predecessors, eliminating the need to create giant Projects to preserve relationships.

Baseline

A baseline is the original approved Project plan for a Project. As scope changes happen, the baseline is updated to reflect those changes as part of the approved plan. A Project Manager uses baselines to continuously monitor the health of their Project in terms of schedule and cost by comparing the current Project plan to the baseline plan. Multiple baselines of a single Project can be taken by a Project Manager and reviewed at any time.

Cost Management

Kintana Drive's Cost Management capability allows users to capture and track Planned and Actual cost information for their Projects, giving visibility into Project performance from a financial standpoint. Basic cost information can be captured on Projects and Tasks in the following areas:

- Planned Labor Cost: The dollar cost of a work item (typically a Task) which is a measure of the amount of scheduled effort on a Task. This figure is Task-specific and is rolled up to the Master Project. Calculated as: Planned Labor Cost = Sum of (Allocation * Resource Rate) for each Resource assigned to the Task.
- **Planned Non-Labor Cost**: The dollar cost of miscellaneous items needed to complete a work item . This is not a direct measure of the effort to be spent on a work item. This figure is Task-specific and is rolled up to the Master Project.
- **Planned Cost**: The total planned dollar cost represented by a work item. Calculated as: Planned Cost = Planned Labor Cost + Planned Non-Labor Cost.
- **Baseline Labor Cost**: The Labor Cost for a work item in the latest Baseline taken of a Project.
- **Baseline Non-Labor Cost**: The Non-Labor Cost for a work item in the latest Baseline taken of a Project.
- Baseline Cost: The total dollar cost represented by the latest Baseline taken of a work item.
 Calculated as: Baseline Cost = Baseline Labor Cost + Baseline Non-Labor Cost.
- Actual Labor Cost: The dollar cost of the work performed on a work item. Calculated as: Actual Labor Cost = Sum of Actual Effort * Resource Rate
- Actual Non-Labor Cost: The total of all miscellaneous costs accrued in completing a work item.
- Actual Cost: The total dollar cost incurred in completing a work item. Calculated as: Actual Labor Cost + Actual Non-Labor Cost.
- **Planned Value (PV):** The portion of the Baseline Cost planned to be spent between the Project's start date and the current date.
- **Earned Value (EV)**: The portion of the Baseline Cost for the entire Project that has theoretically been spent by the current date, measured as a function of the amount of work performed thus far. Calculated as: EV = Baseline Cost * % Complete
- **Cost Performance Index (CPI)**: The cost efficiency ratio of Earned Value to Actual Cost. CPI is used to calculate Projected Actual Cost for a Project. Calculated as: CPI = EV / Actual Cost
- Schedule Performance Index (SPI): The ratio of Earned Value to Planned Value. SPI describes what portion of the Project plan has been accomplished in terms of its Cost. Calculated as: SPI = EV / PV

Budget

A Budget indicates an allocation of money between specific start and finish dates. Between these dates, the Budget specifies the money available for each time period (usually a calendar month). Entries in a Budget can be set for labor or non-labor categories. Budgets can be associated with Projects or Organization Units.

Requests

Kintana Drive can integrate with Kintana Create to provide a comprehensive and powerful Project management and issue resolution system. Requests, the primary work unit of Kintana Create, can be linked directly to Projects or Tasks. The Request contains all of the information that is typically required to bring the Request to closure. By associating Requests with the Project, Project Managers can track other company issues which can affect the ultimate Project success. Project Tasks can also be created from Requests in the Project Plan Panel.

Packages

Kintana Drive can integrate with Kintana Deliver to combine the powerful Project management and change management tools featured in each Kintana product. Packages, the primary work unit of Kintana Deliver, can be linked to Projects or Tasks. The Package contains all of the information that is required to deploy and audit software changes to mission critical applications. By associating Packages with a Project, Project Managers can track other company issues related to software change management that could affect the outcome of the current Project.

References

Projects can include references to other entities or sources of information, allowing easy access and visibility to data related to the current Project. References can be linked to Projects or Tasks. Summary information for references is viewed as part of the Project. Each reference can be viewed in detail with a click of the mouse. There are several reference types available in Kintana Drive: Attachments, Document URLs, Requests, Packages, Tasks, and Projects.

References can also have dependencies associated with them; for instance, a Task can be configured to wait for a referenced Request to finish before being marked Complete. In addition, new Requests can be created from a Task as References in both the Kintana and Workbench interfaces.

New Reference Request (Existing) 💌 Add	
New Reference - Request (Existing)	×
Request No.:	III
Relationship: Related to this Task	•
Referenced Request is related to this Task	
Search	OK Cancel
Ready	

Figure 2-6 Adding an Existing Request as a Reference

Kintana Dashboard (Drive)

Kintana Drive provides an additional level of Project efficiency when used in conjunction with the Kintana Dashboard. The Kintana Dashboard is a highly configurable application that offers greater visibility and control over Projects and Tasks. 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 tasks.

Upon login to the Kintana Interface, users will see the Kintana Dashboard -- a collection of windows, or portlets, that comprise the Kintana Home page. Users who do not have access to the Dashboard will only see one summary level portlet for Drive: the My Tasks portlet. Users who have purchased the Dashboard will receive all of the following Drive related portlets:

- **My Tasks Portlet** (all users) Displays all Project Tasks currently assigned to the user that have a scheduled finish date within two weeks of the current date.
- **Project Budget and Staffing Profile vs. Actuals Portlet** Compares Budget and Staffing Profile plans to the actual cost and resource usage of running Projects.
- **Project List Portlet** Displays general information about Projects, including overall status of the Project, start and end dates.
- **Project List (Expanded) Portlet** Displays general information about Projects using a broader list of fields than the Project List portlet.
- **Project Summary Pie Chart** Displays Projects in the system according to their Summary Condition.
- **Project Overview Page** Contains the following portlets:
 - **Project Summary Portlet** Displays summary information about Projects, such as percentage complete and scheduled start and finish.
 - o **Project Exception Summary Portlet** Displays summary information about the status of Exceptions for the Project, and how many Tasks fit into each Exception category.
 - o **Project Exception Detail Portlet** Displays detail information about Exceptions for the Project, such as any Tasks that have violated Exceptions, the state of the Task and the Resource assigned to the Task.
 - o **Project Milestones Portlet** Lists the Milestones in a Project.

- **Project Overview Gantt Portlet** Displays the Gantt chart for a Project.
- **Project References Portlet** Displays detail information about entities referenced by the Project.
- o **Project Related Actions Portlet** Displays links to a Project's Assignment visualizations and Staffing Profiles.
- o **Subproject & Tasks Summary Portlet** Displays summary information about a Project's Subprojects and Tasks, such as percentage complete and scheduled start and finish.
- **Resource Gantt** Displays information on a Resource's workload including Project Tasks and assigned Requests.

Tabs in the Kintana Dashboard interface allow users to group portlets according to their own needs. To save time in configuration, your Kintana Administrator can define a default Dashboard layout for all users. For further adaptability, your Kintana Administrator can also create custom portlets to suit your particular business needs.

Chapter

Creating and Using Project Budgets

Kintana Drive's Cost Management capability allows users to capture and track Planned and Actual cost information for their Projects, giving visibility into Project performance from a financial standpoint. Budgets are a key component of Cost Management.

A Budget indicates an allocation of money between specific start and finish dates. Between these dates, the Budget specifies the money available for each time period (usually a calendar month).

Budgets in Kintana Drive have many key aspects that can be configured:

- A Budget can be associated with a Project or Organization Unit.
- A Budget has lines that can be modified individually.
- Users who can access the Budget can be specified.
- Budgets have states associated with them (New, Proposed, Under Review, etc.).



Budget amounts are always entered in terms of whole thousands.

The following sections discuss working with Budgets in more detail:

- Defining a Budget
- Modifying Project Budgets
- Comparing Budgets

Defining a Budget

The following sections discuss creating and configuring Budgets:

- Creating a Budget
- Associating a Budget with a Project
- Configuring Access to a Budget

Creating a Budget

To create a new Budget:

1. Log onto Kintana. From the navigation bar, select **CREATE -> BUDGET**. The CREATE A NEW BUDGET page opens.

Create a New Budget		
Budget Information		
*Budget Name:		
Time Range		
*Start Period: May 2003		
*Finish Period: July 2003		
	Continue	Cancel

2. Enter the BUDGET NAME, START PERIOD, and FINISH PERIOD. Click **CONTINUE**. The CREATE A NEW BUDGET: ENTER DETAILS page opens.

Create New Budget: Enter Details							
Configure Access							
Budget Information		Create Cancel					
Status: New	Active: CYes 🕫 N	10					
*Name: IT Integration Budget							
Created On: June 8, 2003	Created By: John Smith						
Description:							
This Budget is for:		This Budget rolls up to:					
C Organization Unit:	:= View	C Organization Unit Budget:	13 View				
O Program:	10 View	O Program Budget:	13 View				
C Project:	:E View	C Project Budget:	Hiew				
 Unspecified 		⊙ Unspecified					
Start Period: July 2003 Finish Pe	riod: September 2003	Change Periods					
Budget Breakdown							
Show: • Plan Only • Plan and A	ztuals Retresh	Budget Status: New					
Total Planned Budget: \$0	Budget Breakdown fi	rom July 2003 to September 2003					
Total Actual Budget: \$0	Q3 2003						
Modify Line Details Remove Lines	Jul Aug 600						
Type Category	Jui Aug Sep						
Please use the Add button to add lines to this Budget.							
Add Lines: 1 Add							
Month Total							
	0 0 0						
Quarter Total	0						
	**all numbers in the table	are in 1000's					
Notes							
Notes to be added on save:							
		Y					
		Constant Constant					
		Cancel					

- 3. (optional) Enter any desired information in the BUDGET INFORMATION section.
- 4. To add lines to the Budget, scroll down to the BUDGET BREAKDOWN section. Enter the number of lines you wish to add to the Budget and click ADD. The ADD LINES TO BUDGET page opens.

Add Lines to Budget: Sales Integration Budget						
Budget Information						
Name: Sales Integration Budget	Status: New					
Enter Line Information						
*Туре	*Category					
Labor						
	Add Cancel					

- 5. Specify a TYPE and CATEGORY for each Budget line and click **ADD**. The CREATE A NEW BUDGET: ENTER DETAILS page opens again, with the requisite Budget lines added.
- 6. Enter amounts for each Budget line and period and click SAVE.

7. (optional) If you wish to track actual amounts for your Budget alongside the planned amounts, click the PLANNED AND ACTUALS option in the SHOW line and click **REFRESH**. The CREATE A NEW BUDGET: ENTER DETAILS page will reload with ACT fields allowing you to fill in actual values next to the planned amounts in the Budget's columns.

Budget Breakdown								
Show: C Plan Only 💿 Plan and Actuals Refresh								
Total Planned Budget: \$6,000 Total Actual Budget: \$0 Budget Breakdown from May 2003 to July 2003								
		Q	2 2003					Q3 20
Modify Line Details Remove Lines		1	lay	Ju	ur	3	ul	Au
Type Category	A	ct Plan	Act	Plan	Act	Plan	Act	Plan
🗖 Labor Employee		1		1		1		
🗖 Non-Labor Hardware						1		
🗖 Non-Labor Software				2				
Add Lines: 1 Add								
Month Total		1	0	3	O	2	o	
Quarter Total		(Plan) 2.0	(Act) 0.0			(Plan)
**all purphers in the table are in 1000's							Þ	

Associating a Budget with a Project

A Budget can be associated with a Project from two places:

- Linking a Budget from the Modify Budget Page
- Linking a Budget from the Project Information Window

Linking a Budget from the Modify Budget Page

To link a Budget to a Project from the MODIFY BUDGET page:

- 1. In the Kintana interface, navigate to the Budget you wish to link.
- 2. Click **Modify Budget**. The Modify Budget page opens.

Modify Budget: Kintana I	Relea	ise 6.0)								
View Budget Modify Budget	Con	figure Acce	155								
Budget Information					_	Save		Cance	el		
Status: New 🔽 A	ctive:	œ.	Yes ON	lo							
*Name: Kintana Belease 6.0		1									
Created On: May 6, 2003 C	reated	By: Johr	n Smith								
Description:											
This Budget is for:				This B	udget ro	lls up to	:				
O Organization Unit:			¥iew	O Org	anization	Unit Bud	get:			iii View	
O Program:			View	C Pro	gram Bud	lget:				III View	1
Project: Kintana Release	9 6.0	:=	View	C Pro	ject Budg	et:				:= Yiew	1
O unspedneu				.e Uns	pecified						
Start Period: February 2003 Finish	Perio	1: July 20	003 🧧	hange Per	riods						
Budget Breakdown											
Show: Plan Only C Plan and Act	uals 📃	Refresh		Budg	et Status	:New					
Total Planned Budget: \$110,000	Budg	et Break	down fr	om Febr	uary 20	03 to Ju	ly 2003				
Total Actual Budget: \$0		01 2003	3		02 2003		0	3 2003			
Modify Line Details Remove Lines	120	Eab	Max		Mau	lun	71	Aug	For		
Type Category	2411							Muy	Jep		
L Labor Employee		10	20	20	20	20	20				
Add Lines: 1 Add											
Month Total		10	20	20	20	20	20				
Quarter Total			30			60			20		
				1						1	
	**all nu	mbers in	the table	are in 10	00's						
Notes											
Notes to be added on save:						a					
1											
						-					
					7	×					

3. In the BUDGET INFORMATION section, specify **PROJECT** in the THIS BUDGET IS FOR radio button. The auto-complete list becomes enabled.

This Budget is for:		
C Organization Unit:	$\vdots \equiv$	View
C Program:	\vdots	View
• Project:	Ξ	View

- 4. Select the desired Project from the auto-complete.
- 5. Click SAVE.

Linking a Budget from the Project Information Window

To link a Budget from the PROJECT INFORMATION window:

- 1. In the Kintana Workbench, open the Project you wish to link.
- 2. Double-click the Master Project line. The PROJECT INFORMATION window opens. Click the **Cost** tab.

Services And Antipart Project Information: Development Laptop Upgrade	×
Project Name: Development Laptop Upgrade	
Project Manager: johnsmith 🔠 Project State: Active	-
Details Cost Predecessors E Action Items E Notes Baselines E References User Data	
Project Budget	
Budget View	
	ancel
Ready	

3. Choose the desired Budget from the BUDGET auto-complete list.

Configuring Access to a Budget

Configuring access to a Budget consists of the following operations:

- Granting Access to a User
- Configuring Existing User Access

Granting Access to a User

To grant a user access to a Budget:

1. Create a new Budget or open an existing one. Click **CONFIGURE ACCESS** at the top of the page. The CONFIGURE ACCESS FOR BUDGET page opens.

C	Configure Access for Budget: Sales Integration Budget							
Co	nfigure Acces	s						
Th	The following users have access to view the Budget for Kintana 5.0. Provide additional editing access on an individual basis.							
N	View Access Additional Editing Access							
	Username	First Name	Last Name	Edit Basic Budget Information	Edit Plan and Actuals	Edit Actuals	Edit Security	
	johnsmith	John	Smith	V	2	•	V	
C	Check All Clear All Remove							
Gi	Give Access to Username: Add							
					Save	Cano	el 💦	

- 2. Select a user from the GIVE ACCESS TO USERNAME auto-complete list.
- 3. Click ADD. The user is added to the VIEW ACCESS list.
- 4. Click **SAVE**. The user has been granted View access to the Budget. To configure further Budget security options for the user, see "*Configuring Existing User Access*" on page 35.

Configuring Existing User Access

User access to a Budget can be further configured once the user has been added to the VIEW ACCESS list. The available options are listed in *Table 3-1*.

Field	Description
EDIT BASIC BUDGET INFORMATION	Allows the user to edit basic Budget information such as NAME, DESCRIPTION, STATUS, etc.
EDIT PLAN AND ACTUALS	Allows the user to edit the Budget's lines and enter new values in the Actuals fields.
EDIT ACTUALS	Allows the user to enter new values in the Actuals fields.
EDIT SECURITY	Allows the user to configure access to the Budget.

Table 3-1. Additional Editing Access for a Budget

To configure existing user access:

1. Create a new Budget or open an existing one. Click **CONFIGURE ACCESS** at the top of the page. The CONFIGURE ACCESS FOR BUDGET page opens.

Configure Access for Budget: Sales Integration Budget									
Configure Access									
The following users have access to view the Budget for Kintana 5.0. Provide additional editing access on an individual basis.									
View Access		Additional Editing Access							
Username First Name	Last Name	Edit Basic Budget Information	Edit Plan and Actuals	Edit Actuals	Edit Security				
🗖 johnsmith John	Smith		V	V	V				
Check All Clear All Remove									
Give Access to Username: 🔚 Add									
			Save	Canc	el				

- 2. Check or uncheck the desired boxes in the ADDITIONAL EDITING ACCESS section. See *Table 3-1* for descriptions of each category.
- 3. Click SAVE.

Modifying Project Budgets

Budgets can be accessed from the Kintana interface from at least two locations:

• Selecting **SEARCH -> BUDGETS** from the navigation bar, you can search for and open existing Budgets to which you have access.

Search Budget					
Search for Budget					
Please use the search criteria	below to find the Budg	et you wish to view.			
Budget Name:		Budget	Status:	•	
Created By:	<u>II</u>	Creation	n Date From:	2 To:	ଦ୍ର
Active: ALL 💌					
Start Period From:	E	To:	:=		
End Period From:		To:	:=		
Budget For: Selec	t Type 🔽		:=		
Budget Rolls Up To: Selec	t Type 💌		:=		
Budget Total greater than	and le	ss than			
Budget Actuals greater the	an and	less than]		
Budget Quarter:					
Budget Quarter Total grea	ter than	and less than			
Budget Actuals Quarter To	tal greater than	and less tha	in 🗌		
Display Results					
*Sort By: Budget Name 💌	Ascending	*Maximum F	Results Per Page:	50	
	C Descending				
			Search		
Select Budget to View			_	-	
					No Results
Budget Name	Status	Created By	Active	Budget For	
Use the search fields above to	locate the Budget you	wish to view.			
					No Results
				Prev	Next
Export Data to Excel					

• Selecting **COST MANAGEMENT -> BUDGETS -> MODIFY BUDGETS** opens a search page that can be used to locate and open existing Budgets to which you have access. You can also delete Budgets and create new Budgets directly from this page.

Modify Budget					
Search for Budget					
Please use the search criteria below t	o find the Budg	et you wish to modify.			
Budget Name:		Budget	Status:	*	
Created By:	IE	Creatio	n Date From:	🔋 To:	2
Active: ALL •					
Start Period From:	IE	To:	E		
End Period From:	iΞ	To:	12		
Budget For: Select Type	-		1		
Budget Rolls Up To: Select Type	•				
Budget Total greater than	and le	ss than			
Budget Actuals greater than	and	less than]		
Budget Quarter:	: :				
Budget Quarter Total greater tha	n	and less than			
Budget Actuals Quarter Total gre	ater than 🗌	and less tha	an 📃		
Dicolay Recults					
Sort By: Budget Name O Dev	ending scending	*Maximum	Results Per Page:	50	
	,		Conuch		
Select Budget to Modify			search	J	
Select Budget to Healty					No Reculto
Budget Name	Status	Created By	Active	Budget For	No Results
Use the search fields above to loca	te the Budget v	ou wish to modify or crea	ate a new Budget.		
		<u>or oroc</u>	budgoti		No Results
Check All Clear All Delete	Create New B	udget		Prev	Next
Export Data to Excel					

To modify an existing Budget:

1. Open the Budget and click **MODIFY BUDGET** to open the MODIFY BUDGET page.

Yiew Budget Modify Budget	Configure Acce	55	_							
Budget Information		_		Γ	Save		Cance	el 🛛		
Status: New 💌	Active: © y	res O N	0							
Name: Kintana Release 6.0										
Created On: May 6, 2003	Created By: John	Smith								
Description:										
This Budget is for:			This B	udget ro	lls up to					
C Organization Unit:	:=	¥iew	O org	- anization	Unit Bud	get:			:=	¥iew
C Program:	1	View	C Pro	gram Bud	lget:					View
Project: Kintana Releas	se 6.0	View	O Proj	ject Budg	et:					¥iew
C Unspecified			🛈 Uns	pecified						
in an and the										
Total Planned Budget: \$110,000	Budget Break	down fr	om Febr	uary 20	03 to Ju	ly 2003	-	-	_	Ē
Total Planned Budget: \$110,000 Total Actual Budget: \$0	Budget Break	down fr	om Febr	uary 20 Q2 2003	03 to Ju	ly 2003 Q	13 2003			5
Total Planned Budget: \$110,000 Total Actual Budget: \$0 Modify Line Details Remove Lines Type Category	Budget Break Q1 2003 Jan Feb	down fre Mar	om Febr Apr	uary 20 Q2 2003 May	03 to Ju Jun	iy 2003 Q Jul	1 3 2003 Aug	Sep		
Total Planned Budget: \$110,000 Total Actual Budget: \$0 Modify Line Details Type Category Labor Employee	Budget Break Q1 2003 Jan Feb	down fro Mar 20	om Febr Apr 20	uary 20 Q2 2003 May 20	03 to Ju Jun 20	ly 2003 Q Jul 20	13 2003 Aug	Sep		
Total Planned Budgets \$110,000 Total Actual Budget: \$0 Medify Lise Datalis: Measure Lises Type Category Labor Employee Add Lines: 1 Add	Budget Break Q1 2003 Jan Feb	down fr Mar 20	om Febr Apr 20	uary 20 Q2 2003 May 20	03 to Ju Jun 20	ly 2003 Q Jul 20	3 2003 Aug	Sep		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Frodity Line Datals: Tensore Lines: Type Category Labor Employee Add Lines: 1 Add Nonth Total	Budget Break	down fra Mar 20 20	Apr 20	uary 20 Q2 2003 May 20 20	03 to Ju Jun 20 20	ly 2003 Q Jul 20	1 3 2003 Aug	Sep		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Fieldfy Line Details Tenseve Lines Type Category Labor Employee Add Lines: 1 Add Nonth Total Quarter Total	Budget Break Q1 2003 Jan Feb 10 10	down fra Mar 20 20 30	Apr 20 20	uary 20 Q2 2003 May 20 20	03 to Ju Jun 20 20 60	ly 2003 Q Jul 20 20	13 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Molfy: Lene Datalis Censors Lines Type Category Lebor Employee Add Lines: 1 Add Nonth Total Quarter Total	Budget Break QI 2003 Jan Feb 10 10	down fri Mar 20 20 30	om Febr Apr 20 20	uary 20 Q2 2003 May 20 20 20	03 to Ju Jun 20 20 60	ly 2003 Q Jul 20 20	1 3 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Notify Line Details Tensore Lines Type Category Labor Employee Add Lines: 1 Add Nonth Total Quarter Total	Budget Break	Mar 20 20 30 he table	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20	03 to Ju Jun 20 20 60	ly 2003 Q Jul 20 20	13 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Frodity Line Datalis Sensore Lines Type Category Labor Employee Add Lines: 1 Add Quarter Total Quarter Total	Budget Break	Mar 20 20 30	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20	03 to Ju Jun 20 20 60	ly 2003 Q Jul 20	23 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Fodfy Line Details Immove Lines: Type Category Labor Employee Add Lines: 1 Add Quarter Total Notes Notes to be added on save:	Budget Break	down fr Mar 20 20 30 the table	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20 00's	03 to Ju Jun 20 60	ly 2003 Q Jul 20 20	23 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Fredity: Lese Details Tensore Lines: Type Category Labor Employee Add Lines: 1 Add Quarter Total Notes Notes to be added on save:	Budget Break	down fr Mar 20 20 30 the table	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20 00's	03 to Ju Jun 20 60	lý 2003 Q Jul 20 20	23 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Fedfy Like Details Researce Likes Type Category Labor Employee Add Lines: 1 Add Quarter Total Notes Notes to be added on save:	Budget Break	Mar 20 20 30	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20 00's	03 to Ju Jun 20 60	lý 2003 Q Jul 20 20	13 2003 Aug	Sep 20		
Total Planned Budget: \$10,000 Total Actual Budget: \$0 Fredity: Labor Employee Add Lines: 1 Add Quarter Total Notes Notes to be added on save:	Budget Break	Mar 20 20 30	Apr 20 20 are in 10	uary 20 Q2 2003 May 20 20 00's	03 to Ju Jun 20 60	ly 2003 Q Jul 20	Aug	Sep 20		

- 2. Make any necessary changes.
- 3. (optional) Click **CONFIGURE ACCESS** to open the CONFIGURE ACCESS FOR BUDGET page and configure security options for the Budget.
- 4. Click SAVE.

Comparing Budgets

The Budget to Budget Comparison portlet allows you to make a number of comparisons between Budgets, as well as compare a Budget's planned values to its actuals.

As with all portlets, the Budget to Budget Comparison portlet's Edit page allows you to choose parameters for the portlet's filtering and display of information. These parameters are listed in *Table 3-2*.

Field	Description
COMPARE ONE OR MORE BUDGETS	A multi-select auto-complete field that allows you to select one or more Budgets.
TO ACTUALS	Compares the selected Budget(s) to its actual values, assuming any have been entered.
To Active Child Budgets	Compares the selected Budget(s) to the Budgets that roll up into it (child Budgets).
TO ACTIVE CHILD BUDGET ACTUALS	Compares the selected Budget(s) to the actual values entered for its child Budgets.
ANOTHER SET OF BUDGETS	Compares the selected Budget(s) to another set of Budgets. This is another multi-select auto-complete list.
USE BUDGET	The Budget(s)'s planned values will be used in the comparison.
USE ACTUALS	The Budget(s)'s actual values will be used in the comparison.
TIME PERIOD COVERED BY BUDGETS	Limits the portlet's display range to the time period covered by the selected Budget(s).
SHOW FROM/TO	Allows you to select a date range to display.

Table 3-2. Budget to Budget Comparison portlet parameters

The following sections illustrate two uses for the Budget to Budget Comparison portlet.

- Comparing Planned to Actual Values
- Comparing Related Budgets

Comparing Planned to Actual Values

The Budget to Budget Comparison portlet can be used to compare a Budget's planned values to its actual values, if actual values are being captured. To see how to capture actual values for a Budget, see "*Creating a Budget*" on page 30.

You can compare a single Budget's planned and actual values, as shown in *Figure 3-1*. This is accomplished by selecting a Budget from the COMPARE ONE OR MORE BUDGETS field and the TO ACTUALS radio button on the Budget to Budget Comparison portlet's EDIT page.



Figure 3-1 Budget to Budget Comparison portlet: Single Budget planned vs. actual values

In this case, we can see that the actual values for the first month of this Budget went over its planned amounts by a fairly significant margin, while the second month stayed even, and no values have been entered for the last month.

You may also find it useful to compare a set of Budgets' planned and actual values, as shown in *Figure 3-2*. This is accomplished by selecting multiple Budgets from the COMPARE ONE OR MORE BUDGETS field and the TO ACTUALS radio button on the Budget to Budget Comparison portlet's EDIT page.



Figure 3-2 Budget to Budget Comparison portlet: Multiple Budget planned vs. actual values

In this case, we can see that user "jakesmith's" miscellaneous Projects always seem to go over budget, while "janesmith" is consistently under budget.

Comparing Related Budgets

The Budget to Budget Comparison portlet can also be used to compare sets of related Budgets, as shown in *Figure 3-3*. This is accomplished by selecting a Budget or Budgets from the COMPARE ONE OR MORE BUDGETS field and the TO ANOTHER SET OF BUDGETS radio button and multi-select auto-complete list on the Budget to Budget Comparison portlet's EDIT page.



Figure 3-3 Budget to Budget Comparison portlet: Comparing related Budgets

What we have here is a portlet comparing the Budget for an entire IT Organization Unit with three Project Budgets owned by its members. We can see that during almost every month, the combined Budgets for these Projects exceeds the Organization Unit's, in some cases by a wide margin.



When utilizing Kintana Drive's Cost Management capability, Project costs can be tracked and entered from the PROJECT window in the Kintana Workbench. Additional Project- and cost-related visualizations are accessible from the Kintana interface.

The following sections discuss Project-based Cost Management in more detail:

- Configuring Cost in the Project Settings Window
- Entering Actual Cost Data
- Analyzing Costs in the Kintana Interface

Configuring Cost in the Project Settings Window

Selecting **SETTINGS** from the **PROJECT** menu at the top of the Kintana Workbench opens the **PROJECT** SETTINGS window.

				source	manage	ment	Time Management Basel		Baselines
Project Fields		Exception Rules	Indicat	ors	Sch	heduling	Security	Pr	oject Team
is tab configur ' Task portlet ir bject Window.	es the Project n the standard	fields that can be displayed Kintana interface. Changin <u>c</u>	in the "Plan" the field co	tab of ti nfigurati	he Project on here d	t window, ar loes not char	nd also the Project a nge the display in th	nd Task e other ta	detail pages ar Ibs of the
anning Fields-				ר ^{Acti}	/ity Fields	;			
	Workbench					Workbench			
Enabled	Only	Fields		En	abled	Only	Fields		
	Г	Department			▼		% Complete		
		Description				Г	Actual Duration		
Г	Г	Last Update Date				Г	Actual Effort		
		Priority				Г	Actual Finish Dat	е	
-		Project/Tack #				Г	Actual Start Date		
-		Project/rask #					Confidence		
_		Resource Group				Г	Estimated Finish	Date	
		Scheduled Effort				Г	Estimated Remain	ning Dura	tion
		Task Category				Г	Estimated Remain	ning Effor	t
		Planned Labor				Г	Actual Labor		
		Planned Non-Labor			Γ	Г	Actual Non-Labo	r	
		Planned Total				Г	Actual Total		

The PROJECT SETTINGS window contains tabs controlling various aspects of a Master Project. Two tabs in particular focus on Cost Management:

- The **COST MANAGEMENT** tab lets you configure how cost data is calculated on the Project/Task level, and what level of manual entry is needed.
- The **SECURITY** tab lets you control which users can see cost data for the Project.

For more detailed information on configuring Cost Management from the Project Settings window, see:

- Cost Management Tab
- Security Tab

Cost Management Tab

The **COST MANAGEMENT** tab in the PROJECT SETTINGS window determines whether or not cost data is tracked for a Project.

Project Fields	Exception Rules	Indicators	Scheduling	Security	Proi	ect Team
MSP Synchronization	Cost Management	Resource	Management	Time Manage	ment	Baselines
nabling Cost Managemer isabling Cost Manageme Finable Cost Managem All Planned Labor Cos Automatically calcu Manually entered fo Manually entered fo	nt will allow you to view cos ent will block configuration of nent for this Project ts and Actual Labor Costs v ilated for tasks and rolled u or Tasks but automatically r or Tasks and Projects. The	t information and if other Project C will be: p to projects. olled up to Proje se values will no	I Earned Value Ana ost Settings. Budg cts. t automatically roll	lysis for this Proj et will still be ava	ect illable.	

Selecting the ENABLE COST MANAGEMENT FOR THIS PROJECT check box turns on Cost Management. You must then choose from the following options for the tracking of cost data:

- AUTOMATICALLY CALCULATED FOR TASKS AND ROLLED UP TO PROJECTS Planned and Actual Labor Costs for Tasks will be automatically calculated and rolled up to Projects. These values are not calculated until a Resource is assigned to a Task. For definitions of Planned and Actual Labor Costs and how Kintana Drive calculates them, see "*Cost Management*" on page 24.
- MANUALLY ENTERED FOR TASKS BUT AUTOMATICALLY ROLLED UP TO PROJECTS Planned and Actual Labor Costs for Tasks will be entered by the Project Manager or other user with the proper level of access. These values are rolled up to Projects automatically.
- MANUALLY ENTERED FOR TASKS AND PROJECTS Planned and Actual Labor Costs for Tasks and Projects will be entered by the Project Manager or other user with the proper level of access. These values do not roll up.

Security Tab

The **SECURITY** tab in the PROJECT SETTINGS window determines the users allowed to view cost data for a Project.

ttings for Developme	ent Laptop Upgrade					
MSP Synchronization	Cost Management	Resource	Management	Time Manager	ment	Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Proje	ect Team
his Project and its Ta All users	isks can be viewed by:					
O Participant Restric	ted - Only users assigned as	s Project Manager	s, Resources, or in	an assigned Re	source Gro	oup
est information on th All users Project Managers Project Managers Participants for on Project Team only.	e Project and Tasks can be v for this Master Project only for Master Project Developm ly the Tasks and Projects for	viewed by: ent Laptop Upgra which they are Pa	de and all of its sub rticipants.	project		

You can choose from the following options:

- ALL USERS (default)
- PROJECT MANAGERS FOR THIS MASTER PROJECT ONLY
- PROJECT MANAGERS FOR THIS MASTER PROJECT
 PROJECT NAME> AND ALL OF ITS SUBPROJECTS
- PARTICIPANTS FOR THE TASKS AND PROJECTS FOR WHICH THEY ARE PARTICIPANTS
- PROJECT TEAM ONLY

Entering Actual Cost Data

Actual Labor Cost data can be automatically calculated by Kintana Drive as a function of time spent on a Task multiplied by the Rate of the Resource assigned to that Task. The values for Tasks can be rolled up to their parent Projects.



Developer Bob has a Rate of \$20/hour. He spends 4 hours on a Task in a bugfixing Project.

The Task's Actual Labor Cost is computed as \$20/hour * 4 hours = \$80 for the Task.

The bug-fixing Project has a total of 5 Tasks identical to Bob's. The Total Actual Labor Cost for the Project comes to \$400 with no Actual Non-Labor Costs incurred.

Actual Non-Labor Costs, which represent miscellaneous costs incurred in performing work on a Task, are manually entered by the user.



Developer Bob needs to spend \$100 on RAM to upgrade his machine so he can finish his Task. This is an Actual Non-Labor Cost.

Actual Non-Labor Costs can be entered manually at any time.

For more detailed information about entering Actual Labor Costs, see the following sections:

- Actual Labor Cost Settings
- Entering Actual Labor Costs

Actual Labor Cost Settings

Depending on the **COST MANAGEMENT** tab setting in the **PROJECT SETTINGS** window, Actual Labor Costs can be entered manually for Projects or Tasks.

- AUTOMATICALLY CALCULATED FOR TASKS AND ROLLED UP TO PROJECTS Actual Labor Costs for Tasks are calculated by Kintana Drive and rolled up to parent Projects. Actual Labor Cost values for Tasks and Projects cannot be updated.
- MANUALLY ENTERED FOR TASKS BUT AUTOMATICALLY ROLLED UP TO PROJECTS Actual Labor Costs are entered manually by the user, and the values are rolled up to parent Projects. Project Actual Labor Costs cannot be updated, since they are rolled up from subordinate Tasks.
- MANUALLY ENTERED FOR TASKS AND PROJECTS Actual Labor Costs are entered manually by the user for Tasks and Projects. No roll-up takes place, which means that there can be some variance between the sum of Task Actual Labor Costs and the Project's Actual Labor Cost.



Before attempting to enter Actual Labor Cost values for a Project, check the PROJECT SETTINGS window's **COST MANAGEMENT** tab to verify the Cost Management settings.

Entering Actual Labor Costs

Actual Labor Costs can be entered from the following locations:

- Entering Cost Data in the Project Window Cost Tab
- Entering Cost Data in the Project Window Plan Tab
- Entering Cost Data in the Project or Task Information Window

Entering Cost Data in the Project Window - Cost Tab

Actual Labor Cost data can be entered in the **Cost** tab of the **PROJECT** window.



Cost Management must be turned on from the PROJECT SETTINGS window's **COST MANAGEMENT** tab in order for the **COST** tab to be enabled.

To enter Actual Labor Cost data in the **Cost** tab of the **PROJECT** window:

1. Open the desired Project in the Kintana Workbench.

🩋 Ргој	ect : l	Development Laptop Upgrade			
Pla	an	Cost EV Analysis Baselin	es		Gantt Chart: 🔉 🔍 🖾 Display Options
Seq	1	Name	State	R	2003 May Jun Jul
1		Development Laptop Upgrade	Active	johr	
2		⊡ Initial Assessment	Active	johr	
3		Determine Laptop Usage	Completed	iohr	johnsmith
4		Technology Assessment	Completed	jane	Janesmith;jakesmith;johnsmith
5		Cost Analysis	In Progress	julie	→
6		Purchase New Laptops	Pending Predec.	iohr	iphnsmith
7		🗄 Upgrade Laptops	Active	johr	
8		Image Old Machines	Pending Predec.	julie	l i i i i i i i i i i i i i i i i i i i
9		Perform Upgrade	Pending Predec.	. jane	janesmith;jake:
10		Test Stability	Pending Predec.	julie	l → juliesmiti
11		Roll-Out	Pending Predec.	. johr	l → jphnsn
12		Lessons Learned	Pending Predec.	julie	l III IIII IIII IIII IIII IIII IIII II
<u> </u> ↑ ↓	•	→ Edit Delete +AII	-AII		Refresh Schedule Project
Task		Add			OK Bave Cancel
"Save"	Succe	essful.			

2. Verify in the PROJECT SETTINGS window's **COST MANAGEMENT** tab that you can enter Actual Labor Cost values for Tasks or Projects.

The ALL PLANNED LABOR COSTS AND ACTUAL LABOR COSTS WILL BE radio button should be set to one of the last two options, depending on what level of control is desired.

Upon verifying, click **OK**. The PROJECT SETTINGS window closes, returning you to the PROJECT window.

- 3. Click the **Cost** tab.
- 4. Enter the Actual Labor Cost values in the appropriate Task or Project lines.
- 5. Click **SAVE** to save changes to the Project and continue editing it. Click **OK** to save changes to the Project and close the PROJECT window. Click **CANCEL** to close the Project without saving any changes.

Entering Cost Data in the Project Window - Plan Tab

To enter Actual Labor Cost data in the **Cost** tab of the **PROJECT** window:

1. Open the desired Project in the Kintana Workbench.

🙋 Proj	iect : I	Development Laptop Upgrade				
Pla	an	Cost EV Analysis Baselin	es		Gantt	Chart: 🔉 🔍 😰 Display Options
Seq	1	Name	State	R	2003 May Jun	Jul
1		Development Laptop Upgrade	Active	johr		
2		Initial Assessment	Active	johr		-
3		Determine Laptop Usage	Completed	johr	johnsmith	
4		Technology Assessment	Completed	jane	janesmith;jakesmith;johnsmith	
5		Cost Analysis	In Progress	julie		jµ iesmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec	johr	4	johnsmith
7		Upgrade Laptops	Active	johr		
8		Image Old Machines	Pending Predec	iulie		Juliesmith;josesmith;jake
9		Perform Upgrade	Pending Predec	jane		janesmith;jakes
10		Test Stability	Pending Predec	julie		Ģ <mark>uliesmith</mark>
11		Roll-Out	Pending Predec	johr		<mark>⊫ j</mark> phnsm
12		Lessons Learned	Pending Predec	julie		輝 julie
<u> </u> ↓ ↓	-	⇒ Edit Delete +AI		رىن		Refresh Schedule Project
Task		, Add				OK Save Cancel
"Save"	Succ	essful.				,

2. Open the PROJECT SETTINGS window.

MSP Synchronization Project Fields		Cost Management	Resou	rce Manage	ment	Time Managen	nent Baselines
		Exception Rules	Indicators	Scheduling		Security	Project Team
nis tab config y Task portlet roject Windov	ures the Project in the standard /.	fields that can be displayed i Kintana interface. Changing	in the "Plan" tab the field configu	of the Project uration here d	t window, ar oes not char	id also the Project a ige the display in the	nd Task detail pages an e other tabs of the
lanning Fields			′ا ['	Activity Fields			
E	Workbench			England	Workbench	Fields	
Enabled	Uniy	Fields	·	Enabled	Only	rielas	
		Department		M		% Complete	
		Description				Actual Duration	
	Г	Last Update Date				Actual Effort	
Г	Г	Priority			Г	Actual Finish Dat	e
Г	Г	Project/Task #				Actual Start Date	
_	_	December Comm				Confidence	
_		Resource Group				Estimated Finish I	Date
		Scheduled Effort			Г	Estimated Remain	ing Duration
		Task Category			Г	Estimated Remain	ing Effort
				Г	Г		
Г	Г			Г			
Г	Г			Г	Г		
						01/	tooly Conned

- 3. In the **PROJECT FIELDS** tab, enable the desired fields (ACTUAL LABOR, ACTUAL NON-LABOR, PLANNED LABOR, PLANNED NON-LABOR).
- 4. Verify in the **COST MANAGEMENT** tab that you can enter Actual Labor Cost values for Tasks or Projects.

The ALL PLANNED LABOR COSTS AND ACTUAL LABOR COSTS WILL BE radio button should be set to one of the last two options, depending on what level of control is desired.

Upon verifying, click **OK**. The PROJECT SETTINGS window closes, returning you to the PROJECT window.

- 5. Click the **PLAN** tab.
- 6. Enter the Actual Labor Cost values in the appropriate Task or Project lines.
- 7. Click **SAVE** to save changes to the Project and continue editing it. Click **OK** to save changes to the Project and close the PROJECT window. Click **CANCEL** to close the Project without saving any changes.

Entering Cost Data in the Project or Task Information Window

To enter Actual Labor Cost data in the **Cost** tab of the **PROJECT** or **TASK INFORMATION** window:

🙋 Ргој	ject : C	Development Laptop Upgrade						
Pl	an	Cost EV Analysis Baseline	:6				Gantt Cha	art: 🔉 🔍 🔛 Display Options
Seq	1	Name	State	R	2003 May	Jun		Jul
1		Development Laptop Upgrade	Active	johr	-			
2		Initial Assessment	Active	johr				
3		Determine Laptop Usage	Completed	johr		 jphnsmith		
4		Technology Assessment	Completed	jane		→ janesmith;jakesmith;johnsmith		
5		Cost Analysis	In Progress	julie				iesmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec	johr			-	johnsmith
7		Upgrade Laptops	Active	johr			1	· S
8		Image Old Machines	Pending Predec	julie				Illiesmith;josesmith;jake
9		Perform Upgrade	Pending Predec	jane				Janesmith;jakes
10		Test Stability	Pending Predec	julie				uliesmith γ
11		Roll-Out	Pending Predec	johr				<mark>i phnsm</mark>
12		Lessons Learned	Pending Predec	julie				🖙 🖶 julie
	 		- AII					Refresh Schedule Project
Task	4							
Trask	0							Cancer

1. Open the desired Project in the Kintana Workbench.

2. Verify in the PROJECT SETTINGS window's **COST MANAGEMENT** tab that you can enter Actual Labor Cost values for Tasks or Projects.

The ALL PLANNED LABOR COSTS AND ACTUAL LABOR COSTS WILL BE radio button should be set to one of the last two options, depending on what level of control is desired.

Upon verifying, click **OK**. The PROJECT SETTINGS window closes, returning you to the PROJECT window.

3. Double-click the Project or Task you wish to update. The PROJECT OR TASK INFORMATION window opens.

San Task Information:	Purchase New L	_aptops			×		
Task Name: [Pt	Irchase New Lap	tops					
Task Category:	· · · ·	Tasi	k State: [Pending Pre	decessor	<u> </u>		
E Action Items	🖻 Notes	⊟ Notifications	Baselines	E References	User Data		
Details	Resources	Cost	Exceptions	Prede	ecessors		
Task # : 30281		Department:	V	Template:			
Project Path: Devel	opment Laptop U	pgrade		_			
Resource: johns	mith 🖽	Resource Group:		Ð			
Description:				Priority:			
% Complete: 0		Confidence:	7]			
Milestones							
Mark task as mi	lestone						
Milestone autom	natically completes						
Start Date			Finish Date				
So	heduled: June 18	, 2003 🔟	Scheduled: June 24, 2003 🔟				
			Estimated:				
	Actual:		Actual:				
Duration (days)			Effort (hours)				
Sc	heduled: 5.0		Sc	heduled: 40.0			
Est. R	emaining:		Est. R	emaining:			
	Actual:			Actual:			
-Scheduling Constrain	ts						
Constr	aint Type: No Cor	istraints 💌	Constra	int Date:	1		
				OK Appl	y Cancel		
Ready							

- 4. Click the **Cost** tab. Enter the Actual Labor Cost values in the appropriate Task or Project lines.
- 5. Click **APPLY** to save changes to the Project or Task and continue editing it. Click **OK** to save changes to the Project or Task and close the PROJECT or TASK INFORMATION window.
- 6. Click **SAVE** to save changes to the Project and continue editing it. Click **OK** to save changes to the Project and close the PROJECT window. Click **CANCEL** to close the Project without saving any changes.

Analyzing Costs in the Kintana Interface

The Kintana interface provides convenient and powerful tools for visualizing your Project Cost data. Using specialized Kintana pages and portlets, you can:

- Display Projects being managed by a particular user, arranged according to the size of their Budget. The Projects' Cost health, and CPI/SPI performance are also indicated.
- Display Projects in a particular Department, arranged according to their Baseline cost. The Projects' Cost health, and CPI/SPI performance are also indicated.
- Display Projects being managed by a particular user, arranged according to their projected Actual Cost at completion. The Projects' Cost health, and CPI/SPI performance are also indicated.
- Display a chart for a single Project graphing any of the following values over a configurable period of time:
 - o Planned Value
 - o Earned Value
 - o Actual Costs
 - o Budget
 - o Budget Actuals

For more information on analyzing Project Costs in the Kintana interface, see "Analyzing Project Costs" on page 208.

Chapter 5 Setting Up Your Resources

Resources in Kintana can be tracked to optimize their time and capabilities with Kintana Drive's Resource Management functionality. Using Resource Management, a Project Manager can:

- Configure a Global Calendar and set the number of hours in a working day
- Assign a Primary Skill and Cost Rate to a Resource
- Map Resources into an Organization Model and tie Organization Units to Security Groups
- Track the future supply of Resources using Resource Pools
- Project the allocation of Resources over time using Staffing Profiles
- Assign Resources to Work Items
- View Resource load by time period, Project, or individual
- Compare Project assignments to Staffing profiles

For more detailed information on setting up and using Resource Management in Kintana Drive, see "*Managing Resources in Kintana*".

Chapter 6 Setting Up a Project

Kintana Drive allows organizations to define business initiatives as a hierarchical structure of Tasks and Subprojects that logically groups and organizes activities and deliverables. Using Kintana Projects, users can define, browse, edit, and manage complex business initiatives. The following sections provide a comprehensive set of instructions related to setting up a Project:

- Creating a Project
- Setting Up a Master Project
- Adding Tasks to a Project
- Setting Up Project Dependencies
- Creating a Master Project Schedule
- Establishing a Project Baseline



Many Project activities are performed in the Kintana Workbench interface. If you have installed a pop-up blocker in your web browser, the Kintana Workbench will not open.

Creating a Project

Kintana Drive Master Projects handle, link, and reference all of the variables vital to planning a successful endeavor. Master Projects consist of different subsets of information -- Tasks, Subprojects, Action Items, Cost data, Notes, Packages, Requests, and References -- that can be linked to each other. In addition, the Master Project maintains global settings and configurations that are tracked throughout an initiative's life cycle.

There are three main stages in the creation of a Project:

- Stage One: Setting up a Master Project
- Stage Two: Adding Tasks to a Project
- Stage Three: Creating a Master Project Schedule

Stage One: Setting Up a Master Project:

The Master Project is the overarching entity that keeps track of a particular initiative. The Master Project can be configured to display useful data about a Project as it moves toward completion. Project Templates can also be used to define an entire Master Project, and can be subsequently modified.

- Selecting Information to Track and Display: The Master Project contains configurable fields that collect information which will be tracked as the Project progresses. These fields, which include % Complete and Confidence, provide a constant point of reference for Project Managers and Participants throughout an initiative's life cycle.
- Setting Up Exception Behavior: During the course of a Project's life, some things may go wrong -- resources may be missing, Tasks may be completed late or not at all, the Project may go over budget, etc. The Master Project contains Exception Rules that can be configured to deliver advance warning of these circumstances or to signal when they have occurred.



A particular Task currently has no Resource assigned to it, and it is scheduled to begin in two days. The Master Project can flag this Exception for review.

- *Setting Up Indicators*: The Master Project also features configurable Project Plan Indicators. Indicators can display exceptions that have occurred, Projects with Custom Fields, Tasks or Projects that might require rescheduling, Tasks with defined Notifications, and any scheduling constraints that apply to a Task.
- *Setting Scheduling Options*: The Master Project can be set to schedule Projects based on different configurations for resource availability and actual start and finish dates.



Andrew, Jered, and Dave are the assigned Resources for a Project, but Jered is going on vacation for a week, and all three people need to be present for the initiative to move forward. The Project can be set not to include Jered's vacation time as viable for scheduling.

• *Setting Security Restrictions*: Project Managers can set Security Restrictions on a Project so that only those directly involved in a Project can view its information.

Stage Two: Adding Tasks to a Project:

Projects consist largely of Tasks and Subprojects. Tasks and groups of Tasks (using Templates) can be added freely to any Project Plan. Below are some common procedures used to add and modify Tasks:

- Adding Tasks to the Project Plan Panel
- Adding Tasks Using Project Templates
- Setting Up Project Hierarchy
- Attaching Additional Information to a Project or Task

Stage Three: Creating a Master Project Schedule:

Once the tasks have been added and the scheduling options have been set, the Project can be scheduled. Kintana Drive will calculate scheduled start and finish dates automatically, and inform the user of any errors it encounters in the process.

Setting Up a Master Project

The Master Project is the entity in Drive that keeps track of a business initiative. It can be configured to display useful data about a given Project as it moves toward completion.



When a user creates or edits a Project or Subproject, that user is the only one able to save changes. All other users will be warned of this before attempting to edit that Project or Subproject at the same time.

In the case of two users wishing to edit two different Subprojects under one Master Project, opening and editing only the desired Subprojects from the Project Workbench will enable each user to save changes without interfering with each other.

Two users can even edit separate Tasks in the same Project without risk.

Pla		1 / / /				
	an	Cost EV Analysis Baselin	es			Gantt Chart: 9 9 8 Display Optio
Seq	1	Name	State	R	3 May Jun	Jul
1		Development Laptop Upgrade	Active	johr		
2		⊟ Initial Assessment	Active	iohr		
3		Determine Laptop Usage	Completed	iohr	johnsmith	
4		Technology Assessment	Completed	jane	janesmith;jakesmith;johnsmith	
5		Cost Analysis	In Progress	julie	*	ju iesmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec.	. johr		l ∍ jρhnsmith
7		⊟Upgrade Laptops	Active	johr		
8		Image Old Machines	Pending Predec.	. julie		→ juliesmith;josesmith;
9		Perform Upgrade	Pending Predec.	. jane		🦌 🖌 janesmith:ja
10		Test Stability	Pending Predec.	. julie		l ⊫ j uliesr
11		Roll-Out	Pending Predec.	. johr		→ jphr
12		Lessons Learned	Pending Predec.	. iulie		Ģ <u>∎</u> ,
	•			Þ		

Figure 6-1 Kintana Drive Master Project

The Master Project can be configured in the following ways:

- Selecting Information to Track and Display
- Setting Up Exception Behavior
- Setting Up Indicators
- Setting Scheduling Options
- Setting Security Restrictions
- Setting Up the Project Team
- Setting Up Microsoft Project Integration
- Importing Custom Fields from a Project Template
Selecting Information to Track and Display

The Master Project allows Project Managers to choose information they would like to track over the course of the Project. Fields selected in this window become enabled for all Project Participants.

To select information to track and display:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **PROJECT FIELDS** tab.

MSP Synch	ronization	Cost Management	Reso	ource Manage	ment	Time Manageme	ent Baselines
Project Fie	elds	Exception Rules	Indicato	rs Sch	neduling	Security	Project Team
his tab configu ly Task portlet i roject Window	res the Project in the standard	fields that can be displayed I Kintana interface. Changing	in the "Plan" ta the field conf	ab of the Project iguration here d	: window, an oes not chan	d also the Project and ge the display in the c	Task detail pages ar ther tabs of the
Planning Fields	and and the second second			Activity Fields			
Enabled	Only	Fields		Enabled	Only	Fields	
	Г	Department				% Complete	
	Г	Description				Actual Duration	
	Г	Last Update Date				Actual Effort	
	Г	Priority				Actual Finish Date	
	Г	Project/Task #				Actual Start Date	
	Г	Resource Group				Confidence	
	Г	Scheduled Effort				Estimated Finish Da	te
	Г	Task Category				Estimated Remainin	g Duration
	Г	Planned Labor				Estimated Remainin	g Ettort
	Г	Planned Non-Labor				Actual Non-Labor	
	Γ	Planned Total			, 	Actual Total	

Figure 6-2 Settings Window - Project Fields Tab

- 3. For each field, select the appropriate check box, depending on whether you wish the field to be displayed in both the Workbench and Kintana interface, or only in the Workbench. If you do not want the field displayed in either location, do not select a check box for that field.
- 4. To apply changes to the Project and continue to set desired information without closing the window, click **AppLy**.

5. To apply changes to the Project and close the window, click OK.

Setting Up Exception Behavior

The Master Project comes with a set of predefined Exception Rules. A Project Manager can specify which Exception Rule(s) are to be enabled, as well as the criteria needed to trigger them. A Project Manager can also configure the Summary Condition, which is a simple color-coded indicator of the health of a Project. The Summary Condition watches for Exceptions that have been triggered, and changes color according to rules that can be set by the Manager. The health of the Project in terms of its cost can also be represented with the configurable Cost Health Indicator.



For a Project with a very low margin for error, you can set the percentage of triggered Exceptions needed to change the Summary Condition red to 20, giving clear early warning of problems.

A Project whose cost needs watching can be configured such that its Cost Health Indicator takes into account violations of the planned budget.

MSP	Synchronization	Cost Management	Resource M	1anagement	Time Manager	nent Baseline
Proj	ect Fields	Exception Rules	Indicators	Scheduling	Security	Project Team
Project S 60 30	ummary %of Tasks must have %of Tasks must have	Exceptions to turn the Projec	t Summary Condition	n <mark>-</mark>	· · · · · ·	
Exceptior inabled	n Rules Name	Rule			Incl	ude In Summary ndition
	Unassigned Tasks	No Resource is assi within <mark>3</mark> days	gned, and the Sche	eduled Start Date occ	urs 🔽	
V	Late Tasks	Task is not yet "Com days past the Scheo	plete", and the curi Juled Finish Date	rent date is 3	v	
	Tasks Starting Late	Task is not yet "In Pr days past the Scheo	ogress", and the c Juled Start Date	urrent date is 3	V	
	Late Estimated Finish	Estimated Finish Date Scheduled Finish Da	e is more than 4 te	days past the	Г	
	Not Enough Time Left	Estimated Remaining	Duration exceeds	the time left betweer	the 🔽	•
					ОК	Apply Cance

Figure 6-3 Settings Window - Exception Rules Tab

By default, Unassigned Tasks, Late Tasks and Tasks Starting Late are enabled and included in the Project Summary Condition. The following topics are related to setting up Exceptions:

- Setting Exception Rule Behavior
- Summary Condition
- Cost Health Indicator

Setting Exception Rule Behavior

The Master Project is equipped with the following Exception Rules:

Exception Rule	Description
UNASSIGNED TASKS	Task has no Resource assigned and Scheduled Start Date occurs in X days, where X is a user-configurable number.
LATE TASKS	Task is not yet "Complete," and the Current Day is X days past the Scheduled Finish Date.
TASKS STARTING LATE	Task is not yet "In Progress," and the current date is X days past the Scheduled Start Date.
LATE ESTIMATED FINISH	Estimated Finish Date is more than X days past the Scheduled Finish Date.
NOT ENOUGH TIME LEFT	Estimated Remaining Duration exceeds the time left between the current date and the Scheduled Finish Date by X days.
PREDECESSOR HAS EXCEPTION	Task directly preceding a milestone has triggered one of the above Exceptions.
CRITICAL PATH RUNNING LATE	Task preceding a milestone on the Project critical path has triggered one of the above Exceptions.

The following parameters for all Exception Rules are configurable:

- ENABLED Project Managers can decide whether or not the particular Exception Rule is enabled.
- RULE (NUMBER OF DAYS) Specifies the number of days the particular Exception Rule waits for or monitors. The default number of days for each Exception Rule to be triggered is three.
- INCLUDE IN SUMMARY CONDITION Decides whether or not the violations of the particular Exception Rule are included in Drive's Summary Condition (see *"Summary Condition"* on page 65).

Each Exception Rule within the **Exception Rules** tab can be configured independently.

To set Exception Rule behavior:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **Exception Rules** tab.

FExceptio	n Rules		
Enabled	Name	Rule	Include In Summary Condition
V	Unassigned Tasks	No Resource is assigned, and the Scheduled Start Date occurs within 3 days	
	Late Tasks	Task is not yet "Complete", and the current date is 3 days past the Scheduled Finish Date	
	Tasks Starting Late	Task is not yet "In Progress", and the current date is 3 days past the Scheduled Start Date	M
	Late Estimated Finish	Estimated Finish Date is more than 4 days past the Scheduled Finish Date	
	Not Enough Time Left	Estimated Remaining Duration exceeds the time left between the current date and Scheduled Finish Date by 5 days	
	Predecessor Has Exception	At least one predecessor currently has an exception	
	Critical Path Running Late	Critical path to this milestone is running late	

- 3. To enable a particular Exception Rule, select the check box to its left in the ENABLED column.
- 4. To set the number of days that trigger a particular Exception Rule, enter the desired number into the text field inside that Rule.
- 5. To include a particular Exception Rule in a Project's Summary Condition View, select the check box to its right in the INCLUDE IN SUMMARY CONDITION column.
- 6. To apply changes to the Project and continue to set Exception Rule behavior without closing the window, click **AppLy**.
- 7. To apply changes to the Project and close the window, click **OK**.



Some Exception Rules require that certain fields in the **PROJECT FIELDS** tab be enabled in order to trigger. For example, the NOT ENOUGH TIME LEFT rule requires ESTIMATED REMAINING DURATION to be enabled. See *"Selecting Information to Track and Display"* on page 61 for more information on enabling fields in the Project Fields tab.

Summary Condition

The Summary Condition is a graphical indicator of the health of a Project, located next to the Project name. A Project's Summary Condition color begins green and changes to yellow or red depending on the percentage of Tasks within a Project that have triggered Exceptions. This percentage is configurable in this tab, by any Project Manager. A Project's Summary Condition will not be calculated until the Project is saved.

Green	0%
Yellow	30%
Red	60%

Table 6-1. Default Values for Triggering Color Change in Summary Condition



A Project Manager sets the threshold value for yellow to 30%. Four Tasks trigger an exception in a Project consisting of ten Tasks total. The Summary Condition View indicator turns yellow, and will remain yellow until at least two Tasks are reworked until they no longer trigger Exceptions (this could be accomplished by changing a start date, or modifying resources). Once this occurs, the Summary Condition indicator turns green.

To set the values for triggering color changes in the Summary Condition:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the Exception Rules tab.



- 3. Enter the desired triggering value into each text field. Do not include the percent sign (%).
- 4. To apply changes to the Project and continue to set Exceptions without closing the window, click **APPLY**.
- 5. To apply changes to the Project and close the window, click **OK**.

Cost Health Indicator

The Cost Summary is part of Cost Management, and can be enabled or disabled on a per-Project basis. It appears on the PROJECT window's **Cost** tab, and as an Indicator on the Project **PLAN** tab if enabled in the SETTINGS window's **INDICATORS** tab.. It is used to indicate the health of a Project in terms of its cost. Project cost health is calculated in the following areas:

- Cost Performance Index (CPI): The cost efficiency ratio of the Project's Earned Value (Baseline Costs * % Complete) to Actual Costs. Calculated as Earned Value / Actual Cost. CPI for a healthy Project should be greater than 1.
- Schedule Performance Index (SPI): The difference in value between the scheduled completion of a Task/Project and its actual completion. Calculated as Earned Value Planned Value. SPI for a healthy Project should be greater than 1.
- Prorated Budget: A measure of the budget scheduled to have been spent to date.

Any one of these factors can be enabled or disabled when calculating Project cost health.

Color	CPI	SPI	Actual Costs > Prorated Budget By
Green	> 1	> 1	< 5%
Yellow	< 1	< 1	> 5%
Red	< 0.7	< 0.7	> 10%

Table 6-2. Default Values for Triggering Color Change in Cost Health Indicator



A Project Manager doesn't care about CPI or SPI, but wants to know when his Project exceeds its prorated budget by 2%. Exceeding the budget by 5% is the upper limit of tolerance.

He un-checks the boxes INCLUDE CPI VIOLATION IN THE COST INDICATOR and INCLUDE SPI VIOLATION IN THE COST INDICATOR.

He configures the Indicator to turn yellow if Actual Costs Exceed Prorated Budget by 2%, and red if Actual Costs Exceed Prorated Budget by 5%.

Setting Up Indicators

Kintana Drive provides Project Plan Indicators to give users a better at-aglance overview of their Projects in progress. The following Indicators can be configured to be displayed at the Master Project level. Indicators appear in the Project Plan Panel to the left of Subproject and Task names, where appropriate.

- CONSTRAINT: Displays for Tasks with scheduling constraints.
- CUSTOM FIELDS: Displays for Projects that have Custom Fields defined.
- EXCEPTION: Displays for Tasks that have triggered exceptions, and also displays the Summary Condition for Projects.
- NOTIFICATION: Displays for Tasks that have Notifications defined.
- SCHEDULING: Displays for updated Tasks or Projects that might require rescheduling.
- COST HEALTH: Displays for Projects that have Cost Management enabled.

To set Indicators to be displayed:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the INDICATORS tab.

MSP Sy	nchronization	T	Cost Management	Resource	Management	Time Manager	nent Baselines
Projec	t Fields	Ė	xception Rules	Indicators	Scheduling	Security	Project Team
Displayed	Indicator	lcon	Description			· · ·	
	Constraint	12	Shows tasks with Sch	eduling Constraints o	lefined.		
	Custom Fields	Ð	Shows Projects with a	lefined Custom Fields			
◄	Exception	1	For Tasks shows any	that have triggered a	n exception or		
			For Projects shows Su	ummary Condition			
	Notification		Shows tasks with defi	ined Notifications.			
	Scheduling	1	Shows updated Tasks	or Projects that migh	t need rescheduling.		
	Cost Health		Shows Cost Health ba	sed on Cost Summar	y Condition settings.		
						OK	Apply Cance

- 3. To display a particular Indicator, select the check box to its left in the DISPLAYED column. The Exception Indicator is displayed by default.
- 4. To apply changes to the Project and continue to set Exceptions without closing the window, click **APPLY**.
- 5. To apply changes to the Project and close the window, click **OK**.

Setting Scheduling Options

Project Managers can set different scheduling options, depending on the Project's level of resource dependency. Drive's Scheduling Options also allow for the creation of schedules based on actual start and finish dates. The default configuration is set to not use actual dates. Project Managers can perform the following scheduling actions:

- Setting a Default Date From Which to Schedule
- Setting Scheduling With or Without Actual Start/Finish Dates
- Setting Scheduling Options for Resource Dependency
- Setting the Work Day Hours

Setting a Default Date From Which to Schedule

Project Managers can set a default date for Drive to start scheduling from. This is useful for setting a hard date from which to begin an initiative, no matter what occurs during the planning process.

To set a default date from which to schedule the Project:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **SCHEDULING** tab.

Settings for Developme	nt Laptop Upgrade					
MSP Synchronization	Cost Management	Resource	Management	Time Manager	nent	Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Pro	ject Team
Choose Scheduling Mode:						
Standard - default mod	le using Scheduled Duration, Pr	edecessors, Calend	lars as well as Actual S	Start and Actual Fir	nish dates	when availab
O Progressive - optional	mode that only uses Scheduled	Duration, Predeces	sors, and Calendars			
Default Date from whic	h to Schedule:		1			
Only Includes Days in Sche	dule When:					
All of the Resources A	re Available					
C Half of the Resources	Are Available					
C At Least One Resourc	e Is Available					
C Always (Ignore Resou	rce Availability)					
				OK	Apply	Cancel
adv						

- 3. Select the **Progressive** scheduling option.
- 4. Select the desired date from the DEFAULT DATE FROM WHICH TO SCHEDULE calendar.
- 5. To apply changes to the Project and continue to set Scheduling Options without closing the window, click **APPLY**.
- 6. To apply changes to the Project and close the window, click **OK**.

Setting Scheduling With or Without Actual Start/Finish Dates

A Project Manager can choose to determine a Project's schedule using actual start/finish dates. This is the default scheduling mode.



Once a Project becomes Active, its Tasks can be marked IN PROGRESS. When Tasks are marked IN PROGRESS, actual start dates are specified for that Task. If the Master Project is set to use actual start/finish dates in scheduling, it will use these dates to determine the schedule.

To determine whether scheduling is based on actual dates or not:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **SCHEDULING** tab.

Settings for Developmen	t Laptop Upgrade				
MSP Synchronization	Cost Management	Resource	Management	Time Managen	nent 🛛 Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Project Team
Choose Scheduling Mode:					
Standard - default mode	using Scheduled Duration, Pr	edecessors, Calenc	lars as well as Actual S	Start and Actual Fin	ish dates when availab
C Progressive - optional mo	ode that only uses Scheduled	Duration, Predeces	sors, and Calendars		
Default Date from which	to Schedule:	Ē	1		
Only Includes Days in Schedi	ule vvhen:				
 All of the Resources Are 	Available				
C Half of the Resources A	re Available				
C At Least One Resource I	is Available				
C Always (Ignore Resourc	e Availability)				
				ОК	Apply Cancel
ady					

- 3. Set one of the two scheduling date options:
 - To schedule your Project using actual start/finish dates, select **STANDARD**. This is the default setting.

- To schedule your Project without using actual start/finish dates, select **PROGRESSIVE**.
- 4. To apply changes to the Project and continue to set Scheduling Options without closing the window, click **AppLy**.
- 5. To apply changes to the Project and close the window, click **OK**.

Setting Scheduling Options for Resource Dependency

Every business initiative has some minimum resource requirements, usually in the form of available personnel. The Master Project can be set to consider resource requirements when creating its schedule. For instance, it is possible to set the Master Project to ignore resource availability and schedule accordingly. The default configuration is set to require all resources to be available on any given day. When creating the Master Project's schedule, Drive will only consider days when all resources are present.

To set the minimum resource requirements for the Master Project schedule:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **SCHEDULING** tab.

Settings for Developme	nt Laptop Upgrade					
MSP Synchronization	Cost Management	Resource	Management	Time Manage	ment	Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Proj	iect Team
Choose Scheduling Mode: Standard - default mod Progressive - optional i	e using Scheduled Duration, Pro node that only uses Scheduled	edecessors, Calend Duration, Predeces	ars as well as Actual s sors, and Calendars	Start and Actual Fi	nish dates v	when availab
Default Date from whic	h to Schedule:		1			
 All of the Resources A Half of the Resources 	re Available Are Available					
C At Least One Resource	e Is Available					
C Always (Ignore Resou	rce Availability)					
				OK	Anniv	 Cance
					and should	

3. To specify the minimum resource requirement necessary for a day to be considered available, select the condition desired.



Only one condition can be selected at a time.

- 4. To apply changes to the Project and continue to set Scheduling Options without closing the window, click **APPLY**.
- 5. To apply changes to the Project and close the window, click **OK**.

Setting the Work Day Hours

Not all companies have the same length of working day. Kintana Drive allows you to set the number of hours in a working day for scheduling purposes.



This is a system-wide configuration and should not be adjusted by unauthorized users.

To set the number of hours in a working day:

- 1. Open the Kintana Workbench and click the **DRIVE** screen group.
- 2. Click the CALENDARS screen. The CALENDAR WORKBENCH window opens.

2 Cale	endar Workbend	h					
Query	Query: Username:	None					
sults	First Name:		Last Name:				
Re	Master Project:	E	Security Group:				
						-	
	Base Calenda	r	Max Row:	\$ 200	Save Query	Clear	List
	Ready						

3. Click **BASE CALENDAR**. The BASE CALENDAR window opens.

	_		June 2003		•	Current Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	2	3	4	5	6	7
1	9	10	11	12	13	14
5	16	17	18	19	20	21
2	23	24	25	26	27	28
9	30					
Set selected d	ay(s) to				I	
0	Working day		C Nonworking	day	•	Use default
Reason:						v
Description:						
Legend						
Work	ing day			Nonworking a	Jay	
Pottingo	1					Save Cancel

4. Click **Settings**. The Base Calendar Settings window opens.

Base Calendar Settings		×
Please enter the number of hours in you This value should include only working such as lunch. Working hours in a day: 8.0	ur company's working day. time and exclude breaks	_
Desdu	OK Cancel	

- 5. Enter the number of WORKING HOURS IN A DAY and click **OK**.
- 6. Click **OK** to save the change and close the BASE CALENDAR window.

Setting Security Restrictions

Project Managers can set security restrictions on a Master Project such that only those who are involved in the Project can view it. Someone who is not a Manager or Participant in a Project will not be able to open or edit it. Additionally, the Project will not appear in any searches run by a non-Participant or non-Manager, both from the Project Workbench and Project Search page. Kintana Drive defines Project Participants as users who are involved in Projects, but lack the administrative responsibilities of a Project Manager. For more information on Project Participants, see "*Updating Tasks: Project Participant Activities*" on page 221.

Security restrictions can be set in the following areas:

- Setting Security for the Master Project
- Setting Security for Cost Data

Setting Security for the Master Project

To set security restrictions for a Master Project:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **SECURITY** tab.

war aynchronization	Cost Management	Resource N	/lanagement	Time Managem	ent Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Project Team
This Project and its Task	s can be viewed by:				
 All users 					
C Participant Restricte	d - Only users assigned as	s Project Managers	s, Resources, or in	an assigned Res	ource Group
Cost information on the F	Project and Tasks can be v	viewed by:			
 All users 					
C Project Managers for	this Master Project only				
C Project Managers for	Master Project Developme	ent Laptop Upgrad	te and all of its sub	project	
O Participants for only t	he Tasks and Projects for	which they are Pa	rticipants.		
C Project Team only.					

- 3. Select the restriction type desired from the THIS PROJECT AND ITS TASKS CAN BE VIEWED BY section.
 - To allow any Kintana user to view and search for the Project, select ALL USERS.
 - To restrict Project visibility to only those involved in the Project, select **PARTICIPANT RESTRICTED**.
- 4. To apply changes to the Project and continue to set other options in the SETTINGS window, click **APPLY**.
- 5. To apply changes to the Project and close the window, click **OK**.

Setting Security for Cost Data

To set security restrictions for a Master Project's Cost data:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **SECURITY** tab.

MSP Synchronization	Cost Management	Resource	Management	Time Managen	nent Baselines
Project Fields	Exception Rules	Indicators	Scheduling	Security	Project Team
This Project and its Task	s can be viewed by:				
All users					
O Participant Restricte	d - Only users assigned a	s Project Manager	s, Resources, or in	an assigned Res	source Group
Cost information on the I	Project and Tasks can be	viewed by:			
All users					
O Project Managers for	this Master Project only				
C Project Managers for	Master Project Developm	ient Laptop Upgra	de and all of its sub	project	
C Participants for only f	he Tasks and Projects for	r which they are Pa	articipants.		
O Project Team only.					

- 3. Select the restriction type desired from the COST INFORMATION ON THE PROJECT AND ITS TASKS can be viewed by section.
 - To allow any Kintana user to view Cost data for the Project, select ALL USERS.
 - To restrict Cost data visibility solely to Master Project and its Project Managers, select **PROJECT MANAGERS FOR THIS MASTER PROJECT ONLY**.
 - To restrict Cost data visibility to the Master Project, and its Subprojects' Project Managers, select PROJECT MANAGERS FOR MASTER PROJECT PROJECT NAME> AND ALL OF ITS SUBPROJECTS.
 - To restrict Cost data visibility to only those involved in the Project, select PARTICIPANTS FOR ONLY THE TASKS AND PROJECTS FOR WHICH THEY ARE PARTICIPANTS.
 - To restrict Cost data visibility to only those specified in the SETTINGS window's **PROJECT TEAM** tab, select **PROJECT TEAM ONLY**.
- 4. To apply changes to the Project and continue to set other options in the SETTINGS window, click **APPLY**.

5. To apply changes to the Project and close the window, click **OK**.

Setting Up the Project Team

Project Managers can specify who will be allowed to act as Resources for a Project. Resources can be users and groups of users. In the **Project TEAM** tab, the Project Manager can choose to either:

• Allow all users with the Project option enabled in their Security Groups to be Resources for a Project.

Or

• Only allow those Resources who are specified in the **PROJECT TEAM** tab to be used as Resources for a Project. These Resources are listed in the tab's Resource table.



Exception: Users with the SYSADMIN: OVERRIDE KEY FIELDS SEGMENTATION can add any users as a Resource to the Project.

To setup the Project Team for a Master Project:

- 1. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.
- 2. Click the **PROJECT TEAM** tab.

Settings for Development	Laptop Upgrade							
MSP Synchronization	Cost Management	Re	esource	Management	Time Manag	ement	Baselines	
Project Fields	Exception Rules	Indica	tors	Scheduling	Security	Pr	oject Team	
This tab configures the Resources allowed to be picked in this Project If no Resource Group is specified. Check the checkbox below if you wish the Resources to be all the users with the Project option enabled in their Security Groups. If unchecked, the selection will be the Resources specified in the table below.								
Username	First Name			Last Name		Email Addr	ess	
		Add	Ren	nove				
					OK	Apply	Cancel	

- 3. To allow all Resources with the Project option enabled in their Security Groups to be used as Resources for a Project, click the appropriate check box. Skip the steps shown below and go to Step 9 of this procedure.
- 4. To specify Resources for a Project, deselect the appropriate check box and click ADD. The RESOURCE: NEW window opens.

Resource: Ne	w		×
Resource:			
Ready	ОК	Add	Cancel

5. Click the RESOURCE auto-complete icon. A VALIDATE window opens.

Validate							×
Resource:							
Username	First Name	Last Name		Seq	Username	First Name	Last N.
				1	joesmith	Joe	Smith
				2	jaysmith	Jay	Smith
				3	johnsmith	John	Smith
			-				
			7				
•		Þ					F
Multi	Refresh C)K Cancel			1	Ŧ	
Returned 388 choices.							

- 6. Select the Resource from the list of Resources and click **OK**. The VALIDATE window closes. The name of the selected Resource appears in the required RESOURCE field of the RESOURCE: NEW window.
- 7. Click ADD to add the current Resource and continue adding more Resources.
- 8. Click **OK** to add the current Resource and close the RESOURCE: NEW window.

MSP Synchronization	Cost Management	Resource	Management	Time Manager	ment Baseline			
Project Fields	Exception Rules	Indicators	Scheduling	Security	Project Team			
This tab configures the Resources allowed to be picked in this Project if no Resource Group is specified. Theck the checkbox below if you wish the Resources to be all the users with the Project option enabled in their Security Groups. If unchecked, the selection will be the Resources specified in the table below. Allow all Resources with the Project option enabled in their Security Groups to be picked in this project								
Username	First Name		Last Name	E	mail Address			
ennysmith	Jenny	Smith		jennysmith@	@kintana.com			
osesmith	Jose	Smith						
akesmith	Jake	Smith		jakesmith@l	kintana.com			
	[Add Rer	τονε					

9. Click **OK** to save the selections and close the window. Click **SAVE** to save the selections and leave the window open.

Deleting Resources from a Project Team

To delete a specified Resource from a Project Team:

- 1. From the **PROJECT TEAM** tab, select the Resource in the tab's RESOURCE table.
- 2. Click **REMOVE**. The Resource is removed from the RESOURCE table.
- 3. Click **OK** to save the action and close the window. Click **SAVE** to save the action and leave the window open.

Setting Up Microsoft Project Integration

The Kintana Drive - Microsoft Project 2000 interface allows Project Managers to synchronize project information in a Kintana Drive Project with the project information in a Microsoft Project 2000 Project file. Information can also be imported from Microsoft Project to Kintana Drive and exported from Kintana Drive to Microsoft Project.

Kintana Drive has three different synchronization modes that a Project Manager can choose from. The various synchronization modes let the Project Manager use different strategies for importing/exporting information between Drive and Microsoft Project. See *"Control Mode"* on page 82 for more information about synchronization modes.

Before exporting or synchronization, the Project Manager must select a synchronization mode from the **MSP Synchronization** tab in the Settings window. The **MSP Synchronization** tab is shown in *Figure 6-4*.

Project Fields E	xception Rules	Indicators	Scheduling	Security	Project Team
MSP Synchronization	Cost Management	Resource	Management	Time Managem	ent Baseline:
/licrosoft® Project File Information			y History		
ocation:		Last A	ctivity: N	one	
ilename:		Kintana	a Last Update Date: Ju	in 9, 2003 11:36 AM I	PDT
Control Mode					
Kintana Drive controlled	Use Kintana Drive to p Synchronize with Micro Microsoft Project.	erform all proje soft Project for v	ct planning, schedu /isibility. For examp	ling, and tracking a le, you can run rep	activities. orts using
C Microsoft Project controlled	Use Microsoft Project t synchronized Kintana I Participants can also li synchronized project.	o perform all pr Drive project aut ink other Kintan	oject planning, sche tomatically rolls up a information (requ	eduling, and trackir into the Kintana da ests and packages	ig activities. The shboard. s) to tasks in the
C Kintana Drive controls actuals	Use Microsoft Project t Participants directly rep to collect new actuals i publish the changes b	o plan and sche port actuals usin nto Microsoft Pr ack into Kintana	edule the project. U ng Kintana Drive. P oject. After revising i Drive.	se Kintana Drive to eriodically synchro the plan, synchror) track actuals. nize the projects nize again to
esource Identification	ana username as the na	ame of resource	es created during sy	nchronization. Exa	mple: johnsmith
C Full name Use Full	Name (First Name, a sp	ace and Last N	lame) as the name	of resources creat	ed during
					1

Figure 6-4 MSP Synchronization Tab



The **MSP Synchronization** tab is available only for Projects, but not for Project Templates.

The MSP SYNCHRONIZATION tab has four sections:

- Microsoft Project File Information
- Activity History
- Control Mode
- Resource Identification



When importing information from Microsoft Project to Kintana Drive, the **MSP SYNCHRONIZATION** tab is not available because the Drive Project file has not been created yet. The Import Wizard performs the same functions as the **MSP SYNCHRONIZATION** tab sections described below.

Microsoft Project File Information

The MICROSOFT PROJECT FILE INFORMATION section displays the path and filename information of the Microsoft Project file associated with a Kintana Drive Project. The Microsoft Project file can be stored on a local machine or a local network.

Activity History

The ACTIVITY HISTORY section displays information about the last synchronization, export or import that took place for this project.

Control Mode

The CONTROL MODE section lets the Project Manager select a synchronization mode. The available options are:

• KINTANA DRIVE-CONTROLLED

The Project Manager creates a project in Drive to perform planning and tracking activities, such as scheduling tasks and tracking actuals. After exporting, the Microsoft Project file is used for reports and distribution. (This is the default value for new Projects created in Drive.)

• MICROSOFT PROJECT-CONTROLLED

The Project Manager creates a project in Microsoft Project and synchronizes it in the Kintana Workbench. For all subsequent synchronizations, information in Drive is updated with current information from Microsoft Project.

• KINTANA DRIVE CONTROLS ACTUALS

The Project Manager plans and schedules the Project in Microsoft Project while using Drive to track actuals. Each subsequent synchronization updates the Microsoft Project file with actuals data from Drive. The Drive Project is updated with changes to the project structure or schedule in Microsoft Project.

Resource Identification

The RESOURCE IDENTIFICATION section lets the Project Manager choose how missing resources created during an export or synchronization will be named in the Microsoft Project file. (This section is only enabled when the Control Mode is set to **KINTANA DRIVE-CONTROLLED**.) Select one of the following options:

• KINTANA USERNAME

The Kintana username is used as the name of the new Microsoft Project resource created during synchronization.

• FULL NAME

The Full Name is used as the name of the new Microsoft Project resource created during synchronization.

After selecting the Control Mode and Resource Identification options, click **OK** to save your selections.

Importing Custom Fields from a Project Template

Project Templates are used in Drive to create repeatable processes to be used in Projects. They can be used as a model and serve as a basis for Master Projects or Subprojects. Project Templates can also contain custom fields that can capture information not normally covered by standard Project and Task fields. These custom fields are unique to their Project Template.

Custom fields can be associated with an existing Project without importing the Project Template they come from. This allows you to capture whatever information is needed without having to simultaneously import a superfluous set of Projects or Tasks. Custom fields appear in the PROJECT or TASK INFORMATION window on their own tab.

To associate custom fields from a Project Template with your own Project:

- 1. Open the Project you wish to add custom fields to.
- 2. In the Project Plan Panel, double-click the Project name or select it and click **EDIT**. The PROJECT INFORMATION window opens.

Seles System Integration: Sales System Integr	ration			2
Project Name: Sales System Integration	n			
Project Manager: johnsmith		Project	State: Active	-
Details Cost Predecessors 🗈 Action	ltems 🛛 🖻	Notes I	Baselines 🛛 🖻 References 🗍 Us	er Data
Project #: 30629	Departr	ment:	Template:	
Project Path: Doc Project				
Description:			Priority:	
% Complete: 0	Confide	ence:	7	
Custom Fields Defined In:	Ŧ			
Start Date		Finish Dat	ie	
Scheduled: April 23, 2003	17		Scheduled: April 24, 2003	
			Estimated:	12
Actual:	17		Actual:	17
Duration (days)		Effort (ho	urs)	
Scheduled: 2.0			Scheduled: 20.0	
Est. Remaining:			Est. Remaining:	
Actual:			Actual:	
			OK Apply	Cancel
Ready				

- 3. Select the Project Template containing the desired custom fields from the CUSTOM FIELDS DEFINED IN auto-complete list.
- 4. Click **APPLY** to save changes and continue working in the PROJECT INFORMATION window. Click **OK** to save changes and close the PROJECT INFORMATION window. Click **CANCEL** to close the PROJECT INFORMATION window without saving any changes.
- 5. Click **SAVE** to save changes and continue working on the Project. Click **OK** to save changes and close the Project. Click **CANCEL** to close the Project without saving any changes. 7

Adding Tasks to a Project

Once the Master Project has been configured, you can add Tasks to the Project and specify Task details, including assigning resources or resource groups. Tasks can be added individually or in a pre-sequenced group with a Project Template. Tasks can also be organized in a hierarchical fashion quickly and easily. Some common methods for adding and manipulating tasks are described below:

- Adding Tasks to the Project Plan Panel
- Adding Tasks Using Project Templates

- Setting Up Project Hierarchy
- Attaching Additional Information to a Project or Task
- Creating a Task From a Request
- Adding Milestones

Adding Tasks to the Project Plan Panel

To add a Task to the Project Plan Panel:

1. Within the PROJECT window, click ADD TASK. A new Task appears in the Project Plan Panel below the current selection.

You can also add a new Task by selecting the last item in the Project Plan Panel and pressing Insert or the down arrow on your keyboard.

👰 Project :	Implementation Lifecycle							_ 🗆 ×
Plan	Cost EV Analysis Baselin	186		Gar	ntt Chart:	22	S Di	splay Options
Seq !	Name	State	Sc	June 2003	12	13	14	15
1	⊡Implementation Lifecycle	New						_
2	Define Project Objectives	New						
			F					Þ
<u>,</u> 	⇒ Edit Delete ♣All			1		Refresh	Sche	dule Project
					_	- tonoon		uale i loject
Task	Add					OK S	ave	Cancel
Ready								

- 2. Edit the new Task's information.
 - Tasks can be edited directly inside the Project Plan Panel. Click on a field to edit its contents.
 - Tasks can also be edited through the TASK INFORMATION window, which displays more detailed information on a Task.

Fask Category:		T	Task State: New		-
E Action Itome	E Notes	E Notifications	Bacelines	E Deferences	Liser Data
Details	Bocourcoc	Cost	Eventione	Brodo	COCCORC DURA
	Resources		Exceptions		:00000
Task #: [30649		Department:		Template:	
Project Path: Implem	entation Lifecycle	·		5	
Resource:	<u> </u>	Resource Group:		± 	
Description:		_		Priority:	
% Complete: 0		Confidence:	7		
Villestones Mark task as mile Milestone automa	stone tically completes		Finish Date		
Villestones Mark task as mile Milestone automa Start Date	stone tically completes		Finish Date		00
Milestones Mark task as mile Milestone automa Start Date Start Date	stone tically completes eduled: June 9, 2	2003	Finish Date	cheduled: June 9, 20	103 🖬
Villestones Mark task as mile Milestone autome Start Date Start Date	stone tically completes eduled: June 9, 2 Actual:	2003	Finish Date	cheduled: June 9, 20 istimated: Actual:	103
Villestones Mark task as mile Milestone automs Start Date Sch Duration (days)	stone tically completes eduled: June 9, 2 Actual:	2003	Finish Date St	cheduled: June 9, 20 istimated: Actual:	103 E
Villestones Mark task as mile Milestone autome Start Date Start Date Sch Duration (days)	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0	2003	Finish Date St	cheduled: June 9, 20 istimated: Actual: cheduled: 8.0	103 E
Villestones	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0 maining:	2003 E	Finish Date Sc Effort (hours) Eff. Rr Est. Rr	cheduled: June 9, 20 istimated: Actual: cheduled: 8.0 emaining:	103 E
Villestones Mark task as mile Milestone automa Start Date Sch Duration (days) Est. Ren	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0 naining: Actual:		Finish Date Sc Effort (hours) Sc Effort (hours) Sc	cheduled: June 9, 20 istimated: Actual: cheduled: 8.0 emaining: Actual:	103
Villestones Mark task as mile Milestone automa Start Date Scheduling Constraints	stone tically completes eduled: June 9, 2 Actual:		Finish Date Sc Effort (hours) Sc Effort (hours) Sc Est. R	cheduled: June 9, 20 istimated: Actual: Cheduled: 8.0 emaining: Actual:	103

i. Double click on the new Task. The TASK INFORMATION window opens.

- ii. Modify the information under each tab in the TASK INFORMATION window as necessary (for details, see "*Editing Task Information*" on page 121).
- 3. To apply changes to the Project without closing the window, click APPLY.
- 4. To apply changes to the Project and close the window, click OK.

You can also copy and paste Tasks using Crtl-C and Crtl-V. Multiple Tasks can be copied by holding down the Shift key and selecting with the mouse.

Adding Tasks Using Project Templates

Pre-defined bundles of Tasks can be added with the use of Project Templates. The Template will be copied into the working Project Plan Panel as a Subproject, along with its default values for Scheduled Effort, Scheduled Duration, and notifications. To add a set of tasks using a Project Template:

- 1. Within the PROJECT window, select **PROJECT CREATED FROM TEMPLATE** from the drop down list.
- 2. Click ADD. The ADD PROJECT TEMPLATE window opens.
- 3. Select a PROJECT TEMPLATE from the auto-complete list.
- 4. Click **OK**. The ADD PROJECT TEMPLATE window closes. The selected Template is added to the Project Plan as a collapsed Subproject.
- 5. Modify the information for any Task inside the Subproject by either editing it directly in the Project Plan Panel, or double-clicking on the Task and editing fields. See "*Adding Tasks to the Project Plan Panel*" on page 85 for more detailed information.



Project Templates can be modified to contain Custom Fields. See "*Creating Custom Fields for Project Templates*" on page 165 for more detailed information.

Setting Up Project Hierarchy

Kintana Drive allows users to add Tasks and Subprojects (from Templates) in any order. Once the Tasks have been added, Drive users can also arrange and group them in a hierarchy.

🙋 Proj	ject : I	Development Laptop Upgrade						
PI	an	Cost EV Analysis Baselin	es				Gantt Cha	rt: 🔍 🔍 🔛 Display Options
Seq	1	Name	State	R	2003 May	Jun		Jul
1		Development Laptop Upgrade	Active	johr			_	
2		Initial Assessment	Active	johr				
3		Determine Laptop Usage	Completed	johr		jphnsmith		
4		Technology Assessment	Completed	jane	•	janesmith;jakesmith;johnsmith		
5		Cost Analysis	In Progress	julie		>	jų i	esmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec	johr			+	johnsmith
7		-Upgrade Laptops	Active	johr			L	
8		Image Old Machines	Pending Predec	julie				Iliesmith;josesmith;jake
9		Perform Upgrade	Pending Predec	jane				janesmith;jakes
10		Test Stability	Pending Predec	julie				l ⊳ jµliesmith
11		Roll-Out	Pending Predec	johr				- johnsm
12		Lessons Learned	Pending Predec	julie				iulie →⊟ julie
	•			×	1			
<u></u>	-	Edit Delete	-AI					Refresh Schedule Project
Task		Add						OK Save Cancel
"Save"	Succ	essful.						

To move an item up in the hierarchy:

- 1. In the Project Plan Panel, select the Task or collapsed Subproject you want to move.
- 2. Click the UP ARROW button or press Ctrl-up arrow on your keyboard.

The selected Task or Subproject moves up in the list.

- If the selected item is not at the same level as the item it is switched with, it is indented or outdented to match the level of the item it is switched with.
- If the switch results in a Subproject with no immediate children, that Subproject is converted to a Task after it moves.

To move an item down in the hierarchy:

- 1. In the Project Plan Panel, select the Task or collapsed Subproject you want to move.
- 2. Click the Down Arrow button or press Ctrl-down arrow on your keyboard.

The selected Task or Subproject moves down in the list.

- If the item immediately above the selected item is an expanded Subproject, the selected item becomes its child.
- If the item immediately above the selected item is a collapsed Subproject or Task, the selected item is indented or outdented to match the Subproject or Task's level.
- If the selected item was the only child of a Subproject, that Subproject is converted to a Task after the selected item moves.

To indent an item:

- 1. In the Project Plan Panel, select the Task or collapsed Subproject you want to move.
- 2. Click the **RIGHT ARROW** button or press Ctrl-right arrow on your keyboard.

The selected Task or Subproject moves one level deeper in the hierarchy.

• If the item immediately above the selected item is a Task, that Task is converted to a Subproject.



If the selected item is the first child of a Subproject, you will not be able to indent it.

To outdent an item:

- 1. In the Project Plan Panel, select the Task or collapsed Subproject you want to move.
- 2. Click the LEFT ARROW button or press Ctrl-left arrow on your keyboard.

The selected Task or Subproject moves out one level in the hierarchy.

- If the selected item was a child of a Subproject, it becomes either a Task or Subproject on the same level as its former parent.
- If the selected item was a Subproject's only child, that Subproject is converted to a Task.
- If the selected item was a Task with other Tasks of the same level beneath it, those Tasks are converted to children of the selected item, which is now a Subproject.

Useful Keyboard Shortcuts in the Project Plan Panel

Tasks and Subprojects within the Project Plan Panel can be manipulated from the keyboard as well as the buttons in the Project Window. *Table 6-3* lists all available keyboard shortcuts.

Keystroke	Action
Insert	Inserts a Task into the hierarchy above the current row.
Delete	Deletes the selected Task from the Project.
Ctrl-Up Arrow	Moves a Task up in the hierarchy.
Ctrl-Down Arrow	Moves a Task down in the hierarchy.
Ctrl-Left Arrow	Outdents a Task in the hierarchy.
Ctrl-Right Arrow	Indents a Task in the hierarchy.
Down Arrow (on last Task in hierarchy)	Adds a new Task to the hierarchy below the last row.
Crtl-C	Copies the selected Task.
Ctrl-V	Pastes a Task or Tasks (must be on the Project's last line)
F2	Edits the selected cell in the Project Plan Panel.
ESC	Cancels changes to a cell in the Project Plan Panel.
Left or Right Arrow (while editing)	Saves edits and moves cursor to the next cell in the Project Plan Panel.

Table 6-3. Keyboard Shortcuts in the Project Plan Panel

Attaching Additional Information to a Project or Task

Tasks and Subprojects can contain other types of information, such as Kintana Create Requests, Kintana Deliver Packages, attachments, and URLs. They can also be configured to send notifications based on certain conditions.

Project Managers can create Tasks from Requests in the Kintana Workbench. The newly created Task is linked as a Reference to the originating Request. See *Creating a Task From a Request* for more information.

Refer to "Configuring Tasks" on page 113 for detailed instructions on:

- Assigning Resources
- Setting Up Notifications
- Editing Task Information

- Attaching References to Tasks
 - o Attaching Existing Requests
 - o Attaching Packages
 - o Attaching Documents
 - o Attaching URLs
- Configuring Task Predecessors
- Setting Scheduling Constraints

Creating a Task From a Request

A Task can be created from a Request and added to the Project Plan. The new Task will have a Reference to the originating Request.

To create a Task from a Request:

1. Within the PROJECT window, select **TASK CREATED FROM REQUEST** from the drop down list at the bottom left corner of the window.

👰 Project : I	mplementation Lifecycle				
Plan	Cost EV Analysis Baseline	38	G	antt Chart: 🔉 🔍	B Display Options
Seq !	Name	State Sc	June 2003	12 13	14 15
1	⊡Implementation Lifecycle	New			
2	L Define Project Objectives	New			
	Edit Delete	— All		Refresh	Schedule Project
Task Create	d From Request 💽 Add			ок	Save Cancel
Ready					

2. Click ADD. The NEW TASK FROM REQUEST window opens.

New Task From Request		
Request No.:	E	
Select the Relationship that the selected Rec	quest has to Task (New):	
C Task Updated by Request - (Auto-Upd	ating) - Task (New) is automatically updated by selected Request	
Search	OK Car	ncel
Ready		

- 3. Specify the Request(s) you want to use in the REQUEST NO auto-complete list, or click **SEARCH** to search for the Request(s). The REQUEST SELECTION window opens.
- 4. Search for the Request(s) you want to use by entering search criteria in the appropriate fields and clicking LIST.

The Requests that match your search criteria display in the QUERY RESULTS section of the window.

Select the Relation	ship that the selected Request	has to Task (New):				_
uery Results						
Request No.	Request Type	Request Status	Priority	Description	Created By	Т
0002	PFM - Project Request	New	Normal	Paper Free	admin	

5. Select the Request(s) in the QUERY RESULTS section that you want turn into Tasks.

You can select multiple Requests in the QUERY RESULTS section. When they are added to the Project Plan, a new Task is created for each selected Request.

6. Click **OK** to create the new Task and close the window. Click **ADD** to create the new Task and perform additional searches for more Requests.

7. Click **SAVE** to save the new Task and leave the PROJECT window open. Click **OK** to save the new Task and close the PROJECT 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.

You can change the Reference for this Task at any time by double-clicking it, opening the TASK INFORMATION window and editing it in the **REFERENCES** tab.

Adding Milestones

Milestones are used to mark significant events in a Project, often the completion of a deliverable or arrival of a deadline. As markers, milestones are typically set by Project Managers to complete as soon as they are reached and therefore generally do not have effort or duration, though they can be configured to possess duration. Milestones are created the same way as Tasks.

To create a Milestone:

1. Within the PROJECT window, click ADD TASK. A new Task appears in the Project Plan Panel below the current selection.

You can also add a new Task by selecting the last item in the Project Plan Panel and pressing Insert or the down arrow on your keyboard.

🙋 Project : I	mplementation Lifecycle							_ 🗆 ×
Plan	Cost EV Analysis Baselina	:6		\$	Gantt Chart:	<u> </u>	S Di	splay Options
Seq !	Name	State	Sc	June 2003	1 12	13	14	15
1	⊡Implementation Lifecycle	New						
2	Define Project Objectives	New						
4								
	→ L Edit Doloto → All I	- AU		1		Bofrach	Roho	
		All			_	Reiresh	Sche	uule Project
Task	▼ Add					ок з	ave	Cancel
Ready								

	T	Task State: New	-
Detaile Detaile	es E Notifications	Baselines E Refer	ences OperData
Resour		Exceptions	Predecessors
Task #: 30649	Department:	Template:	
Project Path: Implementation Lit	fecycle		
Resource:	Resource Group:		1
Description:		Priority:	
% Complete: 0	Confidence:	Ψ.	
Milestones			
Mark task as milestone			
Milestone automatically comple	etes		
Start Date		Finish Date	
Scheduled: Jur	ne 9, 2003 💼	Scheduled: Ju	ine 9, 2003 💼
		Estimated:	1
Actual:		Actual:	Ē
		Effort (hours)	
Duration (days)			
Duration (days) Scheduled: 1.0		Scheduled: 8.	0
Duration (days) Scheduled: 1.0 Est, Remaining:		Scheduled: 8.	0
Duration (days) Scheduled: 1.0 Est. Remeining: Actual:		Scheduled: 8. Est. Remaining:	
Duration (days) Scheduled: 1.0 Est. Remaining: Actual: Schedulino Constraints		Scheduled: 8. Est. Remaining: Actual:	0
Duration (days) Scheduled: 1.0 Est. Remaining: Actual: Scheduling Constraints		Scheduled: 8. Est. Remaining: Actual	0

2. Double click on the new Task. The TASK INFORMATION window opens.

- 3. Select the MARK TASK AS MILESTONE check box. If you want the Milestone to mark itself as Complete automatically upon being reached, select the MILESTONE AUTOMATICALLY COMPLETES check box.
- 4. Modify the information under each tab in the TASK INFORMATION window as necessary (for details, see "*Editing Task Information*" on page 121).
- 5. To apply changes to the Task without closing the window, click **APPLY**. To apply changes to the Task and close the TASK INFORMATION window, click **OK**. To close the TASK INFORMATION window without saving changes, click **CANCEL**.



A Task will be automatically converted to a Milestone if its duration is 0.

Setting Up Project Dependencies

Kintana Drive allows you to create dependencies between a Project or Task and another, completely separate Project or Task.



Manager Bob has a Training Project for a new software module being installed on his group's computers. In order for his Project to get started, the Software Upgrade Project headed by Manager Steve must be finished first. Bob can create a Finish-Start Dependency relationship between the Software Upgrade Project and his own Training Project.

These dependency relationships are controlled from the **PREDECESSORS** tab of the **PROJECT** or TASK INFORMATION window.

🌺 Project Informati	on: Development Lapt	op Upgrade			×
Project Name:	Development Laptop U	Jpgrade			
Project Manager:	johnsmith	P	roject State: Active		-
Details Cost Pr	edecessors 📄 🖻 Action	Items 🖻 🖻 Notes	Baselines 📋 Refere	nces User Data	
Туре	Project	Name	ID/Seq	Relationship	
					0man 1
Add Rem	uve				ohen
			C	K Apply	Cancel
Ready					

The types of Predecessor relationships available are described in Table 6-4.

Table 6-4. Possible Predecessor Relationships to a Project or To	ask
--	-----

Predecessor Type	Description	Possible Relationships
TASK/PROJECT	A Task or Project in the current Project	FINISH/START - The Project or Task can start once its Predecessor has completed.
External Task	A Task from a separate Project	FINISH/START - The Project or Task can start once its Predecessor has completed.

Predecessor Type	Description	Possible Relationships
EXTERNAL PROJECT	A separate Project	FINISH/START - The Project or Task can start once its Predecessor has completed.
REQUEST	A Request (possible for Tasks only)	FINISH/START - The Task can start once its Predecessor has completed.
		FINISH/FINISH - The Task and Request can start at the same time, but neither will be marked complete until both are complete.

Table 6-4. Possible Predecessor Relationships to a Project or Task

The following sections discuss setting Predecessor relationships in more detail:

- Setting Internal Predecessors
- Setting an External Predecessor Task
- Setting an External Predecessor Project
- Setting an External Predecessor Request

Setting Internal Predecessors

Setting a Project/Task Predecessor that is contained in the same Project can be done directly in the Project Plan Panel.
🩋 Ргој	🖉 Project : Development Laptop Upgrade 📃 🔲 🗙											
Pla	an	Cost E	V Analysis Baselines					Ga	antt Chart:	<u>Q</u> <u>Q</u>		Display Options
Seq	1	Predecessors	Name		Jun 09	e 200	13 10	11	12	13	14	15
1			Development Laptop Upgrade	Activ	F	F	-	_				
2				Activ	E							
6		5	Purchase New Laptops	Penc								
7		2	Upgrade Laptops	Activ								
11		10	Roll-Out	Penc								
12		11	Lessons Learned	Penc								
	•			×	-							Þ
	•	➡ Edit	Delete #AII							Refresh	Sc	hedule Project
Task			Add							ок	Save	Cancel
"Refres	h" Sı	iccessful.										

In the PREDECESSOR column, type the sequence number of the desired Predecessor Project or Task and click **SAVE** to save changes.

Setting an External Predecessor Task

To set an external Predecessor Task for a Task or Project:

1. Open the PROJECT OF TASK INFORMATION window of the Project or Task you wish to add a Predecessor to. Click the **PREDECESSORS** tab.

🌺 Project Informati	on: Development Lapt	op Upgrade			×	
Project Name:	Project Name: Development Laptop Upgrade					
Project Manager:	Project Manager: johnsmith III Project State: Active					
Details Cost Pr	Details Cost Predecessors 🖻 Action Items 🖻 Notes Baselines 🖻 References User Data					
Туре	Project	Name	ID/Seq	Relationship		
Add Rem	ove				Open	
			C	K Apply	Cancel	
Ready						

2. Click ADD. A line is added to the **PREDECESSORS** tab table.

🌺 Project Informat	tion: Development Lapto	op Upgrade			×	
Project Name:	Development Laptop U	pgrade				
Project Manager:	Project Manager: johnsmith 🔠 Project State: Active 🔽					
Details Cost P	redecessors 📄 🖻 Action	Items 🖃 Notes	Baselines 🗐 🗉 Refe	erences User Data	<u>п</u>	
Туре	Project	Name	ID/Seq	Relations	ship	
Task/Project	Development Laptop			Finish-Start		
Add Ren	nove				Open	
				OK Apply	Cancel	
Ready						

- 3. In the TYPE column, select **EXTERNAL TASK** from the drop down list.
- 4. In the PROJECT column, select the external Project from the auto-complete list.
- 5. In the NAME column, select the Task Name from the auto-complete list.

6. Click the field in the ID/SEQ column to display the Task ID.

🌺 Project Informati	ion: Development Lapt	op Upgrade			×	
Project Name:	lame: Development Laptop Upgrade					
Project Manager:	johnsmith	E P	roject State: Active		-	
Details Cost Pr	redecessors 📃 Action	Items 🖻 🖻 Notes	Baselines 🗐 🖻 Refer	ences User Data		
Туре	Project	Name	ID/Seq	Relationship		
External Task	Sales Server Upgrade	Discuss Findings	30388	Finish-Start		
<u> </u>						
Add Rem	iove			0	pen	
				OK Apply C	ancel	
Ready						

7. Click **APPLY** to save changes and continue working in the PROJECT OF TASK INFORMATION window. Click **OK** to save changes and close the PROJECT OF TASK INFORMATION window. Click **CANCEL** to close the PROJECT OF TASK INFORMATION window without saving any changes.

Setting an External Predecessor Project

To set an external Predecessor Project for a Task or Project:

1. Open the PROJECT OF TASK INFORMATION window of the Project or Task you wish to add a Predecessor to. Click the **PREDECESSORS** tab.

🌺 Project Informat	ion: Development Lapt	op Upgrade			×
Project Name:	Development Laptop	Jpgrade			
Project Manager:	johnsmith	P	roject State: Active		•
Details Cost P	redecessors 📄 🖻 Actior	Items 🗇 🗇 Notes	Baselines 🗐 🖻 Refer	ences User Data	
Туре	Project	Name	ID/Seq	Relationshi	a a a a a a a a a a a a a a a a a a a
Add Rem	1076				Open
				OK Apply	Cancel
Ready					

2. Click ADD. A line is added to the **PREDECESSORS** tab table.

Services Information: Development Laptop Upgrade							
Project Name:	Project Name: Development Laptop Upgrade						
Project Manager:	Project Manager. johnsmith 🔢 Project State: Active 💌						
Details Cost Pr	Details Cost Predecessors E Action Items E Notes Baselines E References User Data						
Туре	Project	Name	ID/Seq	Relations	ship		
Task/Project	Development Laptop			Finish-Start			
Add Rem	ove				Open		
			C	K Apply	Cancel		
Ready							

- 3. In the Type column, select **External Project** from the drop down list.
- 4. In the PROJECT column, select the external Project from the auto-complete list.

- 5. In the NAME column, select the Project or Subproject Name from the autocomplete list.
- 6. Click the field in the ID/SEQ column to display the Project or Subproject ID.

🌺 Project Informati	on: Development Lapto	op Upgrade			×
Project Name:	Development Laptop U	Jpgrade			
Project Manager:	johnsmith	P	roject State: Active		•
Details Cost Pr	edecessors Er Action	Items I (E) Notes I	Baselines I (E) Refere	ences User Data	1
Type	Project	Name	ID/Seq	Relations	hip
External Project	Sales Server Upgrade	Purchase New S	30390	Finish-Start	
Add Rem	ove				Open
<u> </u>					0
			0	Apply	Cancel
Ready					

7. Click **APPLY** to save changes and continue working in the PROJECT or TASK INFORMATION window. Click **OK** to save changes and close the PROJECT or TASK INFORMATION window. Click **CANCEL** to close the PROJECT or TASK INFORMATION window without saving any changes.

Setting an External Predecessor Request

To set an external Predecessor Request for a Task:

1. Open the TASK INFORMATION window of the Task you wish to add a Predecessor to. Click the **PREDECESSORS** tab.

😓 Task Information: Purchase New Laptops 🛛 🔀							
Task Name: Purchase New Laptops							
Task Category:	Task Category: Task State: Pending Predecessor						
🖃 Action Items	s 🔄 🖻 Notes 🗍 🧃	Notifications	Baselines L	References	User Data		
Details	Resources	Cost	Exceptions	Predece	ssors		
Туре	Project	Name	ID/Seq	Relatio	nship		
Task/Project	Development Laptop	Cost Analysis	5	Finish-Start			
Add Rem	10Ve				Open		
				OK Apply	Cancel		
Ready							

2. Click ADD. A line is added to the **PREDECESSORS** tab table.

🌺 Task Information	n: Purchase New Lapto	ps			×			
Task Name: 🖡	Task Name: Purchase New Laptops							
Task Category:	Task Category: Task State: Pending Predecessor							
E Action Items	E Notes	Notifications	Baselines	E References	User Data			
Details	Resources	Cost	Exceptions	Predecess	sors			
Туре	Project	Name	ID/Seq	Relations	:hip			
Task/Project	Development Laptop	Cost Analysis	5	Finish-Start				
Task/Project	Development Laptop			Finish-Start				
Add	INVE				Open			
			Г					
				OK Apply	Cancel			
Ready								

- 3. In the TYPE column, select **REQUEST** from the drop down list.
- 4. In the ID/SEQ column, select the Request ID from the auto-complete list.
- 5. In the Relationship column, select **Finish-Start** or **Finish-Finish** from the drop down list.

🌺 Task Information	: Purchase New Lapto	ops					
Task Name: F	Task Name: Purchase New Laptops						
Task Category:	Task Category: Task State: Pending Request 30008 - 0%						
E Action Items	🖻 Notes 🔤	🗉 Notifications	Baselines	📃 Referer	nces User Data		
Details	Resources	Cost	Exceptions		Predecessors		
Туре	Project	Name	ID/Seq		Relationship		
Task/Project	Development Laptop	. Cost Analysis	5	Finish	-Start		
Request		PFM - Project Re.	30008	Finish	n-Finish 🕒		
Add Rem	ove				Open		
				ОК	Apply Cancel		
Ready							

6. Click **APPLY** to save changes and continue working in the TASK INFORMATION window. Click **OK** to save changes and close the TASK INFORMATION window. Click **CANCEL** to close the TASK INFORMATION window without saving any changes.

Creating a Master Project Schedule

Kintana Drive generates schedules for Master Projects, based on the configurations set in the **SCHEDULING** tab of the SETTINGS window. The following are common tasks and items associated with scheduling:

- Generating the Schedule
- Scheduling Errors
- Scheduling Warnings

Generating the Schedule

To generate the schedule for a Master Project:

1. In the PROJECT window, click **SCHEDULE PROJECT**. The SCHEDULING window opens.



- 2. Specify whether you wish to schedule the entire project or part of it.
 - a. To schedule the whole project, select SCHEDULE WHOLE PROJECT.
 - b. To schedule only a specific part of the project, make sure you have selected the part you wish to schedule in the Project Plan Panel, and select **SCHEDULE SELECTED PART OF PROJECT**. If a Subproject is clicked, all of its children will be scheduled.
- 3. Specify a date to begin scheduling from by clicking on and selecting from the START SCHEDULING FROM calendar.
- 4. Click Schedule.



If scheduling *errors* occur, no schedule will be generated and a list of errors will appear. Take note of each error and its cause, and make the necessary adjustments within the Project. See *"Scheduling Errors"* on page 104 for more details.

If scheduling *warnings* occur, a schedule will be generated and a list of warnings will appear. Take note of each warning, as they may be important to the initiative's success. See *"Scheduling Warnings"* on page 105 for more details.

Scheduling Errors

It is possible for certain combinations of input to cause a schedule to be unworkable. If any of these errors are encountered, the schedule will not be created.

Scheduling Error	Cause	Possible Solution
CIRCULAR DEPENDENCY	The predecessors of a set of projects or tasks contains a cycle. This cannot be scheduled.	Break the cycle by removing or changing a predecessor.
NOT ENOUGH AVAILABLE RESOURCES FOR TASK	The amount of working days available from the pool of resources assigned to a task is less than the duration of the task. This situation can occur if a resource does not have any available working days, or perhaps for contractors who only have set periods of time to work.	Assign more resources to the task, increase resource availability via resource calendars, or change the Scheduling setting to require less resource availability.
SELECTED SUBPROJECT HAS DEPENDENCIES OUTSIDE OF ITEMS TO BE SCHEDULED	There are tasks or projects that are not in the selected sub-tree, but have predecessors in the selected sub-tree.	Select a larger sub- tree that includes all dependents, or remove the dependencies.
NO TASKS TO BE SCHEDULED	There are no non-complete, non- cancelled tasks within the selected sub- tree to be scheduled	Add tasks, or select a larger sub-tree that includes non-complete or non-cancelled tasks.

Table 6-5. Scheduling Errors, Causes, and Possible Solutions

Scheduling Warnings

It is possible for certain combinations of input when using actual-based scheduling or scheduling constraints to cause a schedule to be potentially unworkable. Warnings appear when actual-based scheduling has been specified. The schedule will still be created, however.

Table 6-6. Scheduling Warnings Dialog

Scheduling Warning	Cause	Possible Solution
DURATION EXTENDS PAST FINISH DATE FOR TASK	The duration for a task is longer than the number of available working days between the earliest possible start date and the actual finish date. This assumes there is no actual start date.	Move the actual finish date, change the duration, or change the number of available working days.

Scheduling Warning	Cause	Possible Solution
DURATION DOES NOT FIT WITHIN ACTUAL DATES OF TASK	The duration of a task is longer than the number of available working days between the actual start and finish dates.	Change actual dates, duration, or number of available working days.
ACTUAL START DATE OF TASK OCCURS BEFORE PREDECESSOR FINISHES	The actual start date of a task occurs before its earliest possible start date.	Change actual start date, predecessors, or the earliest possible start date.

Table 6-6. Scheduling Warnings Dialog

Establishing a Project Baseline

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

The following topics discuss baselines in more detail:

- Selecting Baseline Fields
- Taking a Baseline
- Managing Baselines
- Comparing Baselines

Selecting Baseline Fields

You can select any of the following Project fields to capture in a baseline:

- Summary Condition
- Scheduled Start
- Scheduled Duration
- Scheduled Finish
- Scheduled Effort
- Predecessor Information

- Resource/Project Manager
- Department
- Description
- Priority
- Resource Group
- Task Category
- Planned Labor
- Planned Non-Labor
- Planned Cost

To select fields for a baseline:

- 1. Open the Project you wish to take a baseline for.
- 2. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.

MSP Synch	nronization	Cost Management	Reso	ource Manage	ment	Time Manager	nent Baseline
Project Fields Ex		Exception Rules	Indicator	rs Scheduling		Security	Project Team
This tab configures the Project fields that can be displayed in the "Plan" tab of the Project window, and also the Project and Task detail pages and My Task portlet in the standard Kintana interface. Changing the field configuration here does not change the display in the other tabs of the Project Window.							
Planning Fields				CActivity Fields			
	Workbench				Workbench		
Enabled	Only	Fields		Enabled	Only	Fields	
	Г	Department				% Complete	
	Г	Description				Actual Duration	
Г	Г	Last Update Date			Г	Actual Effort	
	Г	Priority				Actual Finish Dat	e
_		Droinet/Took #			Г	Actual Start Date	
-	_	Froject/Task #				Confidence	
_		Resource Group			Γ	Estimated Finish I	Date
		Scheduled Effort				Estimated Remain	ning Duration
		Task Category				Estimated Remain	ning Effort
	Г	Planned Labor			Г	Actual Labor	
	Г	Planned Non-Labor			Г	Actual Non-Labo	r
	Г	Planned Total			Г	Actual Total	
				L			
						OK	Annly Canc

3. Click the **BASELINES** tab.

Project Fields	Exception R	ules	Indicators	Scheduling	Secu	irity P	roject Team		
MSP Synchronizatio	on Cost Man	agement	Resource	Management	Time M	Time Management B			
Select the active baseline for this project. To change the name and description of a baseline, click into the name and description fields respectively)									
Active	Name	Des	scription	Baselined E	Зу	Basel	lined On		
							Delete		
Baseline Fields hoose which baseline	fields you would like t	o display for a	all baselines for thi	s project:	Salaataa	l Fielde:	Delete		
3aseline Fields hoose which baseline Department	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	l Fields:	Delete		
3aseline Fields hoose which baseline Department Description	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	l Fields:	Delete		
Baseline Fields hoose which baseline Department Description Planned Cost	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	l Fields:	Delete		
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	l Fields:	Delete		
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	I Fields:	Delete		
Saseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	all baselines for thi	s project:	Selected	I Fields:	Delete		
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	all baselines for this	s project:	Selected	l Fields:	Delete		
Baseline Fields Thoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	all baselines for this	s project:	Selected	l Fields:	Delete		

- 4. In the BASELINE FIELDS section, double-click the fields or use the arrow buttons to move fields from the AVAILABLE FIELDS list to the SELECTED FIELDS list.
- 5. To apply changes to the Project and continue to set baseline options without closing the window, click **AppLy**.
- 6. To apply changes to the Project and close the window, click **OK**.

Taking a Baseline

To take a baseline:

- 1. Open the Project you wish to take a baseline for.
- 2. Select **PROJECT -> BASELINE** from the menu at the top of the Kintana Workbench. The BASELINE window opens.

Please sper pecome the	ify the name ar active baseline	nd description	n of the new bas	eline. It will
Name:	Baselined On	6/9/03		
Description:				
			OK	Cancel
Ready				

- 3. Enter a NAME and optional DESCRIPTION for the baseline.
- 4. Click OK.

The baseline has been taken. It can be viewed from the **BASELINES** tab of the **PROJECT** window.

5. Click **SAVE** to save the baseline along with the Project.

Managing Baselines

Multiple baselines can be taken for a single Project. You can specify which is the active Project baseline, as well as delete baselines at any time.



While any Project Manager can see the active baseline for a Project, only the Project Manager for the Master Project can manage baselines (take new baselines, delete baselines, specify the active baseline).

To manage Project baselines:

- 1. Open the Project you have taken baselines of.
- 2. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.

Settings for D	evelopment	Laptop Upgrade					>	
MSP Synchr	onization	Cost Management	Res	ource Manage	ement	Time Managen	nent Baselines	
Project Fiel	Project Fields Exception Rules Indicator			rs Sc	heduling	Security	Project Team	
This tab configures the Project fields that can be displayed in the "Plan" tab of the Project window, and also the Project and Task detail pages and My Task portlet in the standard Kintana interface. Changing the field configuration here does not change the display in the other tabs of the Project Window.								
Planning Fields—				CActivity Fields	s			
	Workbench				Workbench			
Enabled	Only	Fields		Enabled	Only	Fields		
	Г	Department				% Complete		
	Г	Description				Actual Duration		
	Г	Last Update Date				Actual Effort		
	Г	Priority				Actual Finish Dat	e	
	Г	Proiect/Task #				Actual Start Date		
	Г	Resource Group				Confidence		
		Scheduled Effort				Estimated Finish I	Date	
	-					Estimated Remain	ing Duration	
		Task Category				Estimated Remain	ing Effort	
	Г	Planned Labor				Actual Labor		
		Planned Non-Labor				Actual Non-Labo	r	
	Г	Planned Total				Actual Total		
						ОК	Apply Cancel	
Ready								

3. Click the **BASELINES** tab.

Project Fields	Exception R	ules	Indicators	Scheduling	Secu	urity Pr	oject Team	
MSP Synchronizatio	n Cost Man	agement	Resource	Management	Time M	anagement	Baseline	
elect the active baseline for this project. To change the name and description of a baseline, click into the name and description fields respectively)								
Active	Name	Des	scription	Baselined B	Зy	Baseli	ned On	
							Delete	
Baseline Fields	fields you would like t	o display for a	Il baselines for thi	s project:			Delete	
Baseline Fields hoose which baseline	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Gaseline Fields hoose which baseline Department	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields hoose which baseline Department Description Planned Cost	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields hoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields thoose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields Choose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	
Baseline Fields Choose which baseline Department Description Planned Cost Planned Labor Planned Non-Labor	fields you would like t Available Fields:	o display for a	Il baselines for thi	s project:	Selected	l Fields:	Delete	

- 4. Select the radio button next to the baseline you wish to be active for the Project.
- 5. (optional) Highlight a baseline you wish to delete and click **Delete**.
 - a. A dialog box will open asking if you are sure you want to delete the baseline.

🌺 Dele	te Baseline	×
٩	This is the ACTIVE baseline. Do you still want to delete it ?	
	Yes	

- b. Click **YES** to delete the baseline.
- 6. To apply changes to the Project and continue to set baseline options without closing the window, click **APPLy**.
- 7. To apply changes to the Project and close the window, click **OK**.

Comparing Baselines

The Project Schedule Change Report can be used to compare baselines to each other, or to the Project schedule as it currently stands. For more detailed information about the Project Schedule Change Report's parameters, see *"Kintana Reports"*.

Chapter Configuring Tasks

Kintana Projects are repositories of information consisting of Tasks, Action Items, Subprojects, Notes and References. These elements define and process specific business initiatives within an organization. Projects are not static entities. They gather additional information and are modified as they move through their Tasks to completion.

Tasks are the components of a Project that must be completed in order for the Project to complete successfully. Project Managers gather the information from Tasks and make appropriate changes to them through the life of the Project. This means the Tasks must be configured to deliver the kinds of specific information that Project Managers need. For example, Project Managers may need to be notified when Tasks are completed or their states change.

Tasks also need to be modified as issues arise during the Project, such as extending Task schedules or assigning additional resources to a Task to make a deadline. Team members must update their individual statuses as they complete assigned Tasks.

The following sections discuss the processes and elements used for configuring Tasks within a Project:

- Task Elements
- Adding Tasks to Projects
- Editing Task Information
- Assigning Resources
- Adding Action Items
- Adding Notes
- Setting Up Notifications

- Attaching References to Tasks
- Configuring Task Predecessors
- Changing the Task State
- Setting Scheduling Constraints
- Configuring User Data

Task Elements

The following elements within Kintana Projects contribute to the information delivered by Tasks:

- Notifications
- References
- Task Categories
- Task States

Notifications

Project Managers can set up notifications for Tasks within a Project. Email messages can be sent to appropriate team members whenever a specific event occurs on a Task. This would include such events as:

- The completion of a Task.
- The changing of a Task's state designation. For example, the Task could progress from 'Ready' to 'In Progress.'
- The triggering of an Exception Rule by a Task.
- The arrival of a Task's start or finish date approaches.

References

Tasks can include additional references to other entities or points of information, allowing easy access and visibility to data related to the current Task. Summary information for references is viewed as part of the Task.

There are several reference types defined for Tasks: Requests, Packages, Projects, Releases, Attachments and URLs.



Project Managers can create Tasks from Requests in the Kintana Workbench. Once the Task is created, it automatically has a Reference to the originating Request. See the *Creating a Task From a Request* section in this chapter.

Task Categories

Tasks can be grouped in user-defined categories. For example, certain tasks could be grouped within a Design category, while other Tasks could be grouped within a Production category.

Task States

In the Kintana Workbench, the Task State is displayed in the STATE column of the PROJECT window. The available states for a Task are defined in *Table 7-1*.

Task State	Definition
New	A newly created Task starts in this state.
PENDING PREDECESSOR	A Task that is holding for one or more predecessors to be completed.
PENDING REQUEST	A Task that is holding for one or more Requests to be completed.
Ready	A Task that is ready to be worked on by its Resource.
IN PROGRESS	A Task that is moving through the actions necessary for its completion.
COMPLETED	A Task that has been finished.
CANCELLED	A Task that is not complete and will not be worked on, as it is no longer required for the completion of the Project.
BYPASSED	An incomplete Task that is left unfinished after the Project is completed.

Table 7-1. Task State Definitions



Depending on their defined level of responsibility in a Project, users may only be able to change Tasks between certain states.

For example, Project Managers can change a Task from **READY** to **IN PROGRESS** to **CANCELLED**, or from **BYPASSED** back to **READY**. Project Participants are only able to change a Task from **READY** to **IN PROGRESS** to **COMPLETE**.

Available Task states may also depend on the state of the Project.

Adding Tasks to Projects

Tasks can be added to a Project individually or in a pre-sequenced group, as defined in a Project Template. Tasks can also be quickly and easily organized in a hierarchical fashion. See "*Adding Tasks to a Project*" on page 84 for more information.

Creating a Task From a Request

A Task can be created from a Request on the Project window in the Kintana Workbench. The new Task will have a Reference to the originating Request.

To create a Task from a Request:

1. Go to the Project Plan Panel.

🙋 Ргој	ect : I	mplementation Lifecycle						
Pla	an	Cost EV Analysis Basel	ines			Gantt Chart:	22	A Display Options
Seq	1	Name	State	Sc	June 2003	11 12	13	14 15
1		⊡Implementation Lifecycle	New					
	•	Define Project Objectives	New	F				
↑		Edit Delete 🕂 All					Refresh	Schedule Project
Task C	reate	d From Request 💽 Add					ок в	Save Cancel
Ready								

- 2. Select **TASK CREATED FROM REQUEST** from the drop down list at the bottom left corner of the window.
- 3. Click ADD. The NEW TASK FROM REQUEST window opens.



4. Specify the Request(s) you want to use in the REQUEST NO. auto-complete list.

Or

Click Search to search for the Request(s). The Request Selection window opens.

Request Selection	X
Request No.:	Request Type: Query: None 🔽
Department: ALL	Sub-Type: Created By:
Workflow:	Linked Project/Task: Contact Name:
Priority: ALL	Request Group: Company: 🔢
Assigned User:	Assigned Group: Application: Application:
Keywords:	
Request Status:	
	include Closed Requests: O Yes 💿 No Only Eligible Requests: O Yes 💿 No
Dates	
C Date Created 💿 (Jn 🔟 To 🔟
◯ Date Modified ◯ ∖	Within last 1 day(s)
	Max Rows 200 Clear List
Relationship: Task L	Jpdated by Request
This task is automa	tically updated by selected request
Query Results	
Request No.	Request Type Request Status Priority Description Created By Request Grou
	OK Add Cancel
Ready	

5. Search for the Request(s) you want to use by entering search criteria in the appropriate fields and clicking LIST.

The Requests that match your search criteria display in the QUERY RESULTS section of the window.

Select	lion					×				
Select the Relationship that the selected Request has to Task (New):										
Query Results										
Request No.	Request Type	Request Status	Priority	Description	Created By					
30002	PFM - Project Request	New	Normal	Paper Free	admin					
4						Þ				
				ОК	Add Canc	el				
1 Request Records	s are loaded.									

6. Select the Request(s) in the QUERY RESULTS section that you want turn into Task(s).

You can select multiple Requests in the QUERY RESULTS section. When they are added to the Project Plan, a new Task is created for each selected Request.

- 7. TASK UPDATED BY REQUEST is specified as the RELATIONSHIP.
- 8. Click **OK** to create the new Task and close the window. Click **ADD** to create the new Task and perform additional searches for more Requests.

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

You can change the Reference for this Task at any time by double-clicking it, opening the TASK INFORMATION window and editing it in the **REFERENCES** tab.

9. Click **SAVE** to save the new Task and leave the PROJECT window open. Click **OK** to save the new Task and close the PROJECT window.

Creating a Milestone

Milestones can be created for a Project plan in the same way as Tasks.

To create a Milestone:

1. Within the PROJECT window, click ADD TASK. A new Task appears in the Project Plan Panel below the current selection.

You can also add a new Task by selecting the last item in the Project Plan Panel and pressing Insert or the down arrow on your keyboard.

🙋 Proje	ect : li	mplementation Lifecycle							_ 🗆 ×
Pla	n	Cost EV Analysis Baselines	1			Gantt Chart:	22	8	Display Options
Seq	!	Name	State	Sc	June 2003	1 1			
			ulau u	-	09 10	11 12	13	14	15
2		Define Project Objectives	Vew						
	-								
-	·					_			
	(Edit Delete	All				Refresh	Sci	nedule Project
Task	_	▼ Add					ок	Save	Cancel
Ready									

2. Double click on the new Task. The TASK INFORMATION window opens.

Task Information: D	efine Project O	bjectives			2
Task Name: Def	ne Project Obje	ctives			
Task Category:		~	Task State: New		•
E Action Items	🖃 Notes	🗉 Notifications	Baselines	E References	User Data
Details	Resources	Cost	Exceptions	Predec	essors
Task #: 30649		Department:	Ţ	Template:	
Project Path: Implem	entation Lifecycl	e			
Resource:	⊞	Resource Group:		Ð	
Description:				Priority:	
% Complete: 0		Confidence:	v]	
Milestones					
Mark task as mile:	stone				
Milestone automat	ically completes				
Start Date			Finish Date		
Sch	eduled: June 9, 3	2003 🔟	Sc	cheduled: June 9, 200	13 🔟
				istimated:	17
	Actual:	10		Actual:	
Duration (days)			Effort (hours)		
Sch	eduled: 1.0		So	cheduled: 8.0	
Est. Ren	raining:		Est. R	emaining:	
	Actual:			Actual:	
-Scheduling Constraints					
Constrair	nt Type: No Con	straints 💌	Constra	aint Date:	<u>in</u>
				OK Apply	Cancel
Ready					

- 3. Select the MARK TASK AS MILESTONE check box. If you want the Milestone to mark itself as Complete automatically upon being reached, select the MILESTONE AUTOMATICALLY COMPLETES check box.
- 4. Modify the information under each tab in the TASK INFORMATION window as necessary (for details, see "*Editing Task Information*" on page 121).
- To apply changes to the Task without closing the window, click APPLY. To apply changes to the Task and close the TASK INFORMATION window, click OK. To close the TASK INFORMATION window without saving changes, click CANCEL.

Note

A Task will be automatically converted to a Milestone if its duration is 0.

Editing Task Information

Users with appropriate security permissions can edit information for Tasks displayed in the Project Plan Panel. Task information can be edited directly in the Project Plan Panel, or in the Task Information window.

To edit Task information from the Project Plan Panel

- 1. Locate the Task you wish to edit.
 - If you are editing an existing Task, query and open an existing Project.
 - If you are editing a newly created Task, you are already in the Project Plan Panel.
- 2. Click on any desired fields to edit their contents directly.
- 3. Click **OK** or **SAVE** to save the information.

To edit Task information in the Task Information window

- 1. Locate the Task you wish to edit.
 - Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

• Query and open an existing Project.

Double-click the Task you want to edit, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. Make whatever changes are necessary in the TASK INFORMATION window.
- 3. Click **OK** or **SAVE** to save the information.



Updating information in the Project Plan Panel is more direct, while more detailed information can be edited in the Task Information window.

Assigning Resources

Users with appropriate security permissions can assign Resources to Tasks displayed in the Project Plan Panel. Resources can be assigned directly in the Project Plan Panel, or in the TASK INFORMATION window. The following sections discuss Resource-related topics in more detail:

- Assigning Resources in the Project Plan Panel
- Assigning Resources in the Task Information Window
- Assigning Multiple Resources in the Task Information Window
- Assigning Resource Groups
- Determining Project Resources

Assigning Resources in the Project Plan Panel

Resources can be assigned for existing Tasks and new Tasks.

- If you are assigning Resources to an existing Task, query and open the Project containing the Task.
- If you are assigning Resources to a newly created Task, you are already in the Project Plan Panel.
- 1. Select the Task to which you want to assign Resources.
- 2. Click the auto-complete icon in the RESOURCE/PROJ MANAGER column field.
 - a. The VALIDATE window showing all the available resources opens.

- b. From the VALIDATE window, select a resource.
- 3. Click **OK** or **SAVE** to save the information.

Assigning Resources in the Task Information Window

Resources can be assigned to existing Tasks and new Tasks.

- If you are assigning Resources to an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task to which you want to assign Resources, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are assigning Resources to a newly created Task, you are already in the Project Plan Panel.

Double-click the Task to which you want to assign Resources, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 1. Click the **DETAILS** tab.
- 2. In the RESOURCE field, click the auto-complete list icon.
- 3. From the VALIDATE window, select a Resource.
- 4. Click **OK** or **APPLY** to save the information.

Assigning Multiple Resources in the Task Information Window

Multiple Resources can be assigned to existing Tasks and new Tasks. Once multiple Resources have been assigned, their individual effort hours or Booked Skill can be adjusted at any time.

- If you are assigning multiple Resources to an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task to which you want to assign multiple Resources, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are assigning multiple Resources to a newly created Task, you are already in the Project Plan Panel.

Double-click the Task to which you want to assign multiple Resources, or select it and click **EDIT**. The TASK INFORMATION window opens.

1. Click the **Resources** tab.

Task Name: Roll	-Out						
ask Category:		7	Task	State: Pending Pre	edecessor		-
🖹 Action Items	🗉 Notes 📗	🖃 Noti	fications	Baselines	🖻 Referen	ices	User Data
Details	Resources		Cost	Exceptions	ĺ	Predece	ssors
dd multiple resourc	es to this task o	r modify pa	artial effort	for individual reso	urces		
ask Duration: 2.0	days						
ask Start: July 10,	2003		١	Task Finish: July 1	1,2003		
Edit Booked Skill or	Partial Effort:						
F	Resource			Booked Skill	I	Eff	ort (hours)
I O IO IO O IOO ITIO			B 1 1 1 1				4.0
jonnsmun			Project M	anager			16
jornsmur			Project M	anager			16
Remove			Project M	anager Tr	otal Effort (hou	rs): 16.	16 D
Remove	sk:		Add	anager Tr View Resource	otal Effort (hou Details	rs): 16.	16 0

- 2. Specify a Resource in the ADD RESOURCE TO TASK auto-complete list and click **ADD**. Repeat as necessary.
- 3. If the Resource has more than one Skill defined, choose the appropriate Skill from the auto-complete in the BOOKED SKILL column.
- 4. To adjust the number of effort hours for a Resource, click the numeric field in the EFFORT (HOURS) column and enter a new value.

5. Click **APPLY** to store the information and continue to work in the TASK INFORMATION window, or click **OK** to save the information and close the window. The Resource assignments will not be saved until you click either.

Assigning Resource Groups

In order to add Resource Groups, first make sure that the field is enabled in the Project Settings. See "*Selecting Information to Track and Display*" on page 61 for details.

Determining Project Resources

Project Managers can specify users who will be allowed to act as Resources for a Project. In the **PROJECT TEAM** tab of the **PROJECT SETTINGS** window, the Project Manager can choose to either:

• Allow all users with the **PROJECT** option enabled in their Security Groups to be Resources for a Project.

Or

• Allow only those Resources who are specified in the **PROJECT TEAM** tab to be used as Resources for a Project. These Resources are listed in the tab's RESOURCE table.

See "*Setting Up the Project Team*" on page 77 for more information about setting up the resources in the **PROJECT TEAM** tab for a Master Project.

Adding Action Items

Action Items are used to capture important "to do" items that do not require the formal definition, tracking, and hierarchical restrictions of a Task. Action Items are added in the TASK INFORMATION window.

- 1. Action Items can be added to existing Tasks and new Tasks.
 - If you are adding an Action Item to an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task to which you want to add an Action Item, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are adding an Action Item to a newly created Task, you are already in the Project Plan Panel.

Double-click the Task to which you want to add an Action Item, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. In the TASK INFORMATION window, click the **ACTION ITEMS** tab.
- 3. Click ADD. The ACTION ITEM window opens.
- 4. Enter information in the required fields and drop down lists.

Select REQUIRED = **YES** if you want the Action Item to be required. The Task will not complete until the Action Item has been completed.

- 5. Click ADD to add the Action Item and continue to create more, or click OK to add the Action Item and close the window.
- 6. Click **APPLY** to store the information and continue to work in the TASK INFORMATION window, or click **OK** to save the information and close the window. The Action Item will not be saved until you click **OK**.
- 7. If the TASK INFORMATION window is opened from the Project Plan Panel, you must click **OK** or **SAVE** in the PROJECT window to save the task information.

Adding Notes

Users can enter free-form text in the **NOTES** tab of the TASK INFORMATION window. Saved entries are marked with a timestamp. To add Notes to a Task:

- 1. Notes can be added to existing Tasks and new Tasks.
 - If you are adding a Note to an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task to which you want to add a Note, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are adding a Note to a newly created Task, you are already in the Project Plan Panel.

Double-click the Task to which you want to add a Note, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. In the TASK INFORMATION window, click the **Notes** tab.
- 3. Enter any Notes into the NEW NOTES text field.

To increase the viewable area, click ENLARGE.

- 4. Click **APPLY** to store the Notes and continue to work inside the TASK INFORMATION window, or click **OK** to save the Notes and close the window. The Notes will not be saved until you click **OK**.
- 5. Click **OK** or **SAVE** in the PROJECT window to save the task information.

Setting Up Notifications

Notifications are set up in the TASK INFORMATION window.

- 1. Notifications can be set up for existing Tasks and new Tasks.
 - If you are setting up notifications for an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task to which you want to set up notifications, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are setting up Notifications for a newly created Task, you are already in the Project Plan Panel.

Double-click the Task to which you want to set up notifications, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. In the TASK INFORMATION window, click the NOTIFICATIONS tab.
- 3. Click New. The ADD NOTIFICATION FOR TASK window opens.
- 4. In the **SETUP** tab, enter information in the required fields. The EVENT drop down list allows you to choose to send a Notification based on any of the following criteria:
 - The Task has reached a specific state.
 - The Task has triggered a particular Exception.
 - The Task's Scheduled Start or Finish date is approaching, has arrived, or has passed.
- 5. To add a new user to the Recipients, click **New**. The ADD NEW RECIPIENT window opens.
- 6. Enter information in the required fields.
- 7. Click ADD to add the new recipient. Note that the enabled MULTI capability of the USERNAME auto-complete list enables you to select multiple recipients. Click OK to return to the ADD NOTIFICATION FOR TASK window. Click CANCEL to return to the ADD NOTIFICATION FOR TASK window without saving any changes.
- 8. (Optional) In the ADD NOTIFICATION FOR TASK window you can use the EDIT and DELETE buttons to modify the list of recipients. Click TOKEN to view the available tokens.
- 9. (Optional) Click the **MESSAGE** tab in the ADD NOTIFICATION FOR TASK window if you want to view and edit the Message Notification Template.
- 10. (Optional) Notifications can be configured to include the Web address (URL) for a specific Project or Task. This is referred to as a Smart URL. You can include a Smart URL token for the Notification. See the next section, Using Smart URLs in Notifications, for more information.
- 11. Click **OK** to close the window.

Using Smart URLs in Notifications

Notifications can be configured to include the Web address (URL) for the specific Project or Task. When users receive a Notification email and click the URL, they are taken directly to the Project or Task. The available Tokens for Projects and Tasks are described in *Table 7-2*.

Table 7-2. Smart URL Tokens

Smart URL Token	Description
PROJECT_URL	URL to access the PROJECT OVERVIEW page for this Project.
WORKBENCH_PROJECT_URL	URL to access the PROJECT window for this Project in the Kintana Workbench.
TASK_URL	URL to access the TASK DETAIL page for this Task.
WORKBENCH_TASK_URL	URL to access the TASK window for this Task in Kintana Workbench.

To use a Smart URL:

- 1. Follow the procedure described in "Setting Up Notifications" on page 127.
- 2. Open the TASK INFORMATION window.
- 3. Click the **NOTIFICATIONS** tab.
- 4. Click New. The ADD NOTIFICATION FOR TASK window opens.
- 5. Click the **Message** tab.
- 6. Click TOKENS. The TOKEN BUILDER window opens.

Token Builder		>
Token Context	Tokens	
🔄 Token Context	Token	Description
App Server	PARENT_PROJECT_NAME	Name of the Project containing this Project
🔁 Notification	PERCENT_COMPLETE	Percent Complete of the Project
🚊 🗠 🔁 Project	PRIORITY	Priority of the Project
Synchronization History	PROJECT_ID	Unique ID for this Project (same as Project Num
Contraction Security Group	PROJECT_MANAGER	ID of the Project Manager for this Project
- Gystem	PROJECT_MANAGER_EMAIL	Email address of the Project Manager for this Pr
🗄 🗂 Task	PROJECT_MANAGER_USERN	Username of the Project Manager for this Project
User	PROJECT_NAME	Project Name
	PROJECT_NUMBER	Unique ID for this Project (same as Project ID)
	PROJECT_PATH	Project Path for this Project
	PROJECT_STATE	Project State
	PROJECT_TEMPLATE	Name of the Template used to create this Project
	PROJECT_TYPE_CODE	Returns TASK for Tasks and PROJECT for Proj
	PROJECT_URL	URL to access the Project Overview page for th
	SCHEDULED_DURATION	Scheduled Duration for this Project
	SCHEDULED_EFFORT	Scheduled Effort for this Project
	SCHEDULED_FINISH_DATE	Scheduled Finish Date for this Project
	SCHEDULED_START_DATE	Scheduled Start Date for this Project
	SUMMARY_CONDITION	Summary Condition for this Project
	UD.CONTINGENCIES	
▲	WORKBENCH_PROJECT_URL	URL to access the Project Window for this Proj
Context Value:		
Tokon: [[PP]		•••
i oken. [[Fhu.]		
Refresh		Close

7. Click either the Project or Task folder to display the list of Tokens.

The figure above shows the Smart URLs for Projects.

- 8. In the TOKEN column of the window, select the appropriate Token from the list of Tokens, such as PROJECT_URL or WORKBENCH_URL for Projects. The Token you select displays in the Token field.
- 9. Select the Token in the TOKEN field.
- 10. Press Ctrl + c to copy the Token's name.
- 11. Click **Close** to close the TOKEN BUILDER window.
- 12. Click in the Notification's Body text section at the point where you want to insert the Smart URL.
- 13. Press Ctrl + v to paste the Smart URL's Token in the Body section.

The figure below shows the Project URL in the Body section of an HTML-format Notification.

lotification T	emplate: Standard HTML Message (H1	'ML)	-
lotification Fo	ormat: JHIML		
From:		Choose	Clear
Reply To:		Choose	Clear
Subject: Ki	ntana - Drive Alert		
Body:			
nowrap>(class="r nowrap>N	<pre> <tc><tc>width="100" class="n)pen Project Overview: >ctd width="200" width="100" class="n Jotified Users: width="200" width="200"</tc></tc></pre>	otification ECT_URL] t otification	bold" d> bold"

14. Click **OK** to close the ADD NOTIFICATION FOR TASK window.

15. Click **OK** to close the TASK INFORMATION window.

The email Notification sent from this Task will contain a URL to open a specific Project or Task.

Nested Tokens in Notifications

Notifications can be configured to include Project information using Tokens. As Project hierarchies become more complex, Token syntax can become correspondingly involved.

For example, consider a Project with the following structure:



A Notification from Task 2 can use Tokens to refer to Project information on any level above it. The sample Notification below displays the Project Name for the Master Project and its Subprojects.



Entering Cost Data

If Kintana Drive's Cost Management capability has been enabled for this Project, you can track and enter Actual Cost data in the PROJECT window. See *"Entering Actual Cost Data"* on page 46 for more detailed information.
Attaching References to Tasks

Kintana features a number of methods for capturing additional information, or References, related to your Projects. References are attached from the Task Information window.

To attach References to a Task:

- 1. Open the TASK INFORMATION window.
 - If you are attaching References to an existing Task, choose one of the following methods:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

- Query and open an existing Project. Double-click the Task to which you want to attach References, or select it and click EDIT. The TASK INFORMATION window opens.
- If you are attaching References to a newly created Task, you are already in the Project Plan Panel. Double-click the Task to which you want to attach References, or select it and click **EDIT**. The TASK INFORMATION window opens.
- 2. In the TASK INFORMATION window, click the **References** tab.
- 3. Attach the Reference. In the Kintana Workbench, users can perform the following Reference activities for their Tasks:
- "Attaching Existing Requests" on page 134
- "Attaching New Requests" on page 136
- "Attaching Packages" on page 137
- "Attaching New Packages" on page 140
- "Attaching Tasks" on page 140
- "Attaching Releases" on page 143
- *"Attaching Documents"* on page 143
- "Attaching URLs" on page 144

Attaching Existing Requests

To attach an existing Request to a Task:

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

New Reference - Request (Existing)	×
Request No.:	
Select the Relationship that the selected Request has to Task 30286:	
🕫 Related to this Task - (Informational) - Selected Request is related to Task 30286	
C Successor - (Blocked) - Action not allowed on selected Request until Task 30286 closes	
C Predecessor - (Blocking) - Action not allowed on Task 30286 until selected Request closes	
C FF Predecessor - (Finish Finish Predecessor) - Task 30286 does not complete until selected	Request closes
C Task Updated by Request - (Auto-Updating) - Task 30286 is automatically updated by selected	ed Request
Search	OK Cancel
Ready	

- 5. To select the Request to attach, use one of the following methods:
 - Enter the Request Number in the REQUEST NO. field or click the REQUEST NO. auto-complete list icon to locate and select the Request in a VALIDATE window. (Hold down Ctrl+Click or Shift+Click to select more than one Request.) The selected Request displays in the REQUEST NO. field. If you selected multiple Requests, they all display in the REQUEST NO. field separated by semi-colons.
 - Click **SEARCH** to search for Requests in a separate query window and follow the procedure in *"Searching for Requests to Attach"* on page 135.
- 6. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Request displays as a Reference.

- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached Request as a Reference in the Project.

Searching for Requests to Attach

This procedure lets you specify criteria to search for Requests to attach to a Task.

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

Sequest Selection						×
Request No.:		Request Type:		E	Query:	None 💌
Department: ALL	•	Sub-Type:		•	Created By:	I
Workflow:	I	Linked Project/Task:		I	Contact Name:	I
Priority: ALL	•	Request Group:		I	Company:	≣
Assigned User:	I	Assigned Group:		I	Application:	I
Keywords:						
Request Status:						I
Include C	losed Requests:	🔿 Yes 💿 No	Only Eligi	ble Requests: 🤇	OYes 🖲 No	
Dates						[
O Date Created ⊙ 0	n 🗌			To		<u>1</u>
O Date Modified O W	ithin last 1	day(s) 💌				
l				Max Rows 12	Clear	List
Select the Relationship th	at the selected Req	uest has to Task 30266:				
Related to this Task -	(Informational) - Se	elected Request is related t	to Task 30286			
Successor - (Blocker	3) - Action not allow	ed on selected Request u	intil Task 30286 c	loses		
Query Results						
Request No.	Request Type	Request Status	Priority	Description	Created By	Reques
			,		,,,	
ll 4		I				
<u> -</u>						0
					OK Muu	Cancer
Ready						

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

The Requests that match your search criteria display in the QUERY RESULTS section of the window.

3. Select the Request(s) in the QUERY RESULTS section that you want to attach to a Task.

- 4. Select the type of relationship you want to assign between the Task and its Request. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 5. Click **OK** to attach the Request(s) to the Task and close the current window. You return to the **REFERENCES** tab in the TASK INFORMATION window.
- 6. After you return to the TASK INFORMATION window, the new attached Request displays as a Reference.
- 7. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 8. Click SAVE to save the attached Request as a Reference in the Project.

Attaching New Requests

A new Request can be created from the **REFERENCES** tab and immediately attached to a Task. This saves time from having to create a new Request in Kintana Create, searching for it, and attaching it to the Task. To attach a new Request to a Task:

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

New Reference - Request (N	ew)		
Request Type:			
Select the Relationship that the se	lected Request has to Task 30286:		
Related to this Task - (Inform	ational) - Selected Request is related to	o Task 30286	
C Successor - (Blocked) - Acti	on not allowed on selected Request un	ıtil Task 30286 closes	
O Predecessor - (Blocking) - A	tion not allowed on Task 30286 until s	elected Request closes	
C FF Predecessor - (Finish Fini	sh Predecessor) - Task 30286 does no	ot complete until selected Request closes	
O Task Updated by Request - (Auto-Updating) - Task 30286 is automa	itically updated by selected Request	
,			
		Create	Cancel
eady			

5. Click the REQUEST TYPE auto-complete list icon to open it and select a Request Type from the VALIDATE window.

- 6. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 7. Click CREATE. The Kintana interface opens with the Request Type loaded.
- 8. Enter any necessary information in the Request fields.
- 9. Click **SAVE**. The Request is submitted. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Request displays as a Reference.
- 10. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 11. Click SAVE to save the attached Request as a Reference in the Project.

Attaching Packages

To attach a Package to a Task:

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

Package No.:		E	
Select the Relationship that the	selected Package has to Task 30	0286:	
Related to this Task - (Info	ormational) - Selected Package is	related to Task 30286	

- 5. To select a Package for an attachment, use one of the following methods:
 - Enter the Package Number in the PACKAGE NO. field or click the PACKAGE NO. auto-complete list icon to locate and select the Package in the VALIDATE window. (Hold down Ctrl+Click or Shift+Click to select more than one Package.) The selected Package displays in the PACKAGE

No. field. If you selected multiple Packages, they all display in the PACKAGE No. field separated by semi-colons.

- Click **SEARCH** to search for Packages in a separate query window and follow the procedure in *"Searching for Requests to Attach"* on page 135.
- 6. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Package displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached Package as a Reference in the Project.

Searching for Packages to Attach

This procedure lets you specify criteria to search for Packages to attach to a Task.

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

🌺 Package Selection 🛛				×
Package No.:	Package Grou	up: 🔲	Query: N	one 💌
Workflow:		I	Package Status: Al	L
Assigned User:	Created I	By:	Priority: Al	L
Assigned Group:	Dbject Ty;	pe: 🔲	Package Type: Al	L
Object Name:		III		
Property	Dates			
Eligible Action Only	O Date Created 💿 Or	n 📃	1 T	
Submitted Only	C Date Modified C Date Submitted	ithin last da	W(S)	
			Max Rows [20]	Clear List
Colored Alexy Distriction along the	at the sector start Deptember is a to T	aak 30088-		
Related to this Task	ai the selected Package has to 1	ige is related to Task 30286	i	
Related to this Task Guery Results	a infersational) - Selected Package has to r	ge is related to Task 30286		
Related to this Task Ouery Results Package No	ea (Informational) - Selected Package riss to 1 (Informational) - Selected Packa	ge is related to Task 30286	Package Status	Priority Assigned
Related to this Task Guery Results Package No	ea (Informational) - Selected Packa (Informational) - Selected Packa Pescription Workflow	ge is related to Task 30286	; Package Status	Priority Assigned
Query Results	ea (Informational) - Selected Packa (Informational) - Selected Packa vescription Workflow	ge is related to Task 30286	Package Status	Priority Assigned
Related to this Task Ouery Results Package No	ea (Informational) - Selected Packa	ge is related to Task 30286	Package Status	Priority Assigned Priority Assigned K Add Cancel

2. Query for the Package(s) you want to use by entering search criteria in the appropriate fields and clicking LIST.

The Packages that match your search criteria display in the QUERY RESULTS section of the window.

- 3. Select the Package(s) in the QUERY RESULTS section that you want to attach to a Task.
- 4. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 5. Click **OK** to attach the Package(s) to the Task and close the current window. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Package displays as a Reference.
- 6. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 7. Click **SAVE** to save the new Package as a Reference in the Project.

Attaching New Packages

A new Package can be created from the **REFERENCES** tab and immediately attached to a Task. This saves time from having to create a new Package in Kintana Deliver, searching for it, and attaching it to the Task. To attach a new Package to a Task:

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

🌺 New Reference - Package (New)	×
Select the Relationship that the selected Package has to Task 30286:	
Related to this Task - (Informational) - Selected Package is related to Task 30286	
I Create	Cancel

- 5. Click **CREATE**. The PACKAGE window opens.
- 6. Enter any necessary information in the Package fields.
- 7. Click **SAVE**. The Package is submitted. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Package displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached Package as a Reference in the Project.

Attaching Tasks

To attach a Task to a Task:

- 1. Open the TASK INFORMATION window.
- 2. Click the **REFERENCES** tab.
- 3. Select **TASK** from the NEW REFERENCE drop down list.

4. Click ADD. The NEW REFERENCE - TASK window opens.

Fask Name:	I
Select the Relationship that the selec	ted Task has to Task 30286:
Related to this Task - (Informati	ional) - Selected Task is related to Task 30286

- 5. To select a Task for attachment, use one of the following methods:
 - Enter the Task Name in the TASK NAME field or click the TASK NAME autocomplete list icon to locate and select the Task in a VALIDATE window. (Hold down Ctrl+Click or Shift+Click to select more than one Task.) The selected Task displays in the TASK NAME field. If you selected multiple Tasks, they all display in the TASK NAME field separated by semi-colons.
 - Click **SEARCH** to search for Tasks in a separate query window and follow the procedure in "*Searching for Requests to Attach*" on page 135.
- 6. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Task displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click SAVE to save the attached Task as a Reference in the Project.

Searching for Tasks to Attach

This procedure lets you specify criteria to search for Tasks to attach to a Task.

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

Task Selection							×
		_	1				<u></u>
Query: N	lone	•				_	
Resource:			Resource Group:		Has Exceptio	n Of Type:	
Task Name:			Task#:		De	partment:	
Task Category:			Description:	<u> </u>			
Include Finished Tasks: 🤇	🗅 Yes 💽 N	10	Task State:				
Show only milestones?	Yes 💿 N	10					
Project Information							
Project Manager:			Pr	oject Name:			I
Scheduled Dates				tual Dates			
Start Date From:	To	:		Start Date From:		🔟 To:	12
Finish Date From:	To	:		nish Date From:		 🛅 То: 🗌	17
		<u> </u>					
		_		Max	Rows 200	Clea	ur List
•				Max	Rows 200	Clea	ar List
Select the Relationship that t	the selected Task	has to T	ask 30286:	Max	Rows 200	Clea	ır List
Select the Relationship that t	the selected Task	has to T	ask 30286: ask is related to Task	Max 30286	Rows 200	Clea	ır List
Select the Relationship that t	the selected Task	has to T ected Ta	ask 30286: ask is related to Task	Max 30286	Rows 200	Clea	ır List
Select the Relationship that t	the selected Task nformational) - Sel	has to T ected Ta	ask 30286: ask is related to Task	Max 30286	Rows 200	Clea	ır List
Select the Relationship that t	the selected Task nformational) - Sel Task Name	has to T ected Ta State	i <mark>ask 30286:</mark> ask is related to Task Task Category	Max 30286	Rows 200	ed Finish	Ir List
Select the Relationship that t © Related to this Task - (Ir Ouery Results Milestone 1	the selected Task (formational) - Sel Task Name	has to T ected Ta State	ask 30286: ask is related to Task Task Category	Max 30286 , Sched Ste	Rows 200	ed Finish	r List
Select the Relationship that t © Related to this Task - (Ir Ouery Results 	the selected Task Iformational) - Sel Task Name	has to T ected Ta State	ask 30286: ask is related to Task Task Category	Max 30286 7 Sched Ste	Rows 200	ed Finish	r List Resource
Select the Relationship that t C Related to this Task - (ir Cuery Results	the selected Task	has to T ected Ta State	ask 30286: ask is related to Task Task Category	Max 30286 7 Sched Sta	Rows 200 art Sch	ed Finish	r List Resource

2. Query for the Task(s) you want to use by entering search criteria in the appropriate fields and clicking LIST.

The Tasks that match your search criteria display in the QUERY RESULTS section of the window.

- 3. Select the Task(s) in the QUERY RESULTS section that you want to attach to a Task.
- 4. Select the type of relationship you want to assign between the Task and its attachment from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 5. Click **OK** to attach the Task(s) to the Task and close the current window. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Task displays as a Reference.
- 6. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 7. Click **SAVE** to save the attached Task as a Reference in the Project.

Attaching Releases

To attach a Release to a Task:

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

Release Name	
Select the Relationship that the selected Rele	ase has to Task 30286:
 Related to this Task - (Informational) - S 	elected Release is related to Task 30286

- 5. To select a Release for an attachment, enter the RELEASE NAME in the RELEASE NAME field or click the RELEASE NAME auto-complete list icon to locate and select the Release in a VALIDATE window. (Hold down Ctrl+Click or Shift+Click to select more than one Release.) The selected Release displays in the RELEASE NAME field. If you selected multiple Releases, they all display in the field separated by semi-colons.
- 6. Select the type of relationship you want to assign between the Task and its Reference from the list. See "*Dependency Relationships*" on page 145 for a description of the various relationships that can be assigned.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Release displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached Release as a Reference in the Project.

Attaching Documents

To attach a Document to a Task:

1. Open the TASK INFORMATION window.

- 2. Click the **REFERENCES** tab.
- 3. Select **ATTACHMENT** from the NEW REFERENCE drop down list.
- 4. Click ADD. The NEW REFERENCE ATTACHMENT window opens.

New Refere	nce - Attachment		×
Attachment			@ ===
Description:			
		OK	Cancel
Ready			

- 5. To select a Document for an attachment, click the FILE CHOOSER icon. Open the drive and directory where the file you want to attach is located and select it. The name of the Document displays in the ATTACHMENT field.
- 6. Enter a description in the DESCRIPTION field.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached Document displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached Document as a Reference in the Project.

Attaching URLs

To attach a URL to a Task:

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

New Reference - URL	×
URL:	U
Description:	
	OK Cancel
Ready	

- 5. Enter the name of the URL in the URL field.
- 6. Enter a description in the DESCRIPTION field.
- 7. Click **OK**. You return to the **REFERENCES** tab in the TASK INFORMATION window. The new attached URL displays as a Reference.
- 8. Click **OK** to close the TASK INFORMATION window. You return to the PROJECT window.
- 9. Click **SAVE** to save the attached URL as a Reference in the Project.

Dependency Relationships

The dependency relationships available when you attach References of various types to a Task are described in *Table 7-3*.

Relationship	Description
Adding Requests to Tasks	
FF Predecessor	The Task does not complete until the selected Request closes.
Predecessor	Action is not allowed on this Task until the selected Request closes.
Related to this Task	The selected Request is related to this Task.
Successor	No Action is allowed on the selected Request until this Task closes.
Task Updated by Request	This Task is automatically updated by the selected Request.

Table 7-3. Dependency Relationships

Relationship	Description	
Adding Packages to Tasks		
Related to this Task	The Referenced Package is related to this Task.	
Adding Projects to Tasks		
Related to this Task Referenced Project is related to this Task.		
Adding Releases to Tasks		
Related to this Task	Referenced Release is related to this Task.	
Adding Tasks to Tasks		
Related to this Task	The Referenced Task is related to this Task.	

Table 7-3. Dependency Relationships

Configuring Task Predecessors

Task predecessors are configured from the Project Plan Panel. A predecessor is a Task or Project that has a defined relationship between its start or finish date, and the start or finish dates of the Task that is dependent on it.

When Request References are attached to a Task, they can also act as predecessors for the dependency relationship you assign to them. For instance, if you assign a Predecessor relationship between a Task and a Request that has been attached to the Task as a Reference, action is not allowed on this Task until the Request closes.

See "*Attaching References to Tasks*" on page 133 for more information on how to assign relationships between Tasks and References.

See "*Dependency Relationships*" on page 145 for a list of the dependency relationships and their descriptions.

See "*Setting Up Project Dependencies*" on page 95 for more detailed information on setting Task and Project Predecessors.

Changing the Task State

There are two methods for changing a Task's state. A Task's state can be changed from inside the Project window, or in its Task Information window.

To change a Task's state from the Project window

- 1. States can be changed for existing Tasks and new Tasks.
 - If you are changing the state of an existing Task, query and open an existing Project.
 - If you are changing the state of a newly created Task, you are already in the Project Plan Panel.
- 2. In the Project Plan Panel, select a new state for the Task from the drop down list in the STATE column.

To change a Task's state from its Task Information window

- 1. States can be changed for existing Tasks and new Tasks.
 - If you are changing the state of an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task you want to edit, or select it and click EDIT. The TASK INFORMATION window opens.

• If you are changing the state of a new Task, you are already in the Project Plan Panel.

Double-click the Task that requires a state change, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. Select the new Task state from the TASK STATE drop down list at the top of the window.
- 3. Click OK.
- 4. Click **SAVE** to save the Task state changes.

Setting Scheduling Constraints

Scheduling constraints prevent certain changes to a schedule. If a Project Manager attempts to schedule a constrained Task outside of its constraint, Drive will alert the user to the conflict and reset the date to its previous value. Scheduling constraints are set in the TASK INFORMATION window.

To set a Task's scheduling constraints:

- 1. Scheduling constraints can be set for existing Tasks and new Tasks.
 - If you are setting scheduling constraints for an existing Task:
 - O Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.

Or

o Query and open an existing Project.

Double-click the Task for which you want to set scheduling constraints, or select it and click **EDIT**. The TASK INFORMATION window opens.

• If you are setting scheduling constraints for a newly created Task, you are already in the Project Plan Panel.

Double-click the Task for which you want to set scheduling constraints, or select it and click **EDIT**. The TASK INFORMATION window opens.

- 2. Click the **DETAILS** tab in the TASK INFORMATION window.
- 3. Under SCHEDULING CONSTRAINTS, select the type of constraint you want to use from the CONSTRAINT TYPE drop down list.
- 4. Enter a date in the CONSTRAINT DATE field.
- 5. Click **OK**.

Configuring User Data

User Data is the set of custom fields that can be defined for various Kintana Drive entities. User Data fields can be used to capture data not covered by the default Project/Task information fields, such as Cost. These fields are accessed through the **USER DATA** tab in the TASK INFORMATION window. If no User Data has been defined for a particular entity, the tab is disabled. For more information on configuring and using User Data, refer to the User Data chapter "Configuring a Request Resolution System" or "Configuring a Deployment System in Kintana".

Project/Task User Data Roll-Up

Values from Task User Data fields can be configured to "roll up" (combine/process values in a meaningful way) into parent Project User Data fields. The following types of Task User Data can roll up into Project User Data:

- Numeric fields (Text Field component type with Numeric data mask)
- Date fields

For each Project, a Project User Data field can show a roll-up of Task User Data values using one of the following methods:

- Average Shows the average of all values of a specified Task User Data field for every Task under the Project (Numeric fields).
- Maximum Shows the largest of all values of a specified Task User Data field for every Task under the Project (Numeric and Date fields).
- Minimum Shows the smallest of all values of a specified Task User Data field for every Task under the Project (Numeric and Date fields).
- Sum Shows the summation of all values of a specified Task User Data field for every Task under the Project (Numeric fields).

Project/Task User Data Roll-Up can be used to capture various important aspects of a Project.



Using the "Average" Roll-Up Method, the average cost of all a Project's Tasks can be easily determined and automatically recalculated each time a Task is updated.

Using the "Maximum" Roll-Up Method, the latest date out of a Project's Tasks can be captured.

Using the "Minimum" Roll-Up Method, the earliest date out of a Project's Tasks can be captured.

Using the "Sum" Roll-Up Method, the total cost of a Project's Tasks can be easily determined and automatically recalculated each time a Task is updated.

Creating Project/Task User Data Roll-Up

User Data must be configured for Projects and Tasks before specifying Roll-Up Methods.

- 1. Create and configure Project and Task User Data fields.
- 2. Link Project and Task User Data fields with Roll-Up Method.

For more detailed information on configuring User Data, see the User Data chapter in "Configuring a Request Resolution System" or "Configuring a Deployment System in Kintana".

Example: Using Project/Task User Data Roll-Up

Company X would like to capture total cost for its Projects. Total Project cost in this case is to be calculated by adding the costs of individual Tasks. User Data fields for Task cost and Project total cost are each defined. The relationship is illustrated below:



Each Task has its own Cost User Data field. The values for each Task Cost User Data field are rolled up using the "Sum" Roll-Up Method into the Project TOTAL COST User Data field.

	Task Name: Feasibility Analysis
	Task Natie. Freasuling Analysis
l	
lr	
Ta	sk Information: Prepare Testing Environments
	Task Name: Prepare Testing Environments
	Task Category: Task State: Pending Predecessor
ſ	Details Exceptions 🖅 Action Items 🖅 Notes 🖅 Notifications 📃 References User Data
Γ	Cost 20
Ta	sk Information: Phase One Testing
	Task Name: Phase One Testing
	Task Category: 📃 💽 Task State: New
	Details Exceptions E: Action Items E: Notes E: Notifications E: References User Data
	Cost 30
n	
Pro	pject Information: Install Lesting
Pro	opect Information: Install Lesting Project Name: Install Testing
Pro	Project Information: Install Lesting Project Name: Install Testing Project Manager: johnsmith Project State: Plan
Pro	Project Unformation: Install Testing Project Manager: [install Testing Project Manager: [install Testing Details]

Once Project and Task User Data fields have been configured and saved, the Roll-Up relationship can be specified.

To specify the Roll-Up Method:

1. In the Kintana Workbench, click the **CONFIGURATION** screen group and click the USER DATA screen. The USER DATA WORKBENCH opens.

🥑 Use	r Data Workbench	le contra de la cont	_ □
Results Query	Query: None User Data Type: ALL	Enabled: ALL	
	New User Data Context	Save Query Clear List	
	Ready		

- 2. Select **PROJECT USER DATA** from the USER DATA TYPE drop down list and click **LIST**. The **RESULTS** tab opens with the Project User Data Type loaded.
- 3. Select the Project User Data and click **OPEN**.
- 4. Click the **Roll-UP** tab.

🙋 User Data C	Context : Project User	Data		
User Data Type:	Project User Data			
Context Field:	[Con	text Value:	
Enabled:	• Yes • No		Scope: Global	
Meta Layer View:				
Fields Layout	Roll-Up			
A roll-up defines For example, a p	a computation on a task u project can have a Total (user data field for all tasks under a proj Cost field that displays the summation o	ect and displays the result in a f a Cost field for all tasks under	project user data field. that project.
Project	User Data Field	Task User Data Field	Roll-Up Method	Enabled
		New Edit Remo	ove	
			OK	Save Cancel
Ready				

5. Click **New**. The ADD NEW ROLL-UP window opens.

Add New Roll-Up	×
Enabled: 🖲 Yes	O No
Project User Data Field:	III
Task User Data Field:	II
Roll-Up Method:	•
	OK Cancel
Ready	

- 6. Select the PROJECT USER DATA FIELD that will contain rolled-up Task User Data values.
- 7. Select the TASK USER DATA FIELD whose values will roll up into the chosen PROJECT USER DATA FIELD.
- 8. Select the ROLL-UP METHOD from the drop down list.

The drop down list will only display valid options for the data types of the PROJECT and TASK USER DATA FIELDS.

- 9. Select **YES** to enable the Roll-Up.
- 10. Click **OK**.

The Roll-Up relationship is added to the **Roll-Up** tab.

11. Click SAVE.



Only two User Data fields of the same type can be selected for Roll-Up (for example, a Numeric field cannot roll up into a Date field, nor vice versa).

While a Task User Data field can have multiple Roll-Up relationships associated with it, a Project User Data field cannot have more than one Roll-Up relationship defined.

Editing Project/Task User Data Roll-Up

Project/Task User Data Roll-Up can be edited from the Kintana Workbench once it has been created.

To edit a Project/Task User Data Roll-Up relationship:

1. In the Kintana Workbench, click the **CONFIGURATION** screen group and click the USER DATA screen. The USER DATA WORKBENCH opens.

🥑 Use	r Data Workbench				
Results Query	Query: Nor User Data Type: ALL		Enabled: ALL		N N
	New User Data Cor	ntext	Save Que	ery Ciear	List
	Ready				

- 2. Select **PROJECT USER DATA** from the USER DATA TYPE drop down list and click **LIST**. The **RESULTS** tab opens with the Project User Data Type loaded.
- 3. Select the Project User Data and click **OPEN**.
- 4. Click the **Roll-Up** tab.

🙋 User Data C	Context : Project User	Data		
User Data Type:	Project User Data			
Context Field:	[Con	itext Value:	
Enabled:	• Yes • No		Scope: Global	
Meta Layer View:				
Fields Layout	Roll-Up			
A roll-up defines For example, a p	a computation on a task i project can have a Total (user data field for all tasks under a proj Cost field that displays the summation o	ect and displays the result in a if a Cost field for all tasks under	project user data field. r that project.
Project	User Data Field	Task User Data Field	Roll-Up Method	Enabled
Total Cost		Cost	Sum	Y
		New Edit Hemo	ove	
			OK	Save Cancel
Ready				

- 5. Select the Roll-Up relationship you wish to edit.
- 6. Click **EDIT**. The EDIT ROLL-UP window opens.

			dd New Roll-Up
	O No	Yes	Enabled:
II		Project Cost	Project User Data Field:
II		Cost	Task User Data Field:
		Sum	Roll-Up Method:
Cancel	OK		
C	ОК		2

- 7. Make any desired changes to the PROJECT/TASK USER DATA FIELD OR ROLL-UP METHOD.
- 8. Click OK.

The Roll-Up definition is updated in the **Roll-Up** tab.

9. Click SAVE.

Deleting Project/Task User Data Roll-Up

Project/Task User Data Roll-Up can be deleted. This deletion only removes the Roll-Up relationship; it does not delete the referenced User Data fields.

To delete a Project/Task User Data Roll-Up relationship:

1. In the Kintana Workbench, click the **CONFIGURATION** screen group and click the USER DATA screen. The USER DATA WORKBENCH opens.

🙋 Use	r Data Workbench			
Results Query	Query: None User Data Type: ALL	▼ Enabled: ALL		X
	New User Data Context	Save Query	Clear	List
	Ready			

2. Select **PROJECT USER DATA** from the USER DATA TYPE drop down list and click **LIST**. The **RESULTS** tab opens with the Project User Data Type loaded.

- 3. Select the Project User Data and click **OPEN**.
- 4. Click the **ROLL-UP** tab.

🙋 User Data C	Context : Project Use	r Data		
User Data Type:	Project User Data			
Context Field:	[Cor	itext Value:	
Enabled:	• Yes O No		Scope: Global	
Meta Layer View:				
Fields Layout	Roll-Up			
A roll-up defines For example, a p	a computation on a task (project can have a Total (user data field for all tasks under a proj Cost field that displays the summation o	ect and displays the result in a if a Cost field for all tasks under	project user data field. r that project.
Project	User Data Field	Task User Data Field	Roll-Up Method	Enabled
Total Cost		Cost	Sum	Y
,				
		New Edit Hem	ove	
			OK	Save Cancel
Ready				

- 5. Select the Roll-Up relationship you wish to remove.
- 6. Click Remove.
- 7. Click SAVE.

Example: Creating and Using Project/Task User Data Roll-Up

Company X wants to capture the total cost of any Project. This value will be calculated as the sum of all Task costs. They also want the calculated cost to be updated every time a Task cost is changed. They will accomplish this using Project/Task User Data Roll-Up.

To create Project/Task User Data Roll-Up that will calculate total Project cost:

1. In the Kintana Workbench, click the **CONFIGURATION** screen group and click the USER DATA screen. The USER DATA WORKBENCH opens.

🙋 Use	er Data Workbench				_1
Results Query	Query: None User Data Type: ALL	 Enabled: 🗚	LL		×
	New User Data Context	Save	luem	Clear	List
	New User Data Context	Save (Juery	Clear	List
	Ready				

- 2. Create the Project User Data field.
 - a. Select **PROJECT USER DATA** from the USER DATA TYPE drop down list.
 - b. Click LIST. The RESULTS tab opens with the Project User Data Type loaded.
 - c. Open the Project User Data Type.
 - d. Click **New** in the **FIELDS** tab. The FIELD: NEW window opens.
 - e. Fill in the following information:

Field	Value
FIELD PROMPT	Total Cost
TOKEN	(any useful token)
DESCRIPTION	(any useful description)
VALIDATION	Numeric Text Field
ENABLED	Yes
USER DATA COL	(any available User Data column)
DISPLAY ONLY	Never
DISPLAY	Yes
REQUIRED	Never
WORKBENCH ONLY	No

Field: Total Cost				X		
Field Prompt: Total Cost		Token: TOTAL_PROJEC	T_COST			
Product: All Products	7	Description: Captures total Project cost				
Validation Numeric Text Field		Component Type: Text Field		7		
	New Open	Enabled: 💿 Yes	C No			
Attributes Default Depende	ncies					
User Data Col.: USER_DAT	A1	Display Only: Never		•		
Display: 💽 Yes	C No	Required: Never		•		
Workbench Only: O Yes	No	Multi-Select Enabled: 🔿 Yes	🖲 No			
			JK Apply	Cancel		
Ready						

- f. Click **OK** in the FIELD: NEW window. Click **OK** in the PROJECT USER DATA window to save the new field.
- 3. Create the Task User Data field.
 - a. In the USER DATA WORKBENCH **QUERY** tab, select **TASK USER DATA** from the USER DATA TYPE drop down list.
 - b. Click LIST. The RESULTS tab opens with the Task User Data Type loaded.
 - c. Open the Task User Data Type.
 - d. Click **New** in the **FIELDS** tab. The FIELD: NEW window opens.
 - e. Fill in the following information:

Field	Value
FIELD PROMPT	Cost
Token	(any useful token)
DESCRIPTION	(any useful description)
VALIDATION	Numeric Text Field
ENABLED	Yes
USER DATA COL	(any available User Data column)
DISPLAY ONLY	Never
DISPLAY	Yes
Required	Never
WORKBENCH ONLY	No

Field: Cost				×
Field Prompt: Cost		Token: TASK_COST		
Product: All Products	2	Description: Used to calculate to	otal Project cost	
Validation Numeric Text Field		Component Type: Text Field		7
	New Open	Enabled: 💿 Yes	O No	
Attributes Default Depende	ncies			
User Data Col.: USER_DAT	41	Display Only: Never		•
Display: 💽 Yes	C No	Required: Never		-
Workbench Only: 🔿 Yes	No	Multi-Select Enabled: ${f O}$ Yes	🖲 No	
		ОК	Apply	Cancel
Ready				

- f. Click **OK** in the FIELD: NEW window. Click **OK** in the TASK USER DATA window to save the new field.
- 4. Create the Roll-Up relationship between the Task and Project User Data fields.
 - a. In the USER DATA WORKBENCH **QUERY** tab, select **PROJECT USER DATA** from the USER DATA TYPE drop down list.
 - b. Click LIST. The RESULTS tab opens with the Project User Data Type loaded.
 - c. Open the Project User Data Type.
 - d. Click the Roll-UP tab.

🙋 User Data C	Context : Project Use	r Data		
User Data Type:	Project User Data			
Context Field:		Cor	ntext Value:	
Enabled:	• Yes © No		Scope: Global	
Meta Layer View:				
Fields Layout	Roll-Up			
A roll-up defines For example, a p	a computation on a task project can have a Total	user data field for all tasks under a proj Cost field that displays the summation o	ject and displays the result in a of a Cost field for all tasks unde	project user data field. Ir that project.
Project	User Data Field	Task User Data Field	Roll-Up Method	Enabled
		New Edit Rem	ove	
			ОК	Save Cancel
Ready				

e. Click **New**. The ADD NEW ROLL-UP window opens.

Add New Roll-Up	X
Enabled: 💿 Yes	C No
Project User Data Field:	H
Task User Data Field:	H
Roll-Up Method:	
p	
Pandu	
Ineady	

- f. Select the TOTAL COST Project User Data Field that will contain the rolled-up COST Task User Data cost values.
- g. Select the Cost Task User Data field whose values will roll up into the TOTAL COST Project User Data field.
- h. Select **SUM** from the ROLL-UP METHOD drop down list.
- i. Click **OK**.

The Roll-Up relationship is added to the **Roll-Up** tab.

j. Click SAVE.

🥑 User Data Context : Project Use	r Data	
User Data Type: Project User Data		
Context Field:	Con	itext Value:
Enabled: 💿 Yes 🔿 No		Scope: Global
Meta Laver View:		
Gielde Lawred Bollello		
A roll-up defines a computation on a task	user data field for all tasks under a projr	ect and displays the result in a project user data field.
For example, a project can have a Total	Cost field that displays the summation o	f a Cost field for all tasks under that project.
Project User Data Field	Task User Data Field	Roll-Up Method Enabled
Total Cost	Lost	Sum Y
1		
	New Edit Remo	we
		OK Save Cancel
		OK Ource Cancer

To use the Roll-Up relationship, no further configuration is necessary. The rolled-up fields are accessible from the User Data tab of the respective Project or Task.

Each Task has its own Cost User Data field. The values for each Task Cost User Data field are rolled up using the "Sum" Roll-Up Method into the Project TOTAL COST User Data field.

	sk Information: Feasibility Analysis
	Task Name: Feasibility Analysis
	Task Category: Task State: Ready
J	Details Exceptions El Action Items El Notes El Notifications El References User Data
	Cost [10
٢a	sk Information: Prepare Testing Environments
	Task Name: Prepare Testing Environments
	Task Category: Task State: Pending Predecessor
ſ	Details Exceptions 📋 Action Items 🖃 Notes 🖻 Notifications 📑 References User Data
	Cost 20
ſa	sk Information: Phase One Testing
	Task Name: Phase One Testing
	Task Category: Task State: New
ſ	Netails Exceptions E Action Items E Notes E Notifications E References User Data
	Details Exceptions E Action Items E Notes E Notifications E References User Data Cost 30
	Details Exceptions E. Action Items E. Notes E. Notifications E. References User Data Cost 30
	Details Exceptions E Action Items E Notes E Notifications E References User Data
Pro	Details Exceptions E Action Items E Notes E Notifications E References User Data
Pro	Details Exceptions E Action Items Notes Notifications E References User Data Cost 30 ject Information: Install Testing Project Name: Install Testing
l Pro	Details Exceptions E Action Items Notes Notifications E References User Data Cost 30 ject Information: Install Testing Project Name: Install Testing Project Manager: johnsmith Project State: Plan
	Details Exceptions E Action Items Notes Notifications E References User Data Cost 30 ject Information: Install Testing Project Name: Install Testing Project Name: johnsmith Project State: Plan tetails E Action Items E References User Data

Chapter 8 Using Project Templates

Project Templates are used in Kintana Drive to create repeatable processes to be used in Projects. They can be used as a model and serve as a basis for numerous Master Projects. Templates can also be created and then imported as a Subproject into a Master Project.

Project Templates speed up the process of setting up your Projects. A repeated set of Tasks are bundled into a Template and dropped into any Project while preserving its notifications, project plan, and any custom fields the template may have.

Example

A company with several different software products might use the same process for all development efforts. A Project Template could be used to create the Master Project for each one, as opposed to creating them all individually every time a project is planned. Information for each individual Project can then be modified by a particular Project Manager as needed.

The following sections discuss:

- Setting up a Project Template
- Creating a Project Template from an Existing Project
- Creating a Master Project from a Project Template
- Creating a Subproject from a Template

Setting up a Project Template

Project Templates consist of three parts:

• Project Plan - an ordered list of Tasks

The sequence of Tasks is identical in form and function to the Project Plan Panel.

• Any custom fields created by the user

Configurable custom fields define and collect any necessary information that is not already covered by standard Task or Project detail fields.

• Project Template settings

Settings for a Project Template work the same way as settings for a Master Project.

The following sections provide instructions for creating and configuring Project Templates:

- Adding Tasks to a Project Template
- Creating Custom Fields for Project Templates
- Configuring Tasks in a Project Template
- Configuring Settings for a Project Template
- Setting Ownership for a Project Template
- Creating a Master Project from a Project Template
- Creating a Subproject from a Template

🙋 Project Template : Ur	ntitled1				_ 🗆 ×
Template Name:		E	Enabled: 💿 Yes	C No	
Template Owner:		🔢 Dep	artment:		•
Description:					
Settings Custom Fields Ownership Used By	Edit Master Project Settin Edit Custom Fields for Pi Edit Ownership settings View Projects that use th	ngs rojects created fr for this Project Te is Project Templa	om this Template emplate. ate.	,	
Seq 🖂	Name	Task Category	Sched Duration (days)	Sched Effort (hours)	Predecessor
1 New Pro	ject			8.0	
4				J	
↑↓ ← → Edit	Delete 🕂 🖬	- All			
Task	Add			OK Save	Cancel

Figure 8-1 Project Template Window

Adding Tasks to a Project Template

The process of adding Tasks to a Project Template is identical to adding Tasks in the Project Plan Panel. See "*Adding Tasks to the Project Plan Panel*" on page 85 for details.



Project Templates do not contain References, Action Items, or Notes, and some fields are not updateable.

Creating Custom Fields for Project Templates

Project Managers can create custom fields that collect information not covered by Project or Task detail fields. Custom fields are unique to each Template. Custom fields are added and modified by:

- Defining Custom Fields for Project Templates
- Modifying the Layout of Custom Fields

Defining Custom Fields for Project Templates

To add a custom field to a Project Template:

- 1. Click the **DRIVE** screen group and click the PROJECT TEMPLATES screen. The PROJECT TEMPLATE WORKBENCH opens.
- 2. Open an existing Template by searching for and double-clicking the Template, or create a new Template by clicking **New**. The PROJECT TEMPLATE window opens.
- 3. Click **CUSTOM FIELDS**. The CUSTOM FIELDS FOR PROJECT TEMPLATE window opens.

Custom Fields	s for Projec	ct Template				×
Fields Layo	ut					
Prompt	Token	Enabled	Component Type	Validation	Display Only	Workbench Only
						>
			New Edit	Remove		
					OK	Apply Cancel
Ready						

4. Click **New.** The FIELD: New window opens.

🌺 Field: Ne w	×
Field Prompt:	Token:
Description:	
Enabled: 🖲 Yes 🛛 🔿 No	
Validation 🔠	Component Type: None
New Open	Muttiselect: O Yes C No
Attributes Default Dependencies Security	
Section Name: Section # 1	Parameter Col.: PARAMETER1
Transaction History: 🔿 Yes 🛛 💿 No	Display Only: Never
Notes History: 🔿 Yes 🛛 💿 No	Required: Never
Workbench Only: 🔘 Yes 💿 No	
Copy From	OK Add Cancel
Ready	

5. Fill in all necessary information. Fields in red are required.

The FIELD: NEW window consists of five main areas: a general information region, the **ATTRIBUTES** tab, the **DEFAULT** tab, the **DEPENDENCIES** tab, and the **SECURITY** tab. See "*Drive Workbench Reference*" for the definitions of each field.

• The ATTRIBUTES tab defines the basic properties of a field.

- The **DEFAULT** tab sets the defaults for a field, as well as specifying conditions for a default setting's appearance.
- The **DEPENDENCIES** tab sets behavioral relationships between fields. They can be configured for a variety of situations. For example, a Custom Field in a Project Template could be set to become required when another field value in the Template is set to **APPROVED**.
- The **SECURITY** tab sets visibility and editability properties for the field according to user or Security Group.
- 6. Click **ADD** to save the configuration for this custom field and create additional custom fields, or click **OK** to save the configuration for this custom field and close the FIELD: NEW window.

Setting Visibility at the Field Level

By default, all fields are set to be visible to all users and editable by all users. Field visibility and editability can be controlled from the FIELD window's **SECURITY** tab using the EDIT FIELD SECURITY window. To configure field visibility from the FIELD window:

- 1. Open the desired Project Template and click **CUSTOM FIELDS** to open the CUSTOM FIELDS FOR PROJECT TEMPLATE window.
- 2. Select the desired field and click **EDIT**. The FIELD window opens. Click the **SECURITY** tab.

🌺 Field: Ne w			×
Field Prompt:	Token:		
Description:			
Enabled: • Yes C No			
Validation	Component Type: None		7
New Open	Multiselect: 💿 Yes	C No	
Attributes Default Dependencies Security			
Visible To: All users			
Editable By: All users			
	Edit		
Copy From		OK Add	Cancel

3. Click **EDIT**. The EDIT FIELD SECURITY window opens.

🏀 Edit Field Security: New				×		
Set default security for this field.						
Note: Security may still be affected by Status Dependencies, Field Level Dependencies, etc.						
This field is: 🔽 Visible to all users						
Editable by all users						
Select Users/Security Groups that can	This field is visible to these Users	s/Security Groups:	1.11-11-1	F-19-1-1-		
view this field:	Security Type	Security	VISIble	Ealtable		
Security Group						
Security Group						
Security Error Requirity Group Name						
-						
Provide Editing Rights						
Tokens Add: 🔿)	Remove	1			
J		- Normerve				
				OK Cancel		
Ready						

- 4. Uncheck the VISIBLE TO ALL users box to begin fine-tuning field properties.
- 5. Make a choice from the Select Users/Security Groups that can view this FIELD drop down list. You can select a User, Security Group, Standard Token, or User Defined Token.

🌺 Edit Field Security: New				X
Set default security for this field.				
Note: Security may still be affected by Status Dependencies, Field Level Dependencies, etc.				
This field is: 🔲 Visible to all users				
Editable by all users				
Select Lleave Coourity Crouns that con	This field is visible to these Users	Security Groups:		
view this field	Security Type	Security	Visible	Editable
Requirity Group				
Requite Croup	1			
User				
Standard Token ty Group Name				
User Defined Token				
Provide Editing Rights				
Tokens Add: 🔿	,		1	
<u> </u>	1	Nemove		
				OK Cancel
Ready				

6. Once you have made your choice from the drop down list, select the User, Security Group, or Token from the auto-complete list.

If you wish to assign the selected User, Security Group, or Token editing rights as well as viewing rights to the field, check the PROVIDE EDITING RIGHTS box.

7. Click the ADD arrow button to add the selected User, Security Group, or Token to the THIS FIELD IS VISIBLE TO THESE USERS/SECURITY GROUPS area.
| 🌺 Edit Field Security: New | | | | × |
|--|----------------------------------|-----------------------|---------|-----------|
| Set default security for this field.
Note: Security may still be affected by Status Dependencie
This field is: Visible to all users Editable by all users | s, Field Level Dependencies, | etc. | | |
| Select Users/Security Groups that can | This field is visible to these U | Jsers/Security Groups | c | |
| view this field: | Security Type | Security | Visible | Editable |
| Security Group | Security Group Name | Kintana User Ad | N | N N |
| Security Group: | | | | |
| | | Remove | | |
| | | | | OK Cancel |
| Ready | | | | |

If you change your mind about granting the selected User, Security Group, or Token editing rights, you can uncheck the box in the EDITABLE column of the THIS FIELD IS VISIBLE TO THESE USERS/SECURITY GROUPS area. The field will then be visible but not editable to the selected User, Security Group, or Token. To remove viewing rights entirely, select the User, Security Group, or Token and click **REMOVE**.

8. When you are finished adding Users, Security Groups, or Tokens to the THIS FIELD IS VISIBLE TO THESE USERS/SECURITY GROUPS area, click **OK** to save changes and return to the **SECURITY** tab. The **SECURITY** tab is updated with the list of Users, Security Groups, or Tokens with viewing or editing rights to the field.

🌺 Field: Ne w				×
Field Prompt:	Token:			
Description:				
Enabled: 💿 Yes 🛛 🔿 No				
Validation	Component Type: None			7
New Open	Multiselect: 💿 Yes		O No	
Attributes Default Dependencies Security				
Visible To: Kintana User Admin				
Editable By: Kintana User Admin				
	Edit			
Copy From		ОK	Add	Cancel

Modifying the Layout of Custom Fields

You can modify the graphical representation and placement of the custom fields in the Project Template. These changes are made in the LAYOUT tab in the CUSTOM FIELDS FOR PROJECT TEMPLATE window.

Custom Fields for Project Templa	ate		X
Fields Layout			
Sections:	Selected Section Layou	t	
1 Tab # 1	Column 1	Column 2	Column 3
♥			
New Rename Remove	↑ ↓ ← → Width 1	🔻 Height	Move To>
		ОК	Apply Cancel
Ready			

Figure 8-2 Custom Fields for Project Template Layout Tab

Field layout can be modified in the following ways:

- Modifying Custom Field Widths
- Moving Fields
- Adding Sections
- Previewing Layouts

Modifying Custom Field Widths

To change the column width of a Project Template's custom field:

- 1. Click the **DRIVE** screen group and click the PROJECT TEMPLATES screen. The PROJECT TEMPLATE WORKBENCH opens.
- 2. Query for and open the Project Template that you would like to modify. The PROJECT TEMPLATE window opens.
- 3. Click **CUSTOM FIELDS** to open the CUSTOM FIELDS FOR PROJECT TEMPLATE window.

- 4. Click the LAYOUT tab.
- 5. Select the custom field.
- 6. Select either the 1, 2, or 3 choice in the WIDTH drop down list.



The Layout editor will not allow changes to be made if the change conflicts with another field in the layout. For example, a field's width cannot be changed from one to two if another field exists in column two on the same row

For custom fields of component type **TEXT AREA**, the number of lines the text area displays can be specified. Select the field in the **LAYOUT** tab and change the value in the COMPONENT LINES attribute. If the selected custom field is not of the type **TEXT AREA**, this attribute will be blank and non-updateable.

Moving Fields

To move a custom field or set of custom fields:

- 1. Click the **DRIVE** screen group and click the PROJECT TEMPLATES screen. The PROJECT TEMPLATE WORKBENCH opens.
- 2. Query for and open the Project Template that you would like to modify. The PROJECT TEMPLATE window opens.
- 3. Click **CUSTOM FIELDS** to open the CUSTOM FIELDS FOR PROJECT TEMPLATE window.
- 4. Click the LAYOUT tab.
- 5. Select the custom field(s). To select more than one custom field, press the Shift key while selecting the last custom field in a set. Only a group of adjacent fields can be selected.
- 6. Use the directional arrow buttons to move the custom fields to the desired location.



Custom fields cannot be moved to an area where other fields already exist. The other fields must be moved out of the way first.

Adding Sections

To add a section to a Project Template:

- 1. Click the **DRIVE** screen group and click the PROJECT TEMPLATES screen. The PROJECT TEMPLATE WORKBENCH opens.
- 2. Query for and open the Project Template that you would like to modify. The PROJECT TEMPLATE window opens.
- 3. Click **CUSTOM FIELDS** to open the CUSTOM FIELDS FOR PROJECT TEMPLATE window.
- 4. Click the LAYOUT tab.
- 5. Click **New** in the SECTIONS frame. The INPUT dialog opens.
- 6. Enter a Section NAME.
- 7. Click **OK**. The name of the new section appears in the **LAYOUT** tab.

When Project Templates are used to create a Master Project, the sections with the appropriate custom fields are displayed. To change a section name, click on a field that resides in that section and click **RENAME** to enter a new value in the INPUT dialog. The change is reflected immediately.

Previewing Layouts

Click **PREVIEW** to view the layout. This opens a small window that shows the fields as they will appear.

Remember that:

- If all of the custom fields have a width of one column, all displayed columns will automatically span the entire available area when the Template is displayed.
- Any rows with no custom fields are ignored. They do not show up as a blank line.
- Any non-displayed custom fields do not affect the layout. The layout engine considers them the same as blank fields.

Adding Fields to Existing Projects

Custom fields can be imported into an existing Project at any time without simultaneously importing the Project Template they come from. This allows

you to capture whatever information is needed without having to deal with a superfluous set of Projects or Tasks. Custom fields appear in the PROJECT or TASK INFORMATION window on their own tab.

For information on adding custom fields to existing Projects, see "*Importing Custom Fields from a Project Template*" on page 83.

Configuring Tasks in a Project Template

Tasks and notifications in a Project Template can be configured the same way as they are in the Project Plan Panel. See *"Editing Task Information"* on page 121 for details.



Project Templates do not contain References, Action Items, or Notes, and some fields are not updateable.

Configuring Settings for a Project Template

Project Templates contain settings identical to the settings for a Master Project. The process of configuring these settings is also identical. From the Project Template window, you can access the Settings for Project Template window where you can configure the following:

- Project Fields
- Exception Rules
- Indicators
- Scheduling
- Security
- Project Teams
- Cost Management

Project Te	am	Cost Management		Resource Ma	nageme	nt	Time N	lanagement
Project	Fields	Exception Rules		Indicator	's	Sch	eduling	Security
This tab configures the Project fields that can be displayed in the "Plan" tab of the Project window, and also the Project and Task detail pages and My Task portlet in the standard Kintana interface. Changing the field configuration here does not change the display in the other tabs of the Project Window.								
lanning Fields				CActivity Fields				
	Workbench				Workben	ich		
Enabled	Only	Fields		Enabled	Only	Fields		
	Г	Department				% Cor	nplete	
		Description			Г	Actua	I Duration	
Г	Г	Last Update Date			Γ	Actua	l Effort	
	Г	Priority			Г	Actua	l Finish Date	
_		Project/Teck #			Г	Actua	l Start Date	
_		Pageurea Creum			Г	Confid	lence	
_						Estima	ted Finish Date	
_		Scheduled Effort			Г	Estima	ited Remaining E	Juration
		Task Category				Estima	ted Remaining E	ffort
	Г	Planned Labor			Г	Actua	l Labor	
Γ		Planned Non-Labor			Г	Actua	I Non-Labor	
Г	Γ	Planned Total			Г	Actua	l Total	
						Г	AL 0.0	

See "*Setting Up a Master Project*" on page 59 for detailed instructions on configuring the Project Template settings.



If a Master Project is created from a Project Template, that Master Project will have all of the Template's settings.

However, if a Project Template is used to create a Subproject inside a Master Project, then that Template's settings will be overridden by the current Master Project's settings.

Setting Ownership for a Project Template

Different groups of Kintana users can have exclusive control over the Project Templates used by their group. These groups are referred to as Ownership Groups. Members of the ownership group are the only users who can edit, delete or copy the Project Template. Each Project Template can be assigned multiple ownership groups.

Ownership groups are defined in the Security Group window in the Kintana Workbench. Refer to the Kintana System Administration Guide for instructions on setting up Security Groups.

To set the Ownership for a Project Template:

1. Click the **DRIVE** screen group and click the PROJECT TEMPLATES screen. The PROJECT TEMPLATE WORKBENCH opens.

🙋 Project Template : Ur	ntitled1				_ 🗆 ×
Template Name:			Enabled: 💿 Yes	C No	
Template Owner:		🗄 Dep	artment:		•
Description:					
Settings Custom Fields Ownership	Edit Master Project Settin Edit Custom Fields for Pr Edit Ownership settings	igs rojects created fr for this Project Ti	om this Template emplate.		
Used By	View Projects that use thi	is Project Templ	ate.		
Seq 🖂	Name	Task Category	Sched Duration (days)	Sched Effort (hours)	Predecessor
1 New Pro	ject			8.0	
4					×
↑ ↓ ♦ ■ Edit	Delete 🕂 All 🖻	= All			
Task Ready	Add			OK Save	Cancel

2. Click the **Ownership** button. The Ownership window opens.

Ownership	×
Give ability to edit this Project Template to: All users with the Edit Project Templates Access Gran	t
\odot Only groups listed below that have the Edit Project Te	mplates Access Grant
Security Group	Description
Add	Remove
	OK Apply Cancel
Ready	

- 3. Select the ONLY GROUPS LISTED BELOW THAT HAVE THE EDIT PROJECT TEMPLATES ACCESS GRANT Option.
- 4. Click ADD. The ADD SECURITY GROUPS window opens.

Ownership Give ability to edit this Project Template to:	×
 Only groups listed below that have the Edit Project Tem 	plates Access Grant
Security Group	Description ,
Add Security Group	OK Add Cancel
Add R	emove OK Apply Cancel

- 5. Click the SECURITY GROUP auto-complete icon to add Security Groups to this Ownership Group.
- 6. Select a Security Group in the VALIDATE window and click **OK**. The name of the Security Group you selected is displayed in the SECURITY GROUP field.
- 7. Click **OK** to close the ADD SECURITY GROUP window.

Ownership	×
Give ability to edit this Project Template to:	
All users with the Edit Project Templates Acc Only groups listed below that have the Edit P	less birant Project Tomolates Access Grant
Security Group	Description
AM - Drive ALL	
Kintana Drive Project Manager	Configuration Manager for Kintana Drive
Ad	d Remove
	OK Apply Cancel
Ready	

8. Click **OK**. The Security Groups are added to the Ownership Group and the OWNERSHIP window closes.

Now only members of the Security Group(s) specified in the OWNERSHIP window can edit, delete or copy this Project Template.



If no Ownership groups are associated with the entity, the entity is considered global and any user with the Edit Access Grant for the entity can edit, copy or delete it. Refer to *"Kintana Security Model"* for more information on Kintana Access Grants.

Kintana administrators have the OWNERSHIP OVERRIDE access grant and can access configuration entities even if the administrator is not a member of one of the Ownership Groups and does not have the EDIT Access Grant.

If a Security Group is disabled or loses the EDIT Access Grant, that group will no longer be included in the ownership group.

Creating a Project Template from an Existing Project

Project Managers can create a new Project Template from an existing Kintana Drive Project. Project Managers who want to convert their Microsoft Projects into Drive Project Templates can first import their Microsoft Project into a Drive Project and then convert it into a template. See "*Integrating Kintana Drive with Microsoft Project*" on page 269 for detailed instructions on converting a Microsoft Project into a Kintana Drive Project.

To create a Project Template from an existing Kintana Drive Project:

- 1. Click the **DRIVE** screen group and click the **PROJECT** screen. The **PROJECT** WORKBENCH opens.
- 2. Locate and open the Project that you would like to convert to a Project Template.
- 3. Select **PROJECT -> CONVERT PROJECT TO TEMPLATE** from the menu. The CONVERT PROJECT TO TEMPLATE window opens.



In order to successfully convert a Project to a Template, you must be the only user editing the Project. If other Kintana users are editing the Project, a message will appear stating that the "Project is being edited by another user" and the conversion stops.

Convert Project To Template	×
Project Name: Implementation Lifecycle	
Template Name: Template of Implementation Lifecycle	
Template Owner: johnsmith	
Description:	
_Include	
Project Setup	
Custom Fields	
Votifications	
Resource Groups	
Convert	Cancel
Ready	

- 4. Enter a new TEMPLATE NAME, TEMPLATE OWNER and DESCRIPTION for the new Project Template.
- 5. Select whether to include PROJECT SETUP, CUSTOM FIELDS, NOTIFICATIONS and RESOURCE GROUPS by checking the associated box. See *Project to Template Conversion Details* for a list of items copied from the Project to the Template.
- 6. Click **CONVERT**. When the conversion is complete, a message window opens.

Questio	n X
٩	Would you like to edit Project Template Template of Implementation Lifecycle?
	Yes No

7. Click **YES** to edit the new Project Template.



In the Project to Template conversion, not all Project details are copied to the new Template. The Project actuals information is discarded during the conversion, such as the actual duration, efforts, start date and end date of the Project and Tasks. The resource, Task notes and all References in the Project are also discarded because the Project Template cannot represent these data.

Project to Template Conversion Details

The following items are copied or created in the Kintana Drive Project Template when converted from an existing Project.

Table 8-1. Items Copied or Created During the Project to Template Conversion

Item in Project Template	Description
The new Template Name	Provided by the user.
Enabled	Initially set to not enabled.
Template Owner	Set to the username of the Kintana user performing the conversion
Description	Provided by the user.
Default Project Settings	Uses the standard default or copies the settings from the Project, depending on the choice the user makes. Project settings include all of following:
	 Project fields (Planning fields and activity fields)
	Exception rules
	Indicators
	Scheduling settings
	Security settings
Custom Fields and Layout	The user can select to copy custom fields and their layout. For custom fields defined at the Master Project level, the field definitions are copied into the new Template. For custom fields defined at the Subproject level, only the references to the source Projects are copied.
Notifications	Optional setting in the 'Convert Project To Template' window.
Project Hierarchy	Copied based on the Project.

Item in Project Template	Description
Project Info	Project Name: copied
	 Project Manager: set to blank
	 Project State: clear to default value
	Department: copied
	 Template: converted (blank for Master Projects)
	Project Path: converted
	Description: copied
	Priority: copied
	% Complete: set to 0
	Confidence: set to blank
	Predecessors: converted
	Start Date/Actual: set to blank
	 Finish Date/Estimate: set to blank
	 Finish Date/Actual: set to blank
	Duration/Scheduled: copied
	 Duration/Est. Remaining: set to blank
	Duration/Actual: set to blank
	Effort/Scheduled: copied
	Effort/Est. Remaining: set to blank
	Effort/Actual: set to blank

Table 8-1. Items Copied or Created During the Project to Template Conversion

Item in Project Template	Description
Task Info	Task Name: copied
	Task Category: copied
	Task State: cleared to default value
	Department: copied
	Template: copied
	Project Path: converted
	Resource: set to blank
	Resource group: copied
	Description: copied
	Priority: copied
	% Complete: set to 0
	Confidence: set to blank
	Predecessors: converted
	Start Date/Actual: set to blank
	Date/Estimate: set to blank
	Finish Date/Actual: set to blank
	Duration/Scheduled: copied
	 Duration/Est. Remaining: set to blank
	Duration/Actual: set to blank
	Effort/Scheduled: copied
	Effort/Est. Remaining: set to blank
	Effort/Actual: set to blank
	 Scheduling Constraint: all constraints are removed

Table 8-1. Items Copied or Created During the Project to Template Conversion



Task Notes and all References are dropped, since the Project Template cannot represent this data.

Creating a Master Project from a Project Template

If a company has a business process that is used repeatedly, it will be easier to create and manage if it has its own Template containing preconfigured settings.

To create a new Master Project from a Project Template:

- 1. Click the **DRIVE** screen group and click the **PROJECT** screen. The **PROJECT** WORKBENCH opens.
- 2. Click New Project.

New Project		2
Master Project Name Project Manager: Project Template:	: _iohnsmith	
Readv	OK	Cancel

- 3. Enter a Master Project name in the MASTER PROJECT NAME field.
- 4. Select the desired Template from the PROJECT TEMPLATE auto-complete list.
- 5. Click **OK**.

A new Master Project is created, including the Project Plan, all of the fields to be collected, Indicators, Exception Rules, Custom Fields, Notifications, Cost Management and scheduling parameters defined in the Project Template.

Creating a Subproject from a Template

Project Templates can be used to add Subprojects to a Master Project, adding Tasks in a predefined order and hierarchy. The new Subprojects added will include notifications, custom fields, and default values for Scheduled Effort and Duration.

To add a set of Tasks to a Project using a Project Template:

- 1. Open the PROJECT window for the Project that you would like to change.
- 2. Select **Project Created FROM TEMPLATE** from the drop down list.

🥑 Proj	iect : I	Development Laj	otop Upgrade								_ 🗆 ×
PI	an	Cost E	V Analysis Baselines				Gan	t Chart:	22	80	isplay Options
Sea		Predecessors	Name		June	2003					
364	•				09	10	11	12	13	14	15
1			Development Laptop Upgra	ade Activ							
2			Initial Assessment	Activ							
6		5	Purchase New Laptor	os Penc							
7		2	Upgrade Laptops	Activ	L						
11		10	Roll-Out	Penc	L						
12		11	Lessons Learned	Penc							
	•				┛						Þ
^	-	⇒ Edit	Delete 🕂 🛋						Refresh	Sche	edule Project
Projec	t Crea	ated From Templ	ate 💌 Add						ок	Bave	Cancel
Ready											

3. Click ADD. The ADD PROJECT TEMPLATE window opens.

dd Project Template 🔀					
Project Template:					
OK Add	Cancel				
Ready					

4. Select a PROJECT TEMPLATE from the auto-complete list and click **OK**.

The selected Template is added to the Project Plan as a collapsed Subproject. If the Subproject is not in the place you want it to be, you can move it with the arrows in the Project Plan Panel (See "*Setting Up Project Hierarchy*" on page 87 for more details).

- 5. Modify the information in any Task inside the Subproject by doubleclicking on it. The TASK INFORMATION window for that Task opens.
- 6. Edit the information.
- 7. Click **OK** to save the information and close the TASK INFORMATION window, or click **SAVE** to save the changes without closing the window.

Chapter O Managing a Project

Business initiatives can be divided into a set of goals that must be met through the completion of measurable tasks by an assigned group of people. The tasks must be monitored to determine if they are on schedule. In order to provide organization and structure for these activities, a Project Manager is responsible for managing the work group and Project.

Some common responsibilities for Project Managers include:

- Organizing and assigning Tasks.
- Tracking Task and Project progress, and ensuring that assigned Tasks are completed on time.
- Communicating Project status to participants and stakeholders, including the appropriate escalation of Project-related issues.

Project Managers can integrate and streamline these responsibilities using the features of Kintana Drive. The following sections provide instructions for performing common Project Management tasks, such as setting up a Project and tracking its status.

Note

In Kintana Drive, Project Managers are those users who have Power licenses and specific Project Manager access grants. See the *"Kintana Security Model"* for details.

This chapter discusses:

• Setting Up a Project

Every Master Project contains a set of options to configure that are specific to the Project, such as what information is tracked and displayed, the rules for the display of indicators and exceptions, scheduling, and who can view Tasks and Projects.

• Adding Tasks to a Project

After the global options have been configured for a Master Project, Tasks and Subprojects can be arranged and ordered into a meaningful hierarchy.

• Taking a Baseline

Project Managers can take a baseline of their Projects, which can be used to monitor a Project plan's changes as it moves through its life cycle.

• *Revising the Project*

Project Managers can move their Projects into different Project "states." These states help Managers to maintain visibility and control over a Project.

• Updating the Schedule

After making revisions, a Project Manager may find it necessary to reschedule the Project. This includes recalculating Start and Finish dates.

• Viewing Project and Task Progress

Managers can search for Projects and Tasks, as well as track a particular Project's progress using its Summary Condition. Any exceptions that have been triggered can also be displayed.

• Analyzing Project Costs

Project Cost data can be collected and analyzed by the Project Manager to track budgets, compare Project sizes, or spot potential trouble.

• Tracking Project History

Project history is maintained and can be viewed for Projects and Tasks.

• Creating a URL to Open the Project Window

Project Managers and can construct a URL that opens their Kintana Drive Project in the Kintana Workbench.

• Printing a Project Gantt Chart

Project Managers can print the Project Gantt chart, with a wide range of filtering options. The Project Gantt chart can also be exported to an image file and used in presentations.



When a user creates or edits a Project or Subproject, that user is the only one able to save changes.

In the case of two users wishing to edit two different Subprojects under one Master Project, opening and editing only the desired Subprojects will enable each user to save changes without interfering with each other.

See "Concurrent Editing" on page 195 for more detailed information.



When you import a large Microsoft Project (or a large number of projects) into Kintana, tables in the Kintana database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Kintana Database. Instructions for this are included in the Kintana System Administration Guide. Contact your System Administrator for help with this procedure.

Setting Up a Project

Kintana Drive's Master Project entity is made up of the following components:

- Tasks
- Subprojects
- Activities
- Notes
- Packages
- Requests
- References

These components are used to define and process a specific business initiative. The Master Project also contains a number of global settings that can be configured to suit a particular Project's objectives. See the following sections for more information on setting up a Project:

- "Selecting Information to Track and Display" on page 61
- "Setting Up Exception Behavior" on page 62
- "Setting Up Indicators" on page 67

- "Setting Scheduling Options" on page 68
- "Setting Security Restrictions" on page 74
- "Setting Up the Project Team" on page 77
- "Setting Up Microsoft Project Integration" on page 80
- "Configuring Cost in the Project Settings Window" on page 43
- "Establishing a Project Baseline" on page 106

Adding Tasks to a Project

Once the Master Project has been configured, the Project Manager can add Tasks to the Project and specify Task details, including assigning resources or resource groups. Tasks can be added individually or in a pre-sequenced group with a Project Template. Tasks can also be organized in a hierarchical fashion quickly and easily.



See the following chapters for more details on including Tasks in a Project:

- *"Setting Up a Project"* on page 57
- "Creating a Task From a Request" on page 91
- "Configuring Tasks" on page 113
- "Using Project Templates" on page 163
- "Entering Actual Cost Data" on page 46

Taking a Baseline

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

See *"Establishing a Project Baseline"* on page 106 for more detailed information about taking and using Project baselines.

Revising the Project

Project plans rarely remain unchanged during a Project's life. Revisions are commonly made to accommodate Project updates, reorganizations and reassignments. Kintana Drive enables Project Managers to revise their plan quickly. This section discusses the following aspects of revising a Project:

- Viewing and Modifying Project Hierarchy
- Project States
- Updating Scheduling and Dependencies
- Concurrent Editing



When a user creates or edits a Project or Subproject, that user is the only one able to save changes. All other users will be warned of this before attempting to edit a Project or Subproject that is already open.

In the case of two users wishing to edit two different Subprojects under one Master Project, opening and editing only the desired Subprojects from the Project Workbench will enable each user to save changes without interfering with each other.

Viewing and Modifying Project Hierarchy

The ordering and grouping of Tasks and Subprojects is graphically displayed in the Project Plan Panel.

🥥 Proj	ect :	Development Laptop Upgrade				_ 🗆 🗙
PI	an	Cost EV Analysis Baselin	86		Gantt Ch	art: 🔉 🔍 🔐 Display Options
Seq	1	Name	State	R	2003 May Jun	Jul
1		Development Laptop Upgrade	Active	johr		
2		-Initial Assessment	Active	johr		1
3		Determine Laptop Usage	Completed	johr	johnsmith	
4		Technology Assessment	Completed	jane	janesmith;jakesmith;johnsmith	
5		Cost Analysis	In Progress	julie	L → Management of the second se	iesmith;josesmith;johnsmith
6		Purchase New Laptops	Pending Predec	johr	↓ · · · · · · · · · · · · · · · · · · ·	johnsmith
7		Upgrade Laptops	Active	johr		
8		Image Old Machines	Pending Predec	julie		Interstein provide the second sec
9		Perform Upgrade	Pending Predec	iane		janesmith;jakes
10		Test Stability	Pending Predec	julie		→ jµliesmith
11		Roll-Out	Pending Predec	johr		l <mark>≯⊟ j</mark> phnsm
12		Lessons Learned	Pending Predec	julie		iulie →
<u>}</u>		⇒ Edit Delete ♣AI	- All			Refresh Schedule Project
Task		Add				OK Save Cancel
"Save"	Succ	essful.				

Figure 9-1 Project Window with Project Plan Panel

Use the directional arrow buttons to reorganize the Project hierarchy. Tasks can be grouped and ordered into Subprojects, using the right arrow indent. Subprojects can have their tasks removed and made into separate Tasks using the left arrow is to outdent. Top-to-bottom reordering can be performed on Subprojects and Tasks as well, using the up in and down arrows. For step-by-step instructions, see "*Setting Up Project Hierarchy*" on page 87.

Project States

To display the different stages in a Project's life from planning to completion, a Master Project can have various states associated with it. These states are New, Plan, Active, Completed and Cancelled. Project Managers can move Projects into different states to facilitate the work associated with that stage of the Project. The following table describes the various Project states, their behaviors, and applications.

Project State	Behavior	Application
New	Projects and their Tasks are not shown in the My Tasks portlet or the Dashboard. Notifications are not sent and Exceptions are not triggered.	This state allows a Project Manager to manipulate the Project without having to notify Participants or Stakeholders.
	All Projects start in this state. Once a Project is moved out of the 'New' state it becomes permanently visible and cannot return to this state.	
On Hold	Projects and their Tasks are displayed in My Tasks and the Dashboard but cannot be edited. Notifications are not sent and Exceptions are not triggered. Hierarchy can be modified.	This state allows a Project Manager to manipulate the Project (such as changing project hierarchy and revising predecessors). This state informs Participants and other Managers that a rework is being done.
Active	Projects and their Tasks can be seen in My Tasks and in the Dashboard. Notifications are sent and Exceptions are triggered. Project structure can change.	This is the state of a Project that is actively being managed.
Completed	Projects and their Tasks can be seen in the Dashboard but not in My Tasks. Notifications are not sent and Exceptions are not triggered.	This is the state of a Project that has been worked to completion. The Project can be edited but will not show up as a Project or Task that needs attention.

Table 9-1. Project States and Descriptions

Project State	Behavior	Application
Cancelled	Projects and their Tasks can be seen in the Dashboard but not in the My Tasks portlet.	This state is used for Projects that are not complete but will not be worked on.
	Notifications are not sent and Exceptions are not triggered.	

Table 9-1. Project States and Descriptions

Drive also features a set of Task states. For a list of Task states, see "*Task States*" on page 115.

Modifying States

Project Managers can change states at the Master Project, Subproject, or Task level at any time.

To change the state of the Master Project:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "*Searching for Projects in the Kintana Workbench*" on page 198.
- 2. In the Project Plan Panel, select the row at the top of the hierarchy. This is the Master Project.
- 3. Select a new State for the Master Project from the drop down list in the STATE column.
- 4. Click SAVE.

To change the state of a Task, Subproject, or group of Tasks or Subprojects:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "*Searching for Projects in the Kintana Workbench*" on page 198.
- 2. In the Project Plan Panel, select the Task or Subproject whose state you wish to change. When selecting a group of Tasks or Subprojects, be sure they are all in the same state.
- 3. Select a new State for the Task or Subproject from the drop down list in the STATE column.

4. Click SAVE.

Updating Scheduling and Dependencies

Project Managers are able to update aspects of a Project at any time to reflect the changing state of a business initiative. The following sections discuss updating Project scheduling and dependencies in more detail:

- Changing Scheduled Duration, Start, Finish, and % Complete
- Changing Predecessors
- Changing Resource Assignments

Changing Scheduled Duration, Start, Finish, and % Complete

The Scheduled Duration, Scheduled Start, Scheduled Finish, and % Complete fields are viewed in the Project Plan Panel.

To change Scheduled Duration, Start, Finish, or % Complete for a Task:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "Searching for Projects in the Kintana Workbench" on page 198.
- 2. In the Project Plan Panel, select the Task that you wish to update.
 - Tasks can be edited directly inside the Project Plan Panel. Click on a field to edit its contents.
 - Tasks can also be edited through the TASK INFORMATION window, which displays more detailed information on a Task.
- 3. Click **EDIT**. The PROJECT OF TASK INFORMATION window opens, depending on whether you have selected a Project or Task.

Note

If you wish to update a Subproject's Scheduled Duration, Start, Finish, or % Complete, you must update its individual Tasks' values. This is accomplished by selecting a Task in the PROJECT window and clicking EDIT. You can then follow the process described below.

4. In the TASK INFORMATION window, click the **DETAILS** tab.

Fask Category:		~	Task State: New			•
E Action Items	E Notes	⊡ Notifications	Baselines	(≣) Referei	nces	User Data
Details	Resources	Cost	Exceptions	1	Predece	essors
Task #: 30649		Department:		Template:		
Project Path: Implem	entation Lifecycle					
Resource:		Resource Group:	Ē	Ð		
Description:				Priority:		
% Complete: 0		Confidence:]		
Milestones						
Mark task as mile:	stone					
Mark task as miles	stone lically completes					
Mark task as miles Milestone automat	stone tically completes		Finish Date			
Mark task as miles Milestone automa Start Date Sch	stone tically completes eduled: June 9, 2	003	Finish Date	cheduled: Jun	e 9, 2003	3 19
Mark task as mile: Milestone automa Start Date Sch	stone tically completes eduled: June 9, 2	003	Finish Date S	cheduled: Jun	e 9, 2003	3
Mark task as miles Milestone automa Start Date Sch	stone tically completes eduled: June 9, 2 Actual:	003 🗐	-Finish DateS	cheduled: Jun Estimated: Actual:	e 9, 2003	3
Mark task as mile: Milestone automal Start Date Sch Duration (days)	stone tically completes eduled: June 9, 2 Actual:	003 🖼	Finish Date S	<mark>cheduled: Jun</mark> Stimated: Actuel:	e 9, 2003	3 E
Mark task as mile: Milestone automal Start Date Sch Duration (days)	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0	003 📾	Finish Date S	cheduled: Jun Estimated: Actual: Cheduled: 8.0	e 9, 2003	3 të Të
Mark task as mile: Milestone automal Start Date Sch Duration (days) Est. Ren	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0 raining:	003 🖼	Finish Date S Effort (hours) S Est, R	cheduled: Jun istimated: Actual: Cheduled: 8.0 emaining: Cheduled: 8.0	e 9, 2003	3 (ř) (ř)
Mark task as miles Milestone automal Start Date Sch Duration (days) Est. Ren	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0 reining: Actual:	003 bij	Finish Date S	cheduled: Jun Stimated: Actual: Cheduled: 8.0 emaining: Actual: Cheduled: Ch	e 9, 2003	3 te
Mark task as mile: Milestone automal Start Date Sch Duration (days) Est. Ren Scheduling Constraints	stone tically completes eduled: June 9, 2 Actual: eduled: 1.0 raining: Actual:	003 🗐	Finish Date S Effort (hours) S Est, R	cheduled: Jun istimated: Actual: cheduled: 8.0 emaining: Actual:	e 9, 2003	3 E

Figure 9-2 Task Details Tab.

5. Update fields in the **DETAILS** tab.

To update SCHEDULED START and FINISH dates, enter the desired date in the appropriate date field. To make sure these dates are set explicitly and will not change after the **SCHEDULE PROJECT** button is clicked, select a CONSTRAINT TYPE (such as **START NO EARLIER THAN** Or **FINISH NO EARLIER THAN**) from the CONSTRAINT TYPE drop down list.

To update SCHEDULED DURATION and % COMPLETE, enter the new information into the appropriate text field.

- 6. To apply changes to the Task and continue to update the Task without closing, click APPLY.
- 7. To apply changes and close the window, click **OK**.

Changing Predecessors

You can specify which Tasks must be completed before beginning another Task. The Tasks that first need to be completed are Predecessors of the dependent Task. Predecessors can be changed directly in the Project Plan Panel.

External Tasks, Projects, and Requests can also be set as Predecessors for Tasks. For more information on setting these types of Predecessors, see *"Setting Up Project Dependencies"* on page 95.

To change the Predecessors for a particular Task:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "Searching for Projects in the Kintana Workbench" on page 198.
- 2. In the Project Plan Panel, click the row that contains the Task or Subproject that you wish to update.
- 3. To update Predecessors, enter the sequence numbers of the new Predecessors, separated by semicolons, into the text field of the dependent Task.

Changing Resource Assignments

Resources can be changed directly in the Project Plan Panel.

To update Resources:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "*Searching for Projects in the Kintana Workbench*" on page 198.
- 2. In the Project Plan Panel, click on the RESOURCE field of the Task that you wish to update.
- 3. Update the field with the new information. To update Resources, select the Kintana user that you wish to assign from the RESOURCE auto-complete list.

Concurrent Editing

Kintana Drive allows users to edit and update parts of Projects simultaneously, allowing for more efficient representation of changes to a Project. The following scenarios help illustrate how concurrent editing in Kintana Drive works:

- Unrelated Subprojects in a Master Project
- Simultaneous Edits on a Project
- Simultaneous Editing and Updating of a Task
- Updating an Unrelated Task

Unrelated Subprojects in a Master Project

Yukio and Bob are Project Managers with access to the same Master Project.

- 1. Yukio opens the Master Project and begins working on one of its Subprojects.
- 2. Bob opens the same Master Project and begins working on a different Subproject.
- 3. Yukio and Bob are both able to save their changes.

Simultaneous Edits on a Project

Yukio and Bob are Project Managers with access to the same Master Project.

- 1. Yukio opens the Master Project and begins working on one of its Subprojects.
- 2. Bob opens the same Master Project and tries to edit part of the same Subproject Yukio is working on.
- 3. Bob receives a message that another user is currently editing that part of the Project. Bob cannot make changes.

Simultaneous Editing and Updating of a Task

Yukio is a Project Manager and Carlos is a Resource assigned to one of the Tasks in Yukio's Master Project.

- 1. Yukio opens the Master Project and begins working on one of its Subprojects.
- 2. Carlos would like to update his Task, which is part of the Subproject Yukio is currently editing.
- 3. Carlos receives a message that another user is currently editing that part of the Project. Carlos cannot make changes.

Updating an Unrelated Task

Yukio is a Project Manager and Carlos is a Resource assigned to one of the Tasks in Yukio's Master Project.

- 1. Yukio opens the Master Project and begins working on one of its Subprojects.
- 2. Carlos opens his Task, which is not part of the Subproject Yukio is working on, and makes his changes successfully.
- 3. Yukio opens Carlos's Task.
- 4. Yukio receives a message that the Task has been updated, and the newest data will be loaded.
- 5. The information for Carlos's Task is refreshed in Yukio's Workbench window, while the other changes Yukio made persist.

Updating the Schedule

If you have modified any of your Project's hierarchy, dependencies, resources or dates, you may want to re-level the schedule. Kintana Drive generates a new schedule based on the updated dates, and whatever preferences have been set in the Settings window.

For more detailed information on updating a schedule, see "*Generating the Schedule*" on page 103.

You may also want to create a new baseline for the Project. See "*Taking a Baseline*" on page 108 for more detailed information.



When a user creates or edits a Project or Subproject, that user is the only one able to save changes.

In the case of two users wishing to edit two different Subprojects under one Master Project, opening and editing only the desired Subprojects will enable each user to save changes without interfering with each other.

See "Concurrent Editing" on page 195 for more detailed information.

Viewing Project and Task Progress

As a Project moves through its life, Managers can keep track of:

- Projects and Tasks as they are completed
- Exceptions that have been triggered
- High-level and low-level accounts of progress

Kintana provides this information through Project Management Reports and the Summary Condition View.

Searching for Projects in the Kintana Workbench

The **QUERY** tab in the PROJECT WORKBENCH window is used to locate and open Projects.

1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.

🙋 Proj	ect Workbench
Results Query	Query: None Project Manager: johnsmith Project Name: Department: Project Template: E Description: E
	Show only master project state:
	New Project Import from MSP Max Rows 200 Save Query Clear List Ready

For a complete list of all fields in the PROJECT WORKBENCH **QUERY** tab, see "Drive Workbench Reference".

- 2. Enter search criteria into the appropriate fields in the QUERY tab.
- 3. To save your query, click **SAVE QUERY**. You can then perform a quick search using these specified criteria later.

To clear all information entered into the Project Query fields, click CLEAR.

4. Click **LIST** to return the matching results in the **RESULTS** tab.

- 5. From within the **RESULTS** tab you can:
 - Sort the results based on any field in the table by clicking on the column header.
 - View a Project by double-clicking on the desired Project or selecting it and clicking **OPEN**.
 - Open multiple Projects by selecting a group (using Shift+Select or Crtl+Select from your keyboard) and clicking **OPEN**.

Searching for Tasks in the Kintana Workbench

You can locate Tasks using the **QUERY** tab in the TASK WORKBENCH window.

- 1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.
- 2. Select the TASK WORKBENCH, behind the PROJECT WORKBENCH, by either clicking on its title bar or the TASK WORKBENCH button at the bottom of the Kintana Workbench window.

🙋 Tasl	k Workbench
Results Query	Guery: None Image: Comparison of Compar
	Project Manager: Project Name:
	Scheduled Dates
	Start Date From: To: Start Date From: To: Start Date From: To: Start Date From: To: Start Date From: Start D
	Max Rows 200 Save Query Clear List
	Ready

For a complete list of all fields in the TASK WORKBENCH **QUERY** tab, see "Drive Workbench Reference".

- 3. Enter search criteria into the appropriate fields in the QUERY tab.
- 4. To save your query, click **SAVE QUERY**. You can then perform a quick search using these specified criteria later.

To clear all information entered into the Task Query fields, click CLEAR.

- 5. Click **LIST** to return the matching results in the **RESULTS** tab.
- 6. From within the **RESULTS** tab you can:
 - Sort the results based on any field in the table by clicking on the column header.
 - View a Task by double-clicking on the desired Task or selecting it and clicking **OPEN**.
 - Open multiple Tasks by selecting a group (using Shift+Select or Crtl+Select from your keyboard) and clicking **OPEN**.

Viewing the Summary Condition

The Summary Condition is a graphical indicator of the health of a Project, located next to the Project name. A Project's Summary Condition color begins as green and changes to yellow or red depending on the percentage of Tasks within a Project that have triggered Exceptions. This percentage is configurable in this tab by the Project Manager. A Project's Summary Condition is not calculated until the Project is saved.

The Summary Condition View appears in its own column next to the names of all Projects in the **RESULTS** tab of the PROJECT WORKBENCH. For more detailed information, see "*Summary Condition*" on page 65.

Viewing Milestones

In the Kintana Workbench, Milestones are visible in the PROJECT window as black diamonds in the Gantt chart.

Apr 2003		M	ay 2003				Jun 2003
W16	W17	W18	W19	W20	W21	W22	W23
-							
i 💼 i	anesmith						
4	j anesmith						
	i jai	nesmith					
	i	anesmith					
	L ⊳ ♦-	4/25/03					
	44					1	
		jake	smith				
	_	•	jake	esmith	_		
			•	jake	esmith		
	_		_	•	j	akesmith	
						5/22/03	
	_			_	4		·
						janesmith	
						j anesmith	
						jane	esmith
						l ⊳⊟ j a	nesmith
			_	_	_		pnesmith
						L++-	-5/30/03
	_		_	_	_	\	Hphnsmith
							₩ 6/2/03

Figure 9-3 Gantt Chart with Milestones

The PROJECT OVERVIEW page in the Kintana interface contains two portlets that display Milestones:

• The Project Milestones portlet lists the Milestones in a Project.

Project Milest	Project Milestones							
Name	State	Finish Date	Resource					
Testing Complete	Pending Predecessor	5/30/03						
♦ <u>Scope Complete</u>	Pending Predecessor	4/25/03						
Project Complete	Pending Predecessor	6/2/03	John Smith					
 Implementation Complete 	Pending Predecessor	5/22/03						
		Showing 1 to	4 of 4 : <u>Maximize</u>					

Figure 9-4 Project Milestones portlet

• The Project Overview Gantt portlet shows the Project's Gantt chart, including Milestones.

ame	Apr 2003			May	May 2003				Jun 2003
	W1 5	W16	W17	W18	W1 9	W20	W21	W22	W23
Sales Integration Project	l II			1					
Project Scoping		-		2					
Round 1 Plan									
Round 2 Plan		4							
Revise Plans									
Sign-Off									
Scope Complete				4/25/03					
Implementation									
Level Technology									
Upgrade				4					
Integrate Desktop Mac					4				
Integrate Laptops						L.	1-	1	
Implementation Comp							↓	5/22/03	
Test System							4.		2
Approve Test Plan									
Test Desktops							F		
Test Laptops									
Fix Bugs									1
Final Test								L.	
Testing Complete									F /30/03
Sign-Off								4	
Project Complete									6/2

Figure 9-5 Project Overview Gantt portlet with Milestones

Viewing the Project Critical Path

A Project's critical path is composed of all of the Tasks in a Project that determine its duration. In Kintana Drive, the critical path of a Project can be displayed in the PROJECT window's Gantt chart. Tasks that are part of the critical path are cross-hatched.

Apr 2003				May
VV16	V/1	7	W18	
		-		
+				
		▶ -4/21/03		
	C	C		-
		· · · · · · · · · · · · · · · · · · ·		
		×		
		►		
		>1111		
		•		24
			[♣ 4/29/03
				•

Figure 9-6 Gantt chart showing critical path

There are several ways to display or access a Project's critical path. See the following sections for more detailed information:

- Viewing the Critical Path in the Project Window
- Viewing the Critical Path from the Project Overview Gantt Portlet

• Obtaining a Critical Path Table

Viewing the Critical Path in the Project Window

A Project's critical path can be displayed in the PROJECT window's Gantt chart. To see a Project's critical path:

- 1. In the Kintana Workbench, open the Project you wish to see. For more details on searching for and opening Projects, see "Searching for Projects in the Kintana Workbench" on page 198.
- 2. Click **DISPLAY OPTIONS** in the upper-right corner of the Project window. The GANTT OPTIONS window opens.

Gantt Options	×			
Indicate Progress	Highlight Critical Path			
Indicate Exceptions	☑ Indicate Summary Condition			
Show Predecessor Arrows	Show External Predecessor Arrows			
Show Legend	🔽 Indicate Current Day			
Text to display as Task labels in Ga	antt: Label display example:			
Display to the left:	Left Label			
Display to the right: 0j Manag	er 🖽			
Display in task toottip: 🛛 🤤 🗍 Duratio	on 🖽			
	OK Apply Cancel			
Ready				

- 3. Select the HIGHLIGHT CRITICAL PATH check box and click **OK**.
- 4. The Project window's Gantt chart displays the Project critical path.

Viewing the Critical Path from the Project Overview Gantt Portlet

A Project's critical path can also be viewed from the Project Overview Gantt portlet in the PROJECT OVERVIEW page of the Kintana interface. To see a Project's critical path in the Project Overview Gantt portlet:

- 1. In the Kintana interface, navigate to the PROJECT OVERVIEW page of the Project you wish to see. For more detailed information, see "Searching for *Tasks and Projects*" on page 224.
- 2. Scroll down to the Project Overview Gantt portlet and click Edit. The filter page for the Project Overview Gantt portlet opens.

Display Options		
☑ Indicate Progress □ Highlight Critical ☑ Indicate Exceptions ☑ Indicate Summar ☑ Show Predecessor Arrows ☑ Show External Predecessor Arrows ☑ Indicate Current Day ☑ Show Name Colur ☑ Indicate Current Day ☑ Show Name Colur		th Condition ecessor Arrows
Text to display as Task k Display to the left: Display to the right: Display in task tooltip:	abels in Gantt:	Label display example: Left Label Tooltip Right Label

- 3. In the Display Options section of the filter page, select the HIGHLIGHT CRITICAL PATH check box and click **DONE**.
- 4. The PROJECT OVERVIEW page opens, refreshing all of the portlets including the Project Overview Gantt portlet.

Obtaining a Critical Path Table

The Project Critical Path Report generates a list of all the Tasks that comprise a Project's critical path in convenient HTML form.
Report F	Parameters					
Re	port Name: Project Critical	Path Report				
	Run Date: June 9, 2003 0	03:14 PM PDT				
Pro	ject Name: Development L	.aptop Upgrade	Project Manager	: Show Only Ma	ster Projects: Y	
Sched Start	Date From:		Sched Finish Date To	:		
***** Projec	ot Name: Developmen	t Laptop Upgr	ade *****			
	Project: Develop	ment Laptop	<u>Upgrade</u>			
Proj	ject Manager: John Sr	mith	Projec	t State: Active	Summary C	ondition: GREEN
	Project # 30276		Depa	artment:	Project T	emplate:
	Description:					Priority: 500
	% Complete: 20		Con	fidence:		
Sche	d. Start Date: May 02	, 2003			Actual St	art Date: May 04, 2003
Sched	. Finish Date: Jul 14, 3	2003	Estimated Finis	sh Date:	Actual Fini	sh Date:
Sched, Du	ration (days): 51	Est. F	Remaining Duration	(days):	Actual Duratio	n (days):
Sched.	Effort (hours): 872	Est	t. Remaining Effort	(hours): 9	Actual Effor	: (hours): 120
Sequence		Scheduled	Scheduled Start	Scheduled		
#	Task Name	Duration	Date	Finish Date	Predecessors	Resource Names
3	<u>Determine Laptop</u> <u>Usage</u>	3 days	May 02, 2003	May 06, 2003		John Smith
	Technology				-	
4	Assessment	2 days	May U7 , 2003	May U8, 2003	3	Jane Smith;Jake Smith;John Smith
5	Cost Analysis	21 days	May 19, 2003	Jun 17, 2003	4	Julie Smith;Jose Smith;John Smith
6	<u>Purchase New</u> Laptops	5 days	Jun 18, 2003	Jun 24, 2003	5	John Smith
	Image Old				-	
8	Machines	3 days	Jun 25, 2003	Jun 27, 2003	6	Julie Smith;Jose Smith;Jake Smith
9	Perform Upgrade	5 days	Jun 30, 2003	Jul 04, 2003	8	Jane Smith; Jake Smith
10	Test Stability	3 days	Jul 07 , 2003	Jul 09, 2003	9	Julie Smith; Jose Smith
11	Roll-Out	2 days	Jul 10, 2003	Jul 11, 2003	10	John Smith
12	Lessons Learned	1 days	Jul 14, 2003	Jul 14, 2003	11	Julie Smith;Jose Smith;Jane Smith;Jake Smith;John Smith

For more information on running Reports in Kintana Drive, see "*Reports*" on page 257.

Viewing Exceptions

Exceptions indicate that a rule that has been defined in the Project has been violated for a particular Task. For example, Resources have not been assigned to a Task that is due to begin soon, or a Task is being completed a certain number of days late. Exception Rules are configurable; for more detailed information, see *"Setting Up Exception Behavior"* on page 62.

Exceptions that have been triggered display as a red exclamation mark in the first column on the left in the **RESULTS** tab of the TASK WORKBENCH.

To view a particular triggered Exception for a Task:

1. Select a Task in the Project Plan Panel.

2. Click EDIT. The TASK INFORMATION window opens.

Note

Depending on whether you have the proper access grant to edit the Task, the button in the Project Window may read **EDIT** or **VIEW**. Users who may only **VIEW** a Task include Project Participants who have not been assigned to that particular Task, as well as Project Managers who are not managing the Project within which that particular Task is contained.

3. Click the **Exceptions** tab.

🌺 Task Info	ormation: II.	Solution Desig	IN				X
Task N	lame: 🛛 🕮	lution Design					
Task Cate	egory:		7	Task State: Read	у		•
🗉 Actio	n Items	🖻 Notes	🗉 Notifications	Baselines	Ē	References	User Data
Detai	ls	Resources	Cost	Exceptions		Prede	cessors
Triggered	Name		Rule				Violation
1	Late Tasks		Task is not yet "Com Scheduled Finish Da	nplete", and the currer ate	nt date	is 3 days past th	e 55 days
1	Tasks Startir	ng Late	Task is not yet "In Pr Scheduled Start Dat	rogress", and the curr e	rent da	te is 3 days past	the 58 days
	SPI Violation	ı.	Red if SPI > 1.0. Ye	llow if SPI ≻ 0.7			
	Unassigned	Tasks	No Resource is assi within 3 days	igned, and the Sched	uled St	art Date occurs	
	Predecesso	r Has Exception	At least one predec	essor currently has a	n exce	ption	
	Critical Path	Running Late	Critical path to this m	nilestone is running lat	e		
	CPI Violation	i i i i i i i i i i i i i i i i i i i	Red if CPI > 1.0. Ye	llow if CPI ≻ 0.7			
						OK Apply	Cancel
Ready							

The **EXCEPTIONS** tab lists the Exception Rules for the Project containing that particular Task.

- The red exclamation point in the TRIGGERED column indicates that the Task has triggered an Exception.
- The VIOLATION column displays the number of days the Task is from the Exception.

Using the Kintana Dashboard to View Progress

Project Managers can also view Projects using the Kintana interface. This interface comes with a configurable set of application windows, known as portlets, through which common Kintana queries and actions can be performed.

This interface can be expanded to include the Kintana Dashboard, which offers an expanded set of portlets that feature additional functionality, such as the Project List portlet. See "Using the Kintana Dashboard" for further details.

Project Management Reports

Kintana Drive is capable of generating a wide range of reports for project management purposes. For example, a Manager could query for the custom fields being used in a Project. A Manager can also generate reports on any Tasks that had triggered Exceptions, the Resources assigned to a Project or which Security Groups are associated with a Project. Drive features the following reports:

- Project Critical Path Report
- Project Custom Detail Report
- Project Detail Report
- Project Detail Report (Filter by Custom Fields)
- Project Exception Detail Report
- Project Resource Report
- Project Schedule Change Report
- Project Status Report
- Project Status Detail Report
- Project Summary Report
- Project Task Assignment Report
- Project Template Detail Report
- Report Type Detail Report
- Resource Availability Report
- Security Group Detail Report
- User Data Detail Report
- User Detail Report
- Validations Report

For more information about Project Management Reports, see the "*Reports*" chapter on page 257.

Comparing Against the Baseline

If you have taken a baseline of your Project, you may want to compare it to your current Project. This can be done using the Project Schedule Change Report, which can compare the current Project to any baseline, or baselines to each other.

Whew Report Submission	n y						_ 🗆	×
Parameters Scheduling No	otifications				_			
Status:	Rep	ort Number:			Requested B	y: johnsmith		
Report Type: Project Sched	lule Change							∎
Project :	Developme	ent Laptop Upgrade	≣					Γ
Compare :	Baselined	On 6/9/03		То	Developmer	nt Laptop Up;	grade 🏾	Ŧ
Show Only Changes :	C Yes	No						
Show Only Sub-Projects	O Yes	No						
Show Start Date Changes :	• Yes	C No						
Show Finish Date Changes:	• Yes	C No						
Show Duration Changes:	• Yes	C No						
Show Effort Changes:	• Yes	🔿 No						
Include Tasks Ready	• Yes	O No						
New	Yes	C No						
In Progress	• Yes	C No						
Cancelled	C Yes	No						
Pending	• Yes	C No						
Bypassed	C Yes	No						
Completed	O Yes	No						
View Report View L	.og				ок	Submit	Cance	
Report type loaded.				_				

For more information on running Reports in Kintana Drive, see "*Reports*" on page 257.

Analyzing Project Costs

Kintana Drive provides useful interfaces for visualizing Project Costs using Cost Management and the Kintana Dashboard. The two primary visualization tools are discussed below:

- Project Cumulative Cost Metrics
- Project Current Cost Metrics

Project Cumulative Cost Metrics

The ANALYZE CUMULATIVE COST METRICS page can be reached by selecting ANALYZE -> PROJECTS -> CUMULATIVE COST METRICS from the COST menu group in the navigation bar.



Figure 9-7 Analyze Cumulative Cost Metrics page

The ANALYZE CUMULATIVE COST METRICS page can be filtered according to the criteria described in *Table 9-2*.

Field	Description
PROJECT NAME	The name of the Project being analyzed.
Period	The period to be used in the graph's time axis. Possible values: WEEK , MONTH , YEAR .
START DATE	The date at which to start the graph.
FINISH DATE	The date at which to end the graph.
Include in Graph:	
PLANNED VALUE (PV)	Graphs the portion of the Baseline Cost planned to be spent between the Project's start date and each data point.
EARNED VALUE (EV)	Graphs the portion of the Baseline Cost for the entire Project that has theoretically been spent by each data point. (Baseline Cost * % Complete)
ACTUAL COSTS (AC)	Graphs the total dollar cost for the Project. (Actual Labor Cost + Actual Non-Labor Cost)
BUDGET	Graphs the Budget for the Project at each data point.
BUDGET ACTUALS	Graphs the Budget actual values, if any have been entered, at each data point.

Table 9-2. Analyze Cumulative Cost Metrics Page Parameters

Use the ANALYZE CUMULATIVE COST METRICS page to get a look at a Project's performance in terms of different Cost variables over time. The Project's projected Actual Cost is also calculated by Drive and displayed at the top of the chart.

Project Current Cost Metrics

The ANALYZE CURRENT COST METRICS page can be reached by selecting **ANALYZE** - > **PROJECTS** -> **CURRENT COST METRICS** from the **COST** menu group in the navigation bar.



Figure 9-8 Analyze Current Cost Metrics page

The ANALYZE CURRENT COST METRICS page can be filtered according to the criteria described in *Table 9-3*.

Field	Description
Project Name	
PROJECT NAME	Select a Project to be displayed.
MASTER PROJECT AND SUBPROJECT	Select a Master Project and/or Subproject to be displayed.
Other Criteria	•
DEPARTMENT	Select Projects from a certain Department to be displayed.
PROJECT MANAGER	Select Projects with a certain Manager to be displayed.
PROJECT STATE	Select Projects of a certain State to be displayed.
ACTUAL COSTS EXCEED EARNED VALUE BY	Select Projects with a Cost variance greater than a certain amount to be displayed.
PLANNED VALUE EXCEEDS EARNED VALUE BY	Select Projects with a schedule variance greater than a certain amount to be displayed.
CPI LESS THAN	Select Projects with a CPI under a certain value to be displayed.
SPI LESS THAN	Select Projects with an SPI under a certain value to be displayed.
BUDGET GREATER THAN	Select Projects with a Budget greater than a certain amount to be displayed.
BASELINE COSTS GREATER THAN	Select Projects with baseline costs greater than a certain amount to be displayed.
BUDGET ACTUALS GREATER THAN	Select Projects with Budget actual values greater than a certain amount to be displayed.
SHOW ONLY MASTER PROJECTS?	Select only Master Projects to be displayed.
Size of Bubble Indica	tes
BUDGET	Bubbles representing Projects will vary in size based on the size of their associated Budgets.
BUDGET ACTUALS	Bubbles representing Projects will vary in size based on the size of their actual Budget values, if any have been entered.
BASELINE COSTS	Bubbles representing Projects will vary in size based on the size of their last baseline costs.
PROJECTED ACTUAL COST AT COMPLETION	Bubbles representing Projects will vary in size based on the size of their projected Actual Cost at completion.

Table 9-3. Analyze Current Cost Metrics Page Parameters

Use the ANALYZE CURRENT COST METRICS page to compare the sizes and Cost health of one or more Projects.

Tracking Project History

Kintana Drive maintains a State Change History for both Projects and Tasks. The transaction history includes the Date, User Name, Project or Task Name, and Project or Task State.

To view the State Change History for a particular Task:

- 1. In the Project Plan Panel, select the Task whose State Change History you want to view.
- 2. Select **PROJECT -> VIEW -> STATE CHANGE HISTORY** from the VIEW drop down list. The STATE CHANGE HISTORY window opens.

I	ask:Define Project Objectives	- State Transa	action History		x
l	Date	User Name	Original State	Resulting State	T
I	August 8, 2001 02:25:33 PM PDT	John Smith		New	
ľ	Refresh			Close	
	Ready				

- 3. Click **REFRESH** to update the history list.
- 4. Click **CLOSE** to close the window.

To view the State Change History for a particular Subproject:

- 1. In the Project Plan Panel, select the Subproject whose State Change History you want to view.
- 2. Select **PROJECT -> VIEW -> STATE CHANGE HISTORY** from the VIEW drop down list. The STATE CHANGE HISTORY window opens.

F	Project:Implementation Lifecycle	e- State Trans	saction History	×
	Date	User Name	Original State	Resulting State
l	August 8, 2001 02:25:33 PM PDT	John Smith		New
	August 8, 2001 02:27:50 PM PDT	John Smith	New	Plan
IJ				
	Refresh			Close
	Ready			

- 3. Click **REFRESH** to update the history list.
- 4. Click **CLOSE** to close the window.

Completing, Cancelling, and Deleting Projects

All Projects must reach an endpoint. The Project can either be brought to completion, or reach a point where no more work can be done. Kintana Drive's Project states provide distinct ways of differentiating between Projects that have been Completed or Cancelled. For more detailed information on Project states, see "*Project States*" on page 190.

This section contains information on:

- Completing Projects
- Canceling Projects
- Deleting Projects



When a user creates or edits a Project or Subproject, that user is the only one able to save changes.

In the case of two users wishing to edit two different Subprojects under one Master Project, opening and editing only the desired Subprojects will enable each user to save changes without interfering with each other.

See "Concurrent Editing" on page 195 for more detailed information.

Completing Projects

Project Managers can set the Project state to **COMPLETED**. For more information, see "*Modifying States*" on page 192.

If a Project is manually set to **COMPLETED**:

- Any incomplete Tasks under that Project are set to BYPASSED.
- Any incomplete projects under that Project are set to **COMPLETED**.

Reopening a Completed Project

A Project that is Completed can be moved to **ON HOLD**.

- Upon moving the Project from Completed to **ON HOLD**:
 - o Bypassed tasks will move to a Task state of New.
- If the Project is moved to **ACTIVE**:
 - o Task states will be recalculated.
 - o Tasks previously IN PROGRESS will not regain the Task state of IN PROGRESS.

To change a Completed Project's state:

- 1. Open the Project you wish to edit. For more details on searching for and opening Projects, see "Searching for Projects in the Kintana Workbench" on page 198.
- 2. In the Project Plan Panel, select the Project at the top of the hierarchy. This will be the Master Project.
- 3. Select a new State for the Master Project from the drop down list in the STATE column.
- 4. Click SAVE.

Canceling Projects

Occasionally, all work on a particular business initiative may be stopped. The endeavor may have been found to be unprofitable, it may not be feasible given current resource limitations or there may be another business reason. Projects in Kintana Drive can have their states changed to **CANCELLED** to reflect this circumstance.

- If a Project is manually set to **CANCELLED**, any incomplete Tasks or Projects under it are set to **CANCELLED**.
- From CANCELLED, a Project can be moved back to ON HOLD using the same procedure as *"Reopening a Completed Project"* on page 215. Upon

moving the Project from **CANCELLED** to **ON HOLD**, bypassed Tasks will move to a Task state of **New**.

- Once the project is moved into an **ACTIVE** Project state:
 - o Task states will be recalculated.
 - o Tasks previously IN PROGRESS will not regain the Task state of IN PROGRESS.

Deleting Projects

Once a Project has been completed, it continues to reside in the Kintana database. It may not be necessary to archive completed Projects in the Kintana system. Projects can be deleted from the **RESULTS** tab of the PROJECT WORKBENCH.



Subprojects cannot be deleted from the **RESULTS** tab of the PROJECT WORKBENCH.

To delete a Project:

- 1. Locate the Project that you want to delete using the **QUERY** tab of the PROJECT WORKBENCH.
- 2. In the **RESULTS** tab of the PROJECT WORKBENCH, select the Project you wish to delete.
- 3. Click Delete.

Creating a URL to Open the Project Window

Project Managers and can construct a Web address (URL) that opens their Kintana Drive Project in the Kintana Workbench. They can then use this URL to access the Project from the World Wide Web or from their Intranet.

Users can construct this URL manually using either of the following formats:

```
http://host:port/kintana/servlet/SmartURL?screen=PRJ&pkid=PROJE
    CT_ID
http://host:port/kintana/servlet/SmartURL?screen=PRJ&pkname=PRO
    JECT NAME
```

You can also configure your Task notifications to automatically create and send these URLs in an email message. Include the following Token in the MESSAGE area in the NOTIFICATION window. When the email is sent, the full URL will be displayed.

[PRJ.WORKBENCH_PROJECT_URL]

See "Using Smart URLs in Notifications" on page 129 for more information on setting up Task notifications and using Smart URLs.

Printing a Project Gantt Chart

A Project Gantt chart can be printed or exported to an image file for use in presentations. The following sections discuss printing and exporting in more detail:

- Printing a Gantt Chart
- Exporting a Gantt Chart to an Image File

Printing a Gantt Chart

To print a Project Gantt chart, select FILE -> PRINT from the menu at the top of the Kintana Workbench. The PRINT GANTT CHART wizard opens, allowing you to select options for the Gantt chart's Project display, time range, Project Plan columns, and generic printer settings.

Print Gantt Chart		X
Fitter Options Time Range Settings Column Visibility Print Settings Preview	Please choose criteria to filter the tasks included in the printed Ganti o Resource: Task State: IF Ready IF New IF In Progress IF Cancelled IF Pending IF Bypassed	chart:
	Include in Gantt. I Projects Task Category: Include in Gantt. I Projects Include In Gantt. I Milestones	
	Limit hierarchy depth to	
	Cancel < Back Next > P	rint

Figure 9-9 Print Gantt Chart Wizard

Exporting a Gantt Chart to an Image File

A Project Gantt chart can also be exported to an image file with the same options as normal printing. The following file formats are supported:

- JPEG
- PNG
- GIF
- BMP

To export a Project Gantt chart to an image, select File -> Export to Image from the menu at the top of the Kintana Workbench. The Export Gantt Chart Wizard opens, allowing you to select options for the Gantt chart's Project display, time range, Project Plan columns, and generic image settings.

🌺 Export Gantt Chart				×
Filter Options Time Range Settings Column Visibility Image Settings Preview	Please choose criteria to Resource: Resource Group: Task State:	filter the tasks includ	ied in the exported Gant I New I Cancelled I Bypassed	t chart:
	Task Category: Include in Gantt:	Completed Projects Tasks Milestones Limit hierarchy dept	th to	
	Show only Critical Path?	C Yes ເ No		
	Cancel	< Back	ext > Save Ima	ige

Figure 9-10 Export Gantt Chart Wizard

Chapter **100** Updating Tasks: Project Participant Activities

Project Participants view and update their Tasks using the Kintana interface. Kintana Drive defines Project Participants as users who work on Tasks as part of a Project team, but do not have the administrative responsibilities of a Project Manager.

The Kintana interface comes with a configurable set of application windows, known as portlets, through which common Kintana tasks can be performed. This interface can be expanded to include the Kintana Dashboard, which offers an expanded set of portlets that feature additional functionality.

Note

Depending on the products your company has licensed, not all portlets may be available. For example, if your company has only licensed Kintana Drive, then the My Requests portlet will not appear on the Homepage. See "Using the Kintana Dashboard" for a list of portlets available with each product installation.

This chapter discusses the following Project Participant tasks:

- Logging On to Kintana
- Changing Password
- Changing Portlet Preferences
- Locating My Tasks
- Viewing Project Information
- Updating My Tasks
- Viewing and Adding Notes
- Viewing and Modifying References

• Viewing Reports

Logging On to Kintana

Kintana is accessed through a standard Web browser. Be sure to contact your Kintana System Administrator for the URL of the Kintana implementation at your site, as well as your username and password.

To logon to Kintana:

1. Enter the URL of your Kintana implementation in a Web browser. The Kintana logon page opens.

🕗 Kintana Logon - Microsoft Internet Explorer	_ 🗆 ×
<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	
Address http://kintana.com/kintana/web/knta/global/Log.jsp	▼ 🖉 Go Links ≫
	A
ΚΙΝΤΑΝ Α	
]
lisername:	
Password	
Remember my logon	
Submit	ŕ
Copyright © 2002 Kintana	
Done	
	///

2. Enter your username and password in the corresponding fields in the Kintana logon page.

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 unless you actually sign out.

3. Click Submit.

After successfully logging onto Kintana, your Kintana Homepage opens.

Changing Password

After logging on for the first time, you may wish to change your password.

To change your password in Kintana:

1. From the SETTINGS menu group in the navigation bar at the left, select EDIT MY PROFILE. The EDIT MY PROFILE page opens.

Edit My Profile	
Change Password	
Old Password:	
New Password:	
Repeat New Password:	
Portlet Preferences	
Results in Maximized Portlets:	
	Done

- 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.

Your password has now been changed in Kintana.



You will receive an error message, after trying to change your password, if:

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

Changing Portlet Preferences

You can maximize certain portlets, which causes the portlet to fill the available window area in your browser. The PORTLET PREFERENCES option allows you to specify the maximum number of rows that will be displayed in a maximized portlet.

To specify the maximum number of rows in a maximized portlet:

- 1. From the SETTINGS menu group in the navigation bar at the left, select EDIT MY PROFILE. The EDIT MY PROFILE page opens.
- 2. Enter the maximum number in the RESULTS IN MAXIMIZED PORTLETS field.
- 3. Click Done.

Locating My Tasks

Project Participants update their Task status in Kintana Drive. Kintana provides several different ways for Participants to locate their Tasks:

- *Searching for Tasks and Projects* Project Participants can search for Tasks directly, or they can search for Projects in order to get to the Tasks they want through the Projects that contain them.
- *Finding Tasks Using the My Tasks Portlet* The My Tasks portlet allows users to update multiple Tasks at once, as well as providing links to individual Task details.
- *Finding Tasks Using Notifications* Tasks can be reached from a Notification simply by clicking on the link provided in the body of the email, or by copying and pasting it into any Web browser.
- *Finding Tasks in the Kintana Workbench* Project Participants can also search for and update Tasks in the Kintana Workbench.

Searching for Tasks and Projects

Participants can search for Tasks and Projects that match certain criteria using the TASK SEARCH and PROJECT SEARCH pages. The following sections provide instructions for locating tasks and projects:

• Locating Tasks Using the Task Search Page

• Locating Projects Using the Project Search Page

Locating Tasks Using the Task Search Page

Participants can search for Tasks using the TASK SEARCH page. For a complete list of available parameters, see "*Drive Workbench Reference*".

To locate Tasks in Kintana:

1. From the **SEARCH** menu group in the navigation bar at left, select **TASKS**. The TASK SEARCH page opens.

Task Search	
Search Information Sear	rch Cancel
Task Name: Task #:	
Resource: 📕 Department:	
Task Category:	
Include Finished Tasks: O Yes 💿 No 🛛 Task State: 📃 🔳	
Scheduled Start Date From: 🛛 🖄 To:	
Scheduled Finish Date From: 🔯 To: 🔯	
Show only tasks with exceptions? O $_{\rm Yes}$ \odot $_{\rm No}$ Show only milestones? O $_{\rm Yes}$ \odot $_{\rm No}$	
Related Information	
Project Name: 🔲 🗄 Project Manager: 📰	
	Clear Fields
Result Display Options	
Sort By: Task Name 🔹 💿 Ascending	
C Descending	
*Maximum Tasks Displayed: 50	
Sear	rch Cancel

- 2. Enter the search criteria for the desired Task. You can search for an existing Task based on any of the fields located on the TASK SEARCH page. Limiting the maximum number of results in the MAXIMUM TASKS DISPLAYED field can yield quicker results.
- 3. Click SEARCH. The TASK SEARCH RESULTS page opens.

The Task Search Results page displays the results matching your search criteria.

Task Search Results						
						Showing 4 Results
Task Name	Task Category	Task State	Scheduled Start	Scheduled Finish	Resource	Department
Estimate Complete		New	April 21, 2003	April 21, 2003	John Smith	
Project Complete		Pending Pred	June 2, 2003	June 2, 2003	John Smith	
<u>Sign-Off</u>		Pending Pred	May 30, 2003	May 30, 2003	John Smith	
Upgrade Complete		New	April 29, 2003	April 29, 2003	John Smith	
						Showing 4 Results

Click on the name of any Task in the list to view its DETAILS page. See *"Viewing and Updating Task Details"* on page 242 for more information. To clear all fields in the Task Search Query page and reset to default values, click **CLEAR FIELDS**.

Locating Projects Using the Project Search Page

While Project Participants can locate and view Projects, only Participants with a Project Manager access grant can edit Projects, through the Kintana Workbench interface.

Participants can locate Projects using the PROJECT SEARCH page.

To search for Projects in Kintana:

1. From the **SEARCH** menu group in the navigation bar at left, select **PROJECTS**. The **PROJECT SEARCH** page opens.

Project Search		
Search Information	Search	Cancel
Project Name: Project #: Project Manager: Department: Department: Summary Condition: No Summary Condition Scheduled Start Date From: Scheduled Start Date Fr		
Scheduled Finish Date From: 🛛 🕲 To:	2	
Show only master projects? ③ Yes O No		
Program:		
		Clear Fields
Result Display Options		
Sort By: Project Name 💽 💿 Ascending O Descending *Maximum Projects Displayed: 50		
	Search	Cancel

- 2. Enter the search criteria for the desired Project. You can search for an existing Project based on any of the fields located on the PROJECT SEARCH page. Limiting the maximum number of results in the MAXIMUM PROJECTS DISPLAYED field can yield quicker results.
- 3. Click **SEARCH**. The PROJECT SEARCH RESULTS page opens.

The PROJECT SEARCH RESULTS page displays the results matching your search criteria.

Project Search Results					
					Showing 2 Results
Project Name	Project State	Scheduled Start	Scheduled Finish	Project Manager	Department
Sales Integration Project	Active	April 15, 2003	June 2, 2003	John Smith	
Support Upgrade Project	New	April 16, 2003	April 30, 2003	John Smith	
					Showing 2 Results

Click on the name of a Project to view its PROJECT OVERVIEW page. See *"Viewing Project Overview"* on page 233 for more information. To clear all fields in the Project Search page and reset to default values, click **CLEAR FIELDS**.

Finding Tasks Using the My Tasks Portlet

The My Tasks portlet is available to all Kintana Drive users. This portlet is included on your Kintana Homepage by default. It shows a configurable list of the Tasks currently assigned to the user.

Participants can update Task States and fill in information that the Project Manager would like to collect for all Tasks displayed. In this way, the My Tasks portlet can save valuable time by providing a single point for multiple Tasks to be updated at once.

The Participant can also click on the name of a Task in the Task List to view its DETAILS page. See *"Viewing and Updating Task Details"* on page 242 for more information.

My Tasks							
John Smith's tasks scheduled to finish on or before April 25, 2002							
<u>Define Project</u> Task State:	Objectives Implementatio	<u>n Lifecycle</u> > Define Project Objectives Sched Start: 4/10/02	Sched Finish: 4/12/0	2			
*% Complete:	0						
Define Initiativ	e Constraints Implement	ation Lifecycle > Define Initiative Constraint	~				
Task State:	Pending Predecessor	Sched Start: 4/15/02	Sched Finish: 4/15/0	2			
*% Complete:	0						
			Save	Reset			
			Showing 1 to	2 of 2: <u>Maximize</u>			

Figure 10-1 My Tasks Portlet

Finding Tasks Using Notifications

Email notifications can be configured by Project Managers to include hyperlinks to Tasks in Kintana. If you have received an email containing a link to a Task, click on it, and it will open to that Task's DETAILS page in your Web browser. If your email client doesn't handle HTML links directly, copy and paste it into your Web browser.

Finding Tasks in the Kintana Workbench

The Kintana Workbench is the Java application that allows for configuration as well as creation and processing of Projects, Project Templates, and Tasks. Project Participants can also search for and update Tasks in the Workbench.



Only Kintana users who have been given a Power license can access the Workbench. Project Participants with a Power license can access the Workbench, but as in the Kintana interface, they will not be able to edit Project information or update Tasks they have not been assigned.

Project Participants can find Tasks by searching for them directly, or by looking for the Projects that contain them.

The following sections contain more detailed information on searching for Tasks and Projects, as well as updating Tasks, in the Kintana Workbench:

- Searching for Tasks in the Kintana Workbench
- Searching for Projects in the Kintana Workbench
- Updating Tasks in the Project Plan Panel
- Updating Tasks in the Task Information Window

Searching for Tasks in the Kintana Workbench

You can locate Tasks using the **QUERY** tab in the TASK WORKBENCH window. To search for Tasks from within the Kintana Workbench:

- 1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.
- 2. Select the TASK WORKBENCH, behind the PROJECT WORKBENCH, by either clicking on its title bar or clicking **TASK WORKBENCH** at the bottom of the Kintana Workbench window.

🙋 Tasl	k Workbench
ResultsQuery	Guery: None Resource: Image: Resource Group: Task Name: Task # : Task Category: Image: Description: Include Finished Tasks: Yes Show only milestones? Yes
	Project Information Project Manager: Project Name: Project
	Start Date From: Image: Construction of the start Date From: Imag
	Ready

For a complete list of all fields in the TASK WORKBENCH **QUERY** tab, see "Drive Workbench Reference".

- 3. Enter search criteria into the associated fields.
- 4. To save your query, click **SAVE QUERY**. You can then perform a quick search using these specified criteria anytime later.
- 5. Click **LIST** to return the matching results in the **RESULTS** tab.
- 6. From within the **RESULTS** tab:
 - View a Task by double-clicking on the desired Task or selecting it and clicking **OPEN**. The TASK INFORMATION window opens.
 - Open multiple Tasks by selecting a group (using Shift-Select or Crtl-Select) and clicking **OPEN**. Many TASK INFORMATION windows open, one for each selected Task.
- 7. Update Task information in the TASK INFORMATION window. For details on updateable fields, see "*Updating Tasks in the Task Information Window*" on page 232.

Searching for Projects in the Kintana Workbench

The **QUERY** tab in the PROJECT WORKBENCH window is used to locate and open Projects. To search for Projects from within the Kintana Workbench:

1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens, with the **QUERY** tab defaulted to appear on top.

Proj	ect Workbench
ner	Query: None
<u> </u>	Project Manager: johnsmith 🖽 Project # : Summary Condition: 🔠
sult	Project Name: Department: 🔠
Res	Project Template: Description:
	Include Finished Projects: 🔿 Yes 💿 No 🛛 Project State: 🛛 🧮 🛛 Program: 🕅 🧮
	Show only master projects?
	Cheduled Dates
	Start Date From: To: Start Date From: To: Start Date From:
	Finish Date From: To: To: Finish Date From: To: To: To:
	New Project Import from MSP Max Rows 200 Save Query Clear List
	Ready

For a complete list of all fields in the PROJECT WORKBENCH **QUERY** tab, see "Drive Workbench Reference".

- 2. Enter search criteria into the associated fields.
- 3. To save your query, click **SAVE QUERY**. You can then perform a quick search using these specified criteria anytime later.
- 4. Click LIST to return the matching results in the RESULTS tab.
- 5. From within the **RESULTS** tab:
 - View a Project by double-clicking on the desired Project or selecting it and clicking **OPEN**. The PROJECT window opens.
 - Open multiple Projects by selecting a group (using Shift-Select or Crtl-Select) and clicking **OPEN**. Multiple **PROJECT** windows open, one for each selected Project.
- 6. From within the PROJECT window, you can edit Tasks directly, or edit them in the TASK INFORMATION window. See "Updating Tasks in the Project Plan Panel" on page 231 and "Updating Tasks in the Task Information Window" on page 232 for more information.

Updating Tasks in the Project Plan Panel

Project Participants can update Tasks displayed in the Project Plan Panel.

To update Task information from the Project Plan Panel:

- 1. Select the Task you want to update.
- 2. Click on the desired field to update its contents directly.

Project Participants can only update the fields that have been enabled for them to edit by the Project Manager. This set of fields can vary. For a complete list of fields available for update, see "*Drive Workbench Reference*". Additionally, Participants can only update those Tasks that have been assigned to them. All other Tasks will be view-only. This is also true for Project Managers viewing Tasks and Projects that they are not in charge of.

Updating Tasks in the Task Information Window

Project Participants can also update Tasks inside each Task's INFORMATION window.

To edit Task information in the TASK INFORMATION window:

- 1. Open the TASK INFORMATION window by one of the following ways:
 - Query and open the Task directly from the TASK WORKBENCH. The TASK INFORMATION window opens.
 - Query and open an existing Project. Double-click the Task you want to edit, or select it and click EDIT. The TASK INFORMATION window opens.
- 2. Make all necessary changes in the TASK INFORMATION window.
- 3. Click OK.

Project Participants can only update the fields that have been enabled for them to edit by the Project Manager. This set of fields can vary. For a complete list of fields available for update, see "*Drive Workbench Reference*". Additionally, Participants can only update those Tasks that have been assigned to them. All other Tasks will be view-only. This is also true for Project Managers viewing Tasks and Projects that they are not in charge of.

Viewing Project Information

Project Participants may want to view the Projects they are part of in the Kintana interface, as a way of setting context for their own Tasks, checking on other dependent Tasks, or keeping track of deadlines. Participants can view the following Project information at any time:

- Viewing Project Overview
- Viewing Project Details

- Viewing Project Hierarchy
- Viewing Exceptions
- Viewing Project References
- Viewing the Project Gantt Chart
- Viewing the Critical Path
- Viewing Project Milestones

Viewing Project Overview

The PROJECT OVERVIEW page displays a wide range of information about a particular Project: its Subprojects and Tasks, its State and Project Manager, and any Exceptions it may have triggered. All of this data and more is presented and arranged through the following portlets:

- **Project Summary** Displays the Project's name, state, % complete, manager, description, scheduled start, and scheduled finish. It also contains a link to the PROJECT DETAILS page. See "*Viewing Project Details*" on page 234.
- **Project Overview Gantt Portlet** Displays the Gantt chart for a Project. See "*Viewing the Project Gantt Chart*" on page 239.
- **Project Milestones Portlet** Lists the Milestones in a Project. See *"Viewing Project Milestones"* on page 240.
- **Subprojects and Tasks Summary** Provides a list of all Subprojects and Tasks included in that Project, and a link to the Project Plan, located on the PROJECT HIERARCHY page. See "*Viewing Project Hierarchy*" on page 236.
- **Exception Summary** Shows the number and kinds of Exceptions triggered and links to the Exception Details portlet. See "*Viewing Exceptions*" on page 237.
- **Project References** Provides a list of all References linked to the Project (Requests, Packages, Tasks, Projects, Releases, Attachments, URLs) and where in the Project they are Referenced from. See "*Viewing Project References*" on page 239.
- **Project Related Actions Portlet** Displays links to a Project's Assignment visualizations and Staffing Profiles. See "*Managing Resources in Kintana*" for more details.

remance Pro	piect Rollout					
	oject Rollout			_		
Project S	Summary	-?	Edit + X	Project Excep	otion Summary	
oject Name	e: 🛛 Go	vernance Project R	ollout			
oject State	Active			No results found.		
Complete:	31%		⊐ □			
oject Mana	iger: George	Heath				
escription:				Project Relat	ed Actions	
hed Start:	5/15/03	3				
neu rinisi ogram Nar	: 10/20/0	13		view Assignments r	or this Project.	
rogram Mar	nager:			View Staffing Profile	es for this Project.	
	Project	Betails Edit Pr	oject Plan			
Project N	tilestones					
Name	State	Finish Re	source			
Callina	Deedies	Date	in Miles			
GO LIVE	Predecessor	10/20/03 Jul	e miles			
Commit to	Pending Predecessor	8/4/03				
_		Showing 1 to 2 of	2 : <u>Maximize</u>			
_	_		_			
Project C	Overview Gan	u				? Edit + X
tered by: Tir	me Range: All; :	Include in Gantt: Pr	ojects, Tasks, M	lestones; Task State:	Ready, New, In Pro	gress, Can
isk Name		May	Jun J	ul Aug	Sep	Oct
Governar	ice Project Ro	110				
I. Requir	ements Analysis		Gina Anderson	Inspace		
III. Prote	otype		- John I	Arnie Gaetz;Greg /	Newby;John Vicks	
IV. User	Acceptance			Mel Fi	sch	
Commit t	to Project			→ ••••••••••••••••••••••••••••••••••••	03	
V Dat-II	od Docian				DUIL CINES	
V. Detail VI. Build	ed Design				Bill Gibbs	Gaetz:Greg Newby:Bil
V. Detail VI. Build VII. Test	ed Design				Bill Gibbs	Gaetz;Greg Newby;Bil
V. Detaile VI. Build VII. Test VIII. Use	ed Design er Signoff				Bill Gibbs Arnie ↓	Gaetz;Greg Newby;Bil Hel Fisch
V. Detail VI. Build VII. Test VIII. Use IX. Train Go Live	ed Design : er Signoff : Users				Bill Gibbs	Gaetz;Greg Newby;Bil -Mel Fisch -Julie Miles;Georg -Gina Ar -Gina Ar -Gina Ar
V. Detail VI. Build VII. Test VIII. Use IX. Train Go Live Tasks: Read Milestone:	ed Design er Signoff 1 Users V: 📰 In Prog Projects: 🕶	ress: Pendings Predecessors:	Completer	i: Cancelled/Bypi decessor:	Bill Globs	Geetz;Greg Newby;Bil Mel Floch Georg Geor
V. Detaik VI. Build VII. Test VIII. Use IX. Train • Go Live Tasks: Read Milestone: •	ed Design er Signoff i Users Y: In Prog Projects: In Prog cts and Tasks	ress: Pendings Predecessors:	Complete External Pre	5: Cancelled/Byp decessor: T	assed: Except	Goetz ;Greg Newby;Bil Mei Flach Julie Hiles;Georg Gins Ar Gins Ar 10/20 1
V. Detail: VI. Build VII. Test VIII. Test VIII. Use IX. Train Co. Live Tasks: Read Milestone: Subproje Governance Name	ed Design r Signoff i Users Y: In Prog Projects: To cts and Tasks Project Rollout	Predecessors:	Complete External Pre	t: Cancelled/Byp decessor: ****	sessed: Except	Gnetz ;Greg Newby;Bil Mei Flach Gina Ar Gina
V. Detail: VI. Build VII. Test VIII. Test IX. Train Go Live Tasks: Read Milestone: Subproje Governance Name	ed Design er Signoff i Users Y: In Prog Project: Tollout Project Rollout	ves: Pending Predecessor: Summary % Complete	Complete External Pre	t: Cancelled/Byp decessor: *** Sched Start	Assed: Except	Gnetz Greg Newby 281 Hel Floch Hel Floch Hel Score Gins Ar Hel 10/20 ion: 1 to 12 of 12 : <u>Maximize</u> Project Manager
V. Detaili VI. Ruild VII. Test VIII. Use IX. Train Go Live Tasks: Read Milestone: Subproje Governance Name I. Requirem	ed Design	Pendinguessions: Predecessons: Summary % Complete 100.1	Complete External Pre State Completed	Cancelled/Byp decessor:	Arring 1 Sched Finish 6/3/03	Geet: Greg Newby; Bil He Flech Hypele Hiles; Searc Gina Ar Constant 2 cm + x Project Manager Gina Anderson
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V. Detaili VI. Build VII. Test VIII. Us VIII. Us VIII. Us Subproje Governance Name I. Requirem II. Solution III. Prototy:	ed Design	ress: Pending: Predecessors: Summary % Complett 100.1 100.1 50.1	Complete External Pre State Completed Completed Completed D In Progress	5: Cancelled/Byp decessor: *** Sched Start 5/15/03 6/23/03	ssed: ■ Except Showing 1 Sched Finish 6/3/03 6/20/03 7/11/03	Geett: Greg Newby; Bil →gei Flech →gijule Nike; Goorg →gijule Nike; Goorg →gi ang / yoyc to 12 of 12 : <u>Maximize</u> -2] : ang -± ± Project Manager Gine Anderson John Brenner Arnie Gaet
V. Detaili VI. Testi VII. Testi VII. Testi VIII. Used JX. Train Governance Subproje Governance Name I. Requirem II. Solution III. Prototyr IV. User Acc	ed Design r Signoff Users Projects: Project Rollout ents A Design Design Design Design	Predecessors: Predecessors: Summary % Complett 100.1	Complete State State Completed Completed Completed D In Progress Pending Pr	Cencelled/Byp decessor: *** Sched Start 5/15/03 6/4/03 6/23/03 7/14/03	• side • side • side • side • showing 1 • Sched Finish • 6/3/03 • 6/20/03 • 7/11/03 • 8/1/03	Geet: Greg Newby; Bil gent Sten gent Sten gent Area Greg Anderson John Brenner John Brenner Arrie Gaet Mel Fisch
V. Detaili VI. Test. N. Train Subproje Subproje Governance Name I. Requirem II. Solution. II. Solution VI. Test. V. User Acc. Commit to F	ed Design	Pending: Predecessors: Summary % Complet 100.1 100.1 00.1	Completed State Completed Completed Completed D Pending Pr Pending Pr	5/15/03 6/4/03 6/4/03 6/4/03	4 giii Gibes 4 gii Gibes	Geett; Greg Newby; Bill Hele Flech Helguie Nike; Georg Helguie Nike; Georg Helguie Nike; Georg Helguie Nike; Georg Helguie Nike; Georg Helguie Nike; Georg Project Manager Gina Anderson John Brenner Arnie Gaet Mel Fisch
V. Detailing V. Detailing VI. Test VII. Test VII. Test VIII. Use VIIII. Use VIIII. Use VIIII. Use VIIII. Use V	ed Desian	Predecessors: Predecessors: Summary % Complete 100.1 100.1 50.1 0.0 0.1 0.1 0.1 0.1 0.1 0.1	Completer State Completed Completed Completed Completed Pending Pr Pending Pr Pending Pr	t: Cancelled/Byp decessor: *** Sched Start 5/15/03 6/4/03 6/23/03 7/14/03 8/4/03 8/4/03	ssed: ■ Except Showing 1 Sched Finish 6/3/03 6/20/03 7/11/03 8/4/03 8/20/03	Geett; Greg Newby; Bil →gla Flech →glaule Nike; Georg →glaule Nike; Georg →glaule Alke;
V. Detailt VI. Test VII. Test VIII. Us VII. Test VIII. Us VIII. US	ed Desian	Predecessors: Predecessors: Summary % Complett 100.1 100.1 0.0 0.0 0.0 0.0 0.0	Complete State Completed Completed Completed Completed D Pending Pr Pending Pr Pending Pr Pending Pr Completed C	 Cencelled/Byp Sched Start 5/15/03 6/4/03 6/23/03 7/14/03 8/4/03 8/4/03 8/21/03 	• §III Gilbs • ↑ mini • ↑ mini • ↑ mini • ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑	Geett; Greg Newby; Bil →gei Fiech →giue Nike; Goorg →giue Nike; Go
V. Detailing VI. Test VI. Test VII. Test VII. Test VIII. Test VIII. Test VIII. Test	ed Design	**************************************	Completes External Pre State Completed Completed Ormpleted In Progress Pending Pr	5/15/03 6/4/03 6/4/03 8/4/03 8/4/03 8/4/03 8/21/03 8/21/03	4 giii Gibes 4 gii Gibes	Geett: Greg Newby; Bill Helf Ficeh Helf Siceh Helf Sice Helf Sice Helf Sice Project Manager John Brenner Arnie Gaet Bill Gibbs Arnie Gaet
V. Detailing VI. Test VI. Test VI. Test VII. Use VII. Test Subproje Subproje Subproje Subproje Subproje Subproje VI. Test VI. Test VI. VI. Vest VI. Detailed VI. Detailed VI. Detailed VI. Test	ed Desian	Predecessors: Predecessors: Summary % Complet 100.1 1	Completee External Pre External Pre Completed Completed Completed Dending Pr Pending Pr Pr Pending Pr Pr Pendi	5/15/03 6/4/03 6/23/03 7/14/03 8/4/03 8/4/03 8/21/03 9/12/03 9/12/03	• giii Gibes → giiii Gibes → giii Gibes → gii	Geett; Greg Newby; Bill Hell Flech Hell Jule Hilles; Georg Hell Jule Hilles; Georg Hell Jule Hilles; Georg Hell Start Project Manager Gina Arderson John Brenner Arnie Geet Hel Fisch Bill Gibbs Arnie Geet Mel Fisch Julie Mile
V. Detailing VI. Build VI. Build VI. Build VI. Test VII. User Sa VIII. User Sa VIIII. User Sa VIII. User Sa VI	ed Desian Fision of the projects Cts and Tasks Projects Collout ents A Desian 22 20 20 20 20 20 20 20 20 20 20 20 20	Predecessors: Predecessors: Summary % Complett 100.1 100.1 0.0 0.0 0.0 0.0 0.0	Complete External Pro Completed Completed Completed Completed Pending Pr Pending Pr Pending Pr Pending Pr Pending Pr Pending Pr Pending Pr	E: Cancelled/Byp decessor: *** Sched Start 5/15/03 6/23/03 6/23/03 7/14/03 8/4/03 8/4/03 8/21/03 9/12/03 10/1/03 10/2/03	ssed: ■ Sheving 1 Sched Finish 6/3/03 6/20/03 7/11/03 8/4/03 8/4/03 8/4/03 9/11/03 9/30/03 10/17/03	Geetz, Greg Newby; Bil Hel Flech Hel Flech Gins Ar Gins Ar Gins Ar Gins Ar Gins Ar Gins Ar Gins Ar Hel Star Bill Gibbs Arnie Gaet Mel Fisch Bill Gibbs Arnie Gaet Mel Fisch Gins Anderson Julie Mile Gins Anderson
V. Detailing VI. Bauld VI. Bauld VI. Test VI. Bauld VI. Test VIII Use Subproje Governance Name I. Requirem III. Solution VI. User Act Commit to f V. Detailed VI. User Act Commit to f V. Detailed VI. User I X. Train Us Zo Live X. Train User So VII. Test	ed Desian Fisionoff Cts and Tasks Project: Cts and Tasks Project Rollout ents A Desian Desian Cts and Cts a	Predecessors; Predecessors; Summary % Complete 100.4 100.4 100.4 100.4 0.0 0.0 0.0 0.0 0.0 0.0 0.0	Complete State State Completed Completed Completed Completed Pending Pr Pending P	Cancelled/Byp decessor: Cancelled/Byp decessor: Cancelled/Byp 6/23/03 6/23/03 6/23/03 8/4/03 8/4/03 8/4/03 8/21/03 9/12/03 10/1/03 10/2/03	• ¶ii Gibs → ↑ mia ssed: ↑ ↑ mia Sched Finish 6/3/03 6/2/03 7/11/03 8/1/03 8/4/03 8/4/03 8/20/03 9/11/03 9/11/03 10/1/03 10/2/03	Geetz Greg Newby; Bil Hel Fisch Hel Fisch Gins Ar Project Manager Gins Anderson John Brenner Arnie Gaet Mel Fisch Bill Gibbs Arnie Gaet Mel Fisch Julie Mile Gina Anderson Julie Miles

Figure 10-2 Project Overview Page

Users can access the Project Overview page through the Project Search Results page, as well as the Project List portlet, which is available for display on the Participant's Kintana Homepage as part of the Kintana Dashboard. See *"Configuring the Kintana Dashboard"* for more information.

Viewing Project Details

The PROJECT DETAILS page contains detailed information on a particular Project, grouped into the following categories:

• **PROGRESS** - % complete, confidence, start date (scheduled and actual), finish date (scheduled, estimated, and actual), duration (scheduled,

estimated remaining, and actual), and effort (scheduled, estimated remaining, and actual).

- **DETAILS** Project number, Project Template, department, description, priority, complete and incomplete predecessors.
- ACTION ITEMS Action item names, states, and priorities.
- Notes Any notes.
- **REFERENCES** Requests, Packages, other Projects, URLs, and attachments.

Project De	etails							
Project Name: Budget: Show All Section	Kintana Pilot <u>Kintana Pilot</u> hide All Section	Project Mar	nager: Admin	User Pro	oject Sta	te: Active	3	
Progress	50							
va comprete:	50							
Start Date		Finish Date		Duration) 	a a dawa	Effort	
Actual: F	February 5, 2003 February 6, 2003	Scheduled: Actual:	July 10, 2003	Actual:	e a: 11	u.u days	Actual:	736.0 hours
Details								
Project Template:								
Predecess	ors							
Name There are no pre	edecessors found.	s	tate	R	esource	,		
- Costs								
Project Cos	st Health							
Cost Overviev	N							
Labor	Baseline							
Action Itoms	\$22,000	_	_	_	_	_	_	
Description				Sta	tus	Priority		
Inere are currer	ntiy no action items.	_	_	_	_	_	_	
Notes								
There are currer	ntly no notes.							
References								
There are currer	ntly no references at	ttached.						

Figure 10-3 Project Details Page

The PROJECT DETAILS page can be accessed through the Project Summary Portlet in the PROJECT OVERVIEW page, which contains a link to the PROJECT DETAILS page.

Project Summary					
Project Name:	Governance Project Rollout				
Project State:	Active				
% Complete:	31%				
Project Manager:	George Heath				
Description:					
Sched Start:	5/15/03				
Sched Finish:	10/20/03				
Program Name:					
Program Manager:					
	Project Details Edit Project Plan				

Click **PROJECT DETAILS** to go to the **PROJECT DETAILS** page.

Viewing Project Hierarchy

The PROJECT HIERARCHY page displays the Project's hierarchical organization of Tasks and Subprojects (its Project Plan) as well as information such as:

- Task or Subproject name
- Task or Subproject state
- Task or Subproject scheduled duration, start, and finish
- Task or Subproject predecessors
- Task or Subproject Resource or Manager
- Task Exceptions or Subproject Summary Condition

The PROJECT HIERARCHY page is useful for providing context for Participants in terms of the location of their Tasks in the overall Project framework, as well as indicating Summary Conditions and Exceptions at a glance.

Clicking on any Task within the PROJECT HIERARCHY page takes the user to that Task's DETAILS page. See "*Viewing and Updating Task Details*" on page 242 for more detailed information.

Project Hierarchy							
Project Name: 🗖 Governance Projec Project Manager: George Heath Project State: Active							
Hiera	irchy						
Seq #	* Project Name	State	Scheduled Duration (days)	Scheduled Start	Scheduled Finish	Preds	Project Manager / Resource
1	Governance Project Rollout	Active	111.0	5/15/03	10/20/03		George Heath
2	<u>I. Requirements Analysis</u>	Completed	13.0	5/15/03	6/3/03		Gina Anderson
3	<u>II. Solution Design</u>	Completed	13.0	6/4/03	6/20/03	2	John Brenner
4	III. Prototype	In Progress	15.0	6/23/03	7/11/03	3	Arnie Gaetz;
5	IV. User Acceptance	Pending Predecessor	15.0	7/14/03	8/1/03	4	Mel Fisch
6	Commit to Project	Pending Predecessor	0.0	8/4/03	8/4/03	5	
7	<u>V. Detailed Design</u>	Pending Predecessor	13.0	8/4/03	8/20/03	6	Bill Gibbs
8	VI. Build	Pending Predecessor	16.0	8/21/03	9/11/03	7	Arnie Gaetz;
9	VII. Test	Pending Predecessor	13.0	9/12/03	9/30/03	8	Mel Fisch
10	VIII. User Signoff	Pending Predecessor	1.0	10/1/03	10/1/03	9	Julie Miles;
11	IX. Train Users	Pending Predecessor	12.0	10/2/03	10/17/03	10	Gina Anderson
12	♦ <u>Go Live</u>	Pending Predecessor	0.0	10/20/03	10/20/03	11	Julie Miles

Figure 10-4 Project Hierarchy Page

The PROJECT HIERARCHY page can be accessed through the Subprojects and Tasks Summary portlet in the PROJECT OVERVIEW page, which contains a link to the PROJECT HIERARCHY page.

Subprojects and Tasks Su	mmary				? _ Edit _ + _ X
Implementation Lifecycle					
Name	% Complete	State	Sched Start	Sched Finish	Project Manager
Define Project Ob	0%	Ready	4/10/02	4/12/02	John Smith
Define Initiative	0%	Pending Pr	4/15/02	4/15/02	John Smith
Define/Validate S	0%	Pending Pr	4/16/02	4/16/02	
Implementation	0%	Active	4/17/02	4/23/02	John Smith
Design/Config/Bui	0%	Active	4/24/02	6/13/02	John Smith
<u>System Test</u>	0%	Pending Pr	6/14/02	6/18/02	
Integration Test	0%	Pending Pr	6/19/02	6/20/02	
User Acceptance Test	0%	Pending Pr	6/21/02	6/25/02	
					Project Hierarchy

Click **Project Hierarchy** to go to the Project Hierarchy page.

Viewing Exceptions

The Project Exception Detail portlet displays the Exceptions that have been triggered for the Project being viewed, breaking each triggering Task down according to:

- Exception Type and number of days violated
- Task state, resource, scheduled start and finish
- Project path

This is useful for Participants in that it provides specific context for every Exception in a Project, telling them what Task has gone wrong (or what might go wrong, depending on the Exception Rules enabled), when it went wrong, and where the problem Task is located.

Project Exception Detail					
	Violation	Task State	Scheduled Start	Scheduled Finish	Resource
Critical Path Running Late					
<u>Kintana Release 6.0</u>					
<u>Go Live</u>	Running late	Pending Predecessor	7/10/03	7/10/03	Julie Miles
Commit to Project	Running late	Pending Predecessor	4/24/03	4/24/03	
Late Tasks					
<u>Kintana Release 6.0</u>					
VI. Build	0 days	Pending Predecessor	5/13/03	6/4/03	Arnie Gaetz;Greg Newby
New Task	3 days	In Progress	5/29/03	5/29/03	William Shakleton
New Task	3 days	Ready	5/29/03	5/29/03	
V. Detailed Design	16 days	Pending Predecessor	4/24/03	5/13/03	Bill Gibbs
IV. User Acceptance	29 days	Ready	4/3/03	4/24/03	Mel Fisch
Predecessor Has Exception					
<u>Kintana Release 6.0</u>					
Commit to Project	Predecessors have exceptions	Pending Predecessor	4/24/03	4/24/03	
Tasks Starting Late					
<u>Kintana Release 6.0</u>					
VI. Build	16 days	Pending Predecessor	5/13/03	6/4/03	Arnie Gaetz;Greg Newby
V. Detailed Design	29 days	Pending Predecessor	4/24/03	5/13/03	Bill Gibbs
IV. User Acceptance	44 days	Ready	4/3/03	4/24/03	Mel Fisch
New Task	4 days	Ready	5/29/03	5/29/03	
VII. Test	0 days	Pending Predecessor	6/4/03	6/23/03	Mel Fisch
Unassigned Tasks					
<u>Kintana Release 6.0</u>					
<u>New Task</u>		Ready	5/29/03	5/29/03	

💐 ® Export Data to Excel

Figure 10-5 Project Exception Detail Portlet

Getting to the Exception Details Portlet

The Project Exception Summary portlet in the PROJECT OVERVIEW page contains a link to the Project Exception Detail portlet.

Project Exception Summary	<u>?</u>
Unassigned Tasks	1 Task
	Exception Details

Click **DETAILS** to go to the Project Exception Detail portlet.

Viewing Project References

The Project References portlet in the PROJECT OVERVIEW page displays all entities linked to the Project as References. References (Requests, Packages, Tasks, Projects, Releases, Attachments, and URLs) are listed with details including:

- Reference Type
- Description
- Referenced By

The Project References portlet provides a convenient single point of access for all entities referenced by a Project.

Project References						?- Edit-+-X
Reference	Detail	Status	% Complete	Assigned User	Description	Referenced By
<u>Request 87266</u>	Product Bug	New	0%		Previou	Impleme
<u>Request 87233</u>	Product Bug	New	0%		Install	Design/
					Showing 1	L to 2 of 2: <u>Maximize</u>

Viewing the Project Gantt Chart

The Project Overview Gantt portlet, displayed on the PROJECT OVERVIEW page, shows the Project's Gantt chart including Milestones.

Name	Apr 2003			May 2003				Jun 2003
	W15 W16	W17	W18	W1 9	W20	W21	W22	W23
Sales Integration Project				1				
Project Scoping		-	2					
Round 1 Plan	-	-						
Round 2 Plan	4							
Revise Plans								
Sign-Off		L.	-					
Scope Complete		L.	4/25/03					
Implementation			•					
Level Technology								
Upgrade			4	1.				
Integrate Desktop Mac				-				
Integrate Laptops					La C	1		
Implementation Comp						↓	5/22/03	
Test System								2
Approve Test Plan						-	-	
Test Desktops						L,		
Test Laptops								
Fix Bugs								
Final Test							L.	-
Testing Complete								\$/30/03
Sign-Off								
Project Complete								6/2/

Figure 10-6 Project Overview Gantt portlet

Display criteria for the Gantt chart can be configured by clicking **EDIT**, which opens the portlet's filter page.

Display Options					
 Indicate Progress Indicate Exceptions Show Predecessor Arrows Jadicate Summat Data 	Highlight Critical Path Indicate Summary Condition Show External Predecessor Arrows				
✓ Indicate Current Day □ Show Legend	V Show Name Column				
Text to display as Task labels i	n Gantt: Label display example:				
Display to the left:	Left Label				
Display to the right:					
Display in task tooltip:					

Figure 10-7 Project Overview Gantt portlet filter page - Display Options section

Viewing the Critical Path

The critical path of a Project is made up of the Tasks that define its duration. A Project's critical path can be displayed in the Project Overview Gantt portlet by clicking **EDIT** and selecting the HIGHLIGHT CRITICAL PATH checkbox.

Viewing Project Milestones

Milestones are used to mark significant events in a Project, often the completion of a deliverable or arrival of a deadline. In the Project Overview Gantt portlet, milestones appear as black diamonds.

Milestones are also listed in the Project Milestones portlet, displayed on the PROJECT OVERVIEW page.

Project Milestones					
Name	State	Finish Date	Resource		
Testing Complete	Pending Predecessor	5/30/03			
♦ <u>Scope Complete</u>	Pending Predecessor	4/25/03			
Project Complete	Pending Predecessor	6/2/03	John Smith		
 <u>Implementation</u> <u>Complete</u> 	Pending Predecessor	5/22/03			
		Showing 1 to	4 of 4 : <u>Maximize</u>		

Figure 10-8 Project Milestones portlet

Viewing Resource Information

Resources can view information on their current assignments using the VIEW RESOURCE page. The VIEW RESOURCE page includes a chart of their capacity and a customized Gantt chart illustrating their assignments for the next two weeks.
Project Managers with the proper level of access may also view information on Resources including their Cost rate and workload capacity. *Figure 10-9* illustrates a VIEW RESOURCE as shown to a Manager with access to Cost data.

Pocource Information				Done	
Resource information				Dolle	_
Full Name John :	Smith		Start Date:	4/14/03 End Date:	
First Name: John			Cost Pate: 4	20.00 /bour	
Last Name: Smith			COSC Rate. 4	20.00 /100	
Title:			Capacity:	100 % for workload assignments (50 hou	rs/weel
Email: johns	mith@kintana.com		Department	: Development	
Phone Number			Location:		
			cocación.		
Direct Manager:			Lategory:	Full Time Employee	
Organization Informat	ion.		Skill Profile		
Org Unit Name	Туре	Manager	Skill	Proficiency Level	
IT Special Ops	Group	<u>John Smith</u>	There are cu	rrently no Skills specified.	
Related Actions					
View Organization Model					
		_			
Capacity for the Next	2 Weeks				
Capacity for the Next	2 Weeks				
Capacity for the Next	2 Weeks				
Capacity for the Next	2 Weeks				
Capacity for the Next	2 Weeks				
Capacity for the Next	2 Weeks	04/22 04/23 04	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next Hours 5 0 04/17 04/18 04/	2 Weeks	04/22 04/23 04 Day	4/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next Hours 0 0 04/17 04/18 04/ 0 Utilization 0	2 Weeks	04/22 04/23 04 Day apacity Level	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Copacity for the Next Hours 0 0 04/17 04/18 04/ 0 0 0 04/17 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	2 Weeks	04/22 04/23 04 Day apacity Level	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next	2 Weeks	04/22 04/23 04 Day apacity Level eeks	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next	2 Weeks	04/22 04/23 0 Day apacity Lave I	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next Hours 0 0 04/17 04/18 04/ 0 Utilization 0 Assignments Details for arme	2 Weeks 19 04/20 04/21 verallocation C or the Next 2 W April 2003 18 19	04/22 04/23 0 Day apacity Lavel ecks	1/24 04/25 04/26 23 24 2	04/27 04/28 04/29 04/30 5 26 27 28 29 30	
Capacity for the Next	2 Weeks 19 04/20 04/21 verallocation C pr the Next 2 W April 2003 18 19	04/22 04/23 00 Day apacity Lavel 20 21 22	1/24 04/25 04/26 23 24 2	04/27 04/28 04/29 04/30	
Capacity for the Next Hours 	2 Weeks	04/22 04/23 04 Day apacity Lave I 20 21 22	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next Hours Original Content of the Sector of the Sect	2 Weeks	04/22 04/23 0 Day apacity Lavel 20 21 22	1/24 04/25 04/26	04/27 04/28 04/29 04/30 5 26 27 28 29 30	
Capacity for the Next	2 Weeks	04/22 04/23 0 04/22 04/23 0 Day apacity Lavel 20 21 22 4/21/0:	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next	2 Weeks	04/22 04/23 or Day apacity Lavel	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Copacity for the Next Hours 0 0 0 0 0 0 0 0 0 0 0 0 0	2 Weeks	04/22 04/23 0 Day apacity Lavel 20 21 22 4/21/0	1/24 04/25 04/26	04/27 04/28 04/29 04/30	
Capacity for the Next Hours	2 Weeks	04/22 04/23 0 Day apacity Lawel 20 21 22 4 4/21/0	i/24 04/25 04/26	04/27 04/28 04/29 04/30 04/27 04/28 04/29 04/30 5 26 27 28 29 30 10 10 10 10 10 10 10 10 10 1	

Figure 10-9 View Resource page for a Manager with Cost Access

To open the VIEW RESOURCE page, select **SEARCH -> RESOURCES** from the navigation bar. Enter any search criteria into the SEARCH RESOURCES page and click **SEARCH**.

Updating My Tasks

Kintana Drive makes it easy for Project Participants to report on different aspects of Tasks in multiple levels of detail:

- *Viewing and Updating Task Details* Participants can view their Tasks in detail, updating and saving information such as Task progress, attachments, and action items.
- *Viewing and Updating Multiple Tasks* Multiple Tasks can also be updated simultaneously, with information deemed essential by the Project Manager available to update immediately.

Updating a Task can trigger events in the Project that move it along its path to completion.



A Task in a Project that has predecessor Tasks associated with it cannot be marked **COMPLETE** until its predecessors have been completed, unless a Project Manager attempts it.

Viewing and Updating Task Details

The TASK DETAILS page contains detailed information on multiple aspects of a single Task. Many fields in the TASK DETAILS page are updateable by Project Participants.

To update fields in the TASK DETAILS page:

- 1. Make the update in the desired field.
- 2. Click SAVE.



In order for updates to take effect, the Participant must click **SAVE**. Only then will Drive take into account the updates that have been made.

To clear all changes and reset all fields to their previous values, click **RESET**.

Task Details			
Task Name: Commit to Proj Project Path: <u>Kintana Release</u>	ect Task State: Pending Pro e 6.0 > Commit to Project	edecessor	
Show All Sections Hide All Section	n s		
Exceptions		Save	_
Name	Description	Viola	ition
Predecessor Has Exception	At least one predecessor currently	nning late Runn r has an exception Pred	ing late ecessors have exce
Progress			
*% Complete: 0			
Start Date	Finish Date	Duration	Effort
Scheduled: April 24, 2003	Scheduled: April 24, 2003	Scheduled: 0.0 days	
Actual:	Actual:	Actual: days	Actual: 0.0 hours
🗕 Details			
Resource:	Resource Group:		
Predecessors			
Name	State	Resource	
IV. User Acceptance	Ready	Mel Fisch	
E Costs			
Project Cost Health			
No costs information can be shown. costs. If you believe this is a mistak	This is because the Project Settings f e, please check with the Project Man	or this Project is set to not show any ager.	actual, planned and baseline
Action Items			
Description		Status Priority	Required
There are currently no action items.			-
New Action Item:		Open 💌 Normal 🗸	
– Notes			
Notes to be added on save:			
		∇	
References Reference Additions			
New Reference: Attachment	add		
References to be added on Save	e:		
	Open Remove		
		Cauge Decet	

Figure 10-10 Task Details Page

Getting to the Task Details Page

A relevant Task must first be located in order to get to its DETAILS page and update its information. There are several ways for Participants to locate and view details for any Tasks that might require their attention:

- "Searching for Tasks and Projects" on page 224
- "Finding Tasks Using the My Tasks Portlet" on page 228

• "Finding Tasks Using Notifications" on page 228

Any Task's DETAILS page can also be reached from the PROJECT HIERARCHY page. See *"Viewing Project Hierarchy"* on page 236 for more detailed information.

Viewing and Updating Multiple Tasks

Sometimes it may be necessary for a Project Participant to only update a specific Task detail, such as the TASK STATE or % COMPLETE. The My Tasks portlet is perfectly suited to this need, and has the added advantage of being able to show multiple Tasks at once.

The fields collected by the portlet can be configured by Project Managers. See *"Selecting Information to Track and Display"* on page 61 for details.

The My Tasks portlet displays information for multiple Tasks. The maximum number of Tasks displayed can be specified by the user, as well as the portlet title. Most fields in the My Tasks portlet are updateable by Project Participants.

To update fields in the My Tasks portlet:

- 1. Make the update in the desired field.
- 2. Click SAVE.



In order for updates to take effect, the Participant must click **SAVE**. Only then will Drive take into account the updates that have been made.

To clear all changes and reset all fields to their previous values, click RESET.

My Tasks			<u>?</u> _Edit - + _ X
John Smith's ta	sks scheduled to finish	on or before April 25, 2002	
Define Project	Objectives Implement	<u>ation Lifecycle</u> ≻ Define Project Objective	25
Task State:	Ready 💌	Sched Start: 4/10/02	Sched Finish: 4/12/02
*% Complete:	0		
-			
<u>Define Initiativ</u>	e Constraints Implem	<u>entation Lifecγcle</u> > Define Initiative Con	ostraints
Task State:	Pending Predecessor	Sched Start: 4/15/02	Sched Finish: 4/15/02
*% Complete:	0		
			Save Reset
			Showing 1 to 2 of 2 : <u>Maximize</u>

Figure 10-11 My Tasks Portlet

Getting to the My Tasks Portlet

The My Tasks portlet is defaulted to display on a Project Participant's Homepage. The Homepage can be reached at any time by selecting **DASHBOARD** -> MY PAGES -> FRONT PAGE from the navigation bar at left.

Viewing and Adding Notes

Notes are available for viewing and editing in the TASK DETAILS page. See *"Viewing and Updating Task Details"* on page 242 for information on the TASK DETAILS page.

To create a new Note:

- 1. Get to the DETAILS page of the Task you wish to update.
- 2. Type the new note into the NEW NOTE text field.
- 3. Click SAVE.

Viewing and Modifying References

Kintana features a number of methods for capturing additional information, or References, related to your Projects. Tasks can include references to other entities or points of information, allowing easy access and visibility to data related to the current Project. The following References can be attached to a Kintana Drive Task:

- Requests
- Packages
- URLs
- Attachments (anything that can be placed on a server: PDF files, JPEG images, Java .class files, etc.)
- Tasks
- Projects
- Releases (referenced from the Workbench only)

References are attached from the Task Details page. References can be added and modified using both the Kintana interface and the Kintana Workbench. The following sections provide instructions for adding, modifying and deleting references using the Kintana interface:

- Adding References to Tasks
- Viewing and Editing References
- Deleting References

Adding References to Tasks

You can reference a Web accessible file or attach a file from your local machine to the current Task. You can also reference an existing Kintana entity (Request, Package, Project, or Task).

To attach References to a Task:

- 1. Open the TASK DETAILS page using one of the following methods:
 - Search for and open the Task directly using the SEARCH -> TASKS menu option.
 - Query and open an existing Project using the **SEARCH -> PROJECTS** menu option. Locate the Task within the Project and open the TASK DETAILS page.
- 2. Scroll down to the **REFERENCES** section of the page.
- 3. Select a Reference type from the NEW REFERENCE drop down list.
- 4. Click ADD. A page corresponding to the selected Reference type opens. Enter the Reference on this page. For certain Reference types, you have the option of searching for a Reference.
- 5. Attach the Reference.
- 6. Click **SAVE** on the TASK DETAILS page.

You can attach different types of References to your Task. See the following sections for instructions on referencing different entities.

- Attaching Existing Kintana Entities
- Attaching New Requests

- Attaching Files
- Attaching URLs

Attaching Existing Kintana Entities

You can attach an existing Kintana entity (Request, Package, Project, or Task) to a Task. To attach an existing Kintana entity to a Task:

1. Navigate to the Task Details page and scroll down to the **REFERENCES** section.

_	
-	References
	Reference Additions
	New Reference: Attachment 💽 Add
	References to be added on Save:
	Open Remove
	Save Reset

2. Select ENTITY (EXISTING) ("ENTITY" can be Task, Project, Request (Existing), Request (New), Package (New), or Package) to be added from the NEW REFERENCE drop down list.

 References Reference Additi 	ions				
New Reference:	Attachment 💽	Add			
References to be	Attachment Package (Existing) Package (New) Project Request (Existing) Request (New) Task URL	Open	Remove		
				Save	Reset

- 3. Click ADD. A page opens presenting search criteria for the Request, Package, Release, Project, or Task to be referenced.
- 4. Enter the appropriate information and click **SEARCH**. A page opens presenting search results.

<u>و</u> د	ΝΤΛΝΛ				Welcome John Smith
Add Requ	Referenc Iest	e:			
*Relatio	nship for Sel	ected Requests:	•		
Reques	t Search Re	sults			
					Showing 2 Results
	Req #	Request Type	Status	Last Updated	Description
	87266	Product Bug	New	April 11, 2002	Previous versions don't work with Opera
	87233	Product Bug	New	April 10, 2002	Installer appears to hang
Check A	All Clear All				Showing 2 Results
				Add	Modify Search Cancel
Copyright ©	2002 Kintana				

- 5. Select the check box next to the entity or entities to be referenced. To check all boxes, click **CHECK ALL**. To uncheck all boxes, click **CLEAR ALL**.
- 6. Select a relationship for the referenced entities from the drop down list at the top of the page. For a complete list of all Reference relationships, see *"Dependency Relationships"* on page 145.
- 7. Click Add.
- 8. The referenced entities appear in the REFERENCES TO BE ADDED ON SAVE list on the TASK DETAILS page. *The References have not been added yet*.
- 9. Click **SAVE** to add the References to the Task.

Attaching New Requests

A new Request can be created from the References section of the Task Detail page.

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

W KINTAN	1.4		Welcome John Smith
Create New R	auect		
*Request Type:	Enhancement Enhancement Request type		
*Relationship:	Contained in this Task v Contained in this Task: Referenced Request is contained in this Task		
		Create	Cancel
Copyright © 2002 Kin	tana		

- 2. Choose the Request Type that you want to generate from the REQUEST TYPE drop down list in the CREATE NEW REQUEST section. A description of each Request Type displays below the list. To save time, the most recently created Request Types will be first on the list.
- 3. Select the relationship for the new Request from the RELATIONSHIP drop down list.
- 4. Click **Create**.
- 5. Enter the information related to your new Request in the CREATE NEW REQUEST page. Required fields are displayed in red. If you would like to make additional comments on the Request, enter them in the NOTES field.
- 6. Save and submit the new Request.
- 7. The referenced Request appears in the REFERENCES TO BE ADDED ON SAVE list on the TASK DETAILS page. *The Reference has not been added yet*.
- 8. Click **SAVE** to add the Reference to the Task

Attaching Files

To add a file as a Reference:

1. Navigate to the Task's DETAILS page and scroll down to the **REFERENCES** section.

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

W KINTANA	Welcome John Smith
Reference Attachme	
*Attachment:	Browse
Description:	
	OK Cancel
Copyright © 2002 Kintana	

- 3. Select the desired file from your local machine and enter a description if desired.
- 4. Click ADD to add the selected Attachment as a Reference.
- 5. The referenced Attachment appears in the REFERENCES TO BE ADDED ON SAVE list on the TASK DETAILS page. The Reference is not added until **SAVE** is clicked.
- 6. Click **SAVE** to add the Attachment to the Task.

Attaching URLs

To add a URL as a Reference:

- 1. Navigate to the TASK DETAILS page and scroll down to the **REFERENCES** section.
- 2. Select **URL** from the NEW REFERENCE drop down list and click **ADD**. The REFERENCE URL page opens.

W KINTANA	Welcome John Smith
Reference URL	
*URL:	View URL
Description:	
	OK Cancel
Copyright © 2002 Kintana	

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

Viewing and Editing References

You can view the References that have been linked to a Task. The References are listed in the **REFERENCES** section of the TASK DETAILS page. To view the References currently linked to the Task:

- 1. Open the TASK DETAILS page.
- 2. Scroll down to the **REFERENCES** section. Expand and collapse sections by clicking the + and icons to view additional details.
- 3. Click on the name of the Reference you wish to view.
 - If the Reference is a URL, it opens inside your Web browser.
 - If the Reference is a file of any other kind, it is handled by your Web browser in the usual fashion, either opening directly or asking to be saved to your local machine.
 - If the Reference is a Project, its PROJECT OVERVIEW page opens, displaying summary information related to that particular Project.

Note

• If the Reference is another Kintana entity (Request, Package, or Task) it will open the entity's DETAILS page.

If you have a license for Kintana Create and Kintana Deliver, you can click the Request or Package to access their detail pages. You can then update those entities according to normal Kintana operation. See "*Processing Requests*" and "*Processing Packages*" for more information.

If you have permission to edit the Task, you can modify the Task's References. In addition to adding new References, you can delete and change the Relationships of existing references. The following figure illustrates the functionality related to References.

Lists current	References								
References	🗕 Reque	sts							
References.	Req #	Request Type	Status	Priority	Assigned User	Description		Relationship	
Click X to remove the Reference.	x <u>87233</u> Reference	Product Bug	New			Installer appears to I	hang	Related to this Task	•
Add new References.	New Refer Reference	ence: Attachm s to be added o	nent v on Save:	Add (
Select a new Relationship from the drop down list.				Open	Remove				
						Save	Reset		
Click Save to save — your changes.									

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 Refere	nces				? _ Edit _ +
Reference	Detail	Status	% Assigned Complete User	Description	Referenced By
<u>Request 87266</u>	Product Bug	New	0%	Previou	Impleme
<u>Request 87233</u>	Product Bug	New	0%	Install	<u>Design/</u>
				Showing	1 to 2 of 2: <u>Maxim</u>

Deleting References

If you have permission to edit the Task, you can delete the Task's References. To delete a Task Reference:

- 1. Navigate to the TASK DETAILS page and scroll down to the **REFERENCES** section.
- 2. Click the **X** to the left of the Reference. A message will appear asking you to confirm the deletion.
- 3. Click YES.

The Reference is removed from the Task.

	Reference	es					
	🗕 Requ	ests					
Click V to romava	Req #	Request Type	Status	Priority	Assigned User	Description	Relationship
Click A to remove	X 87233	Product Bug	New			Installer appears to hang	Related to this Task 🔹
the Reference.	Referenc	e Additions					
	New Refe Reference	rence: Attachmes to be added	nent <u>-</u> on Save:	Add			
	,			Open	Remove		
						Save	leset

Visibility Between Projects and Programs

The Kintana Program Management Office Solution provides a way for managers to link multiple Projects together as Programs, and to submit and track Requests against them.

Organizations implement a Program Management Office in order to:

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

Programs can be tracked and analyzed with the same kind of familiar Cost metrics as Projects. See "*PMO User Guide*" for more detailed information on Program/Project visibility.

Viewing Reports

You can run reports on your Kintana Drive information from the **REPORTS** menu group in the navigation bar.

To run a Kintana Drive report:

1. From the **REPORTS** menu group in the navigation bar, select **PROJECT REPORTS**. The AVAILABLE REPORTS page opens.

Available Reports						
Reports						
<u>Project Custom Detail Report</u> View selected details of one or more projects with project types. Dis column for each selected project header field and custom field.	Project Custom Detail Report View selected details of one or more projects with project types. Displays a table with a column for each selected project header field and custom field.					
<u>Project Detail Report</u> View the details of one or more projects, filtered by header field values. Report detail based on user selection, including custom fields, notes, activities, references, etc.	rts a variable level of					
<u>Project Detail Report (Filter by Custom Fields)</u> Audit the details of one or more projects, which or project type's custom field values. Includes header and detail information, notes, and status for each	an be filtered by a n selected project.					
<u>Project Exception Detail Report</u> View the details of tasks that need special attention by a project that are in an exception state; i.e. past due, started late, delayed, unassigned, etc.	manager. Lists tasks					
<u>Project Resource Report</u> Audit all resources working on a project, and the tasks that each resourc Provides a project manager with a high-level view of resource load and availability.	e is working on.					
Project Status Detail Report Audit the status of all parameters and parameter details for items in one or more projects. Allows a project manager to drill into the detailed status of projects requiring their attention.						
Project Status Report View the status of one or more projects. Can be used to indicate project tasks requiring special attention, as well as for general informational reporting purposes.						
Project Summary Report View a brief summary of all projects meeting the reporting criteria. Presents a table format for quick browsing.						
Project Type Detail Report View the configuration details of one or more project types. Includes detailed information about each field associated with selected project types. Also useful for debugging technical project problems.						
DSS Reports						
Pending Project Tasks (DSS) DSS - List all project tasks that are passed due, per time unit (days, Helps identify stalled or delayed tasks.	weeks, or months).					
Project Cycle Time Distribution (DSS) DSS - Chart a distribution of project cycle times in user-specified time buckets (specified in days). Useful in tracking project cycle times, and for identifying aberrant data.						
Projects Completed by Period (DSS) DSS - Chart the number of projects completed per time unit (week, month, or year) over a specified time span. Helps to identify overall throughput and longer-term time trends in activity.						
Projects by Type (DSS) DSS - List projects categorized by a selected grouping type.						
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2. 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.

					Close W	'indow 🗵
Project Custom Det	ail Report					
*Project Template:	1	IE	Project Fields:			E
Project Name:		:=	Custom Fields:			IE
Project #:			Project Manager:			IE
Sched Start Date From:		2	Sched Start Date To:			2
Sched Finish Date From:		2	Sched Finish Date To:			2
Project States:		IE	Department:			i=
Created By:		ΙΞ	Order By:			IE
Show Master Projects Only:	⊙ Yes O No					
			Show Report Parameters:	⊙ _{Yes} (O No	
					Restore Defau	lt
			Sub	mit	Cancel	
					Close W	'indow 🗙

This example of a Report creation page shows the required and optional fields for the Project Custom Detail 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. See *"Submitting a Report from the Kintana Interface"* on page 261 for more information.

- 3. Enter information in the Report creation page's required fields.
- 4. Enter any information in the Report creation page's optional fields.
- 5. Click Submit.

The REPORT SUBMITTED page opens and displays the Report contents in a new window.



The Reports available in Kintana Drive provide up-to-the-moment information about your Projects. This information includes:

- Current detailed status
- Summaries of exceptions
- Resources
- Configuration

Additionally, Kintana's Decision Support System (DSS) provides a high level overview of your project management system through graphical summary reports.

This chapter describes the following topics related to submitting and viewing reports in Kintana Drive:

- Submitting a Report from the Workbench Interface
- Submitting a Report from the Kintana Interface
- Viewing Previously Submitted Reports
- Decision Support System (DSS) Reports
- Standard Kintana Drive Reports (Non-DSS)
- Standard Kintana Drive DSS Reports

Submitting a Report from the Workbench Interface

To submit a Report from the Kintana Drive Workbench:

- 1. In the Kintana Workbench, click the **DRIVE** screen group and either the REPORTS or DSS REPORTS screen. The REPORT SUBMISSION WORKBENCH window opens.
- 2. Click **NEW REPORT** in the **QUERY** tab or **NEW** in the **RESULTS** tab. The NEW REPORT SUBMISSION window opens.

Status:	III	Report Number:		Requested By: admin	
Report Type: Work	(flow Detail Repor				
Workflow From:					
Workflow To:					
Show Valid Results:	C Yes		No		
Show Transitions:	C Yes		No		
Show Security?	C Yes		No		
Show Notifications?	C Yes		No		

3. Select the Report Type desired from the REPORT TYPE auto-complete list. Report-specific parameters appear at the bottom of the tab.

👰 Compare Custom Da	atabase Set	up [30150]				-		_ 🗆 ×
Parameters Scheduling	Notifications	1						
Status: New	III	Report Num	ber: 301	150	Req	uested	By: admin	
Report Type: Compare	Custom Datab	ase Setup						
Comparison Name:								
Reference Environment:	DEV Env A	T - Harris		Compared Enviro	nment:	DCL:	: Dev	
Reference AppCode:				Compared App	Code:			
Only Report Differences:	C Yes	🖲 No						
Object 1:				Object 1	Filter:			
Object 2:			III	Object 2	2 Filter:			
Object 3:			H	Object 3	3 Filter:			
Object 4:			H	Object 4	1 Filter:			
Object 5:			H	Object 5	5 Filter:			
View Report Vie	w Log					ОК	Submit	Cancel
Ready (Read-Only)								

4. Enter information in the required fields and any other fields you would like to use for your report.

- 5. (Optional) Click on the **SCHEDULING** tab and enter the time at which you would like the Report to run. If no scheduling information is entered, the report runs immediately. See "*Using the Scheduling Tab*" on page 259 for more detailed information.
- 6. (Optional) Enter the frequency with which you would like the report to be re-run.
- 7. (Optional) Click on the **NOTIFICATIONS** tab and click **NEW**. Select any users you would like informed of the Report results. For more information on adding new recipients, refer to "*Using the Notifications Tab*" on page 260.
- 8. Click OK.
- 9. Click **SUBMIT** to run the Report.
- 10. Click **VIEW REPORT** when the Report finishes running.

The Report output displays in your Web browser.



If you do not have permission to submit a report, contact your Kintana System Administrator.

Using the Scheduling Tab

The **SCHEDULING** tab is used to determine when a Report runs. Reports can be run immediately or scheduled to run at a later time. You can also schedule reports to run periodically by selecting the Repeat Periodically check box. When you select this check box, fields for specifying the repeat interval are enabled under RECURRENCE INFORMATION.

The REPEAT UNTIL DATE field specifies the date after which the Report will no longer be run. The REPEAT INTERVAL field specifies how frequently the report will run, based upon the time unit specified in the drop down list following the field.

For example, if you want to schedule a report to run every three days for one month:

- 1. Enter the date one month in the future in the REPEAT UNTIL DATE field.
- 2. Enter **3** in the REPEAT INTERVAL field.
- 3. Select **Days** from the drop down list.

New Report S Parameters Scher	ubmission duling Notifications					
		Scheduling Inforr	mation			
Execution Date:	December 4, 2001					
Execution Time:	104:56:26 AM GMT+05:30					16
Repeat Periodically						
		Recurrence Infor	mation			
Repeat Until Date:	January 4, 2002					1
Repeat Until Time:	04:56:27 AM GMT+05:30					Ē.
Repeat Interval:	3		Days	-		
View Report	View Log			OK	Submit	Cancel

Figure 11-1 New Report Submission Scheduling Tab

Using the Notifications Tab

To specify recipients for the Report:

1. Click New. The Add Notification for Report Submission window opens.

Add Notification for Report Submission: null	×
Setup Message	
Options	
Description:	
Event ALL	
Interval: 8:00 AM Daily M-F	
Enabled: 🖸 Yes 🔿 No 📃 De	on't send if obsolete
Recipients	
Recipient Type Distribution Type	Recipient
New Edit Delete	
	·
Tokens	OK Cancel
Ready	

- 2. In the **SETUP** tab, enter information in the required fields.
- 3. If you want to add a new user to the Recipients, click **New**. The ADD NEW RECIPIENT window opens.

Add	Nev	v Recipi	ent	>		
۲	To	O Co	C Bcc	Enter a Username		
	Username: IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII					
Rea	Foke idy	ns		OK Add Cancel		

- 4. Enter information in the required fields and click **ADD** to add the new recipient. Click **OK** to return to the ADD NOTIFICATION SETUP. Click **CANCEL** to return to the ADD NOTIFICATION SETUP without saving any changes.
- 5. (Optional) In the ADD NOTIFICATION SETUP dialog you can use the **EDIT** and **DELETE** buttons to modify the list of recipients. Click **TOKEN** to view the available tokens.
- 6. (Optional) Click the **MESSAGE** tab in the ADD NOTIFICATION SETUP if you want to view and edit the Message Notification Template.
- 7. Click **OK** to close the window.

The email will be sent to the recipients specified in the ADD NEW RECIPIENT window.

Submitting a Report from the Kintana Interface

Standard Kintana Drive Reports, both DSS and Non-DSS, can be run from the Kintana interface.

To run a Report from the Kintana interface:

1. From the navigation bar at left, select **REPORTS -> PROJECT REPORTS** from the main menu. The AVAILABLE REPORTS page opens.

Available Reports	
Reports	
Project Custom Detail Report View selected details of one or more projects with project types. Dis column for each selected project header field and custom field.	splays a table with a
Project Detail Report View the details of one or more projects, filtered by header field values. Report detail based on user selection, including custom fields, notes, activities, references, etc.	rts a variable level of
Project Detail Report (Filter by Custom Fields) Audit the details of one or more projects, which or project type's custom field values. Includes header and detail information, notes, and status for each	an be filtered by a h selected project.
Project Exception Detail Report View the details of tasks that need special attention by a project that are in an exception state; i.e. past due, started late, delayed, unassigned, etc.	manager. Lists tasks
<u>Project Resource Report</u> Audit all resources working on a project, and the tasks that each resourc Provides a project manager with a high-level view of resource load and availability.	e is working on.
Project Status Detail Report Allows a project manager to drill into the detailed status of projects requiring their attention.	one or more projects.
<u>Project Status Report</u> View the status of one or more projects. Can be used to indicate project ta attention, as well as for general informational reporting purposes.	sks requiring special
Project Summary Report View a brief summary of all projects meeting the reporting criteria. Preser quick browsing.	nts a table format for
Project Type Detail Report View the configuration details of one or more project types. Includes de about each field associated with selected project types. Also useful for debugging technical project	etailed information problems.
DSS Reports	
Pending Project Tasks (DSS) DSS - List all project tasks that are passed due, per time unit (days, Helps identify stalled or delayed tasks.	weeks, or months).
Project Cycle Time Distribution (DSS) DSS - Chart a distribution of project cycle times in user-spi (specified in days). Useful in tracking project cycle times, and for identifying aberrant data.	ecified time buckets
Projects Completed by Period (DSS) DSS - Chart the number of projects completed per time unit over a specified time span. Helps to identify overall throughput and longer-term time trends in activit	(week, month, or year) ;y.
Projects by Type (DSS) DSS - List projects categorized by a selected grouping type.	
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2. 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 AVAILABLE REPORTS page. The Report's creation page opens.

				Close Wind	low 🗙
Project Custom Det	ail Report				
*Project Template:		≣	Project Fields:		E
Project Name:		≣	Custom Fields:		E
Project #:			Project Manager:		E
Sched Start Date From:		9	Sched Start Date To:		9
Sched Finish Date From:		9 <u>1</u>	Sched Finish Date To:		9
Project States:		:=	Department:		Ξ
Created By:			Order By:		E
Show Master Projects Only:	⊙Yes CNo				
			Show Report Parameters:	⊙ Yes O No	
				Restore Default	
			Sub	mit Cancel	
				Close Wine	low 🗵

This example of a Report creation page shows the required and optional fields for the Project Custom Detail 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.

- 3. Enter information in the Report creation page's required fields.
- 4. Enter information in the Report creation page's optional fields.
- 5. Click Submit.

The REPORT SUBMITTED page opens and displays the Report content in a new browser window.

Viewing Previously Submitted Reports

Previously submitted reports can be viewed from the Workbench or Kintana interface in the following ways:

- "Viewing Reports From the Workbench" on page 263
- "Viewing Reports From the Kintana Interface" on page 264

Viewing Reports From the Workbench

To view previously submitted reports in the Workbench interface:

- 1. Enter search criteria in the QUERY tab of the REPORT SUBMISSION WORKBENCH.
- 2. Click LIST. All matching Report Submissions will be listed in the RESULTS tab.
 - To view the submission details used for the Report, click **OPEN**.
 - To view the Report output, click **VIEW REPORT**, or double-click on the desired Report.



It is not possible to modify the values used for a previous Report Submission. However, from the **RESULTS** tab of the REPORT SUBMISSION WORKBENCH you can highlight a particular Report Submission and click **COPY**. This makes an exact duplicate of the Report Submission. The duplicate report can be modified and submitted.

Viewing Reports From the Kintana Interface

To view previously submitted reports in the Kintana interface:

- 1. From the navigation bar at left, select **SEARCH -> REPORTS**. The REPORT SEARCH page opens.
- 2. Enter search criteria in the fields under SEARCH INFORMATION.
- 3. Click **SEARCH**. All reports that match your criteria display on the REPORT SEARCH RESULTS page.
- 4. To view the Report output, click the desired Report.

The Report output displays in your Web browser.

Decision Support System (DSS) Reports

Kintana's Decision Support System is a powerful extension to Kintana Drive 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 decisions. Examples of the data analysis capabilities include the following:

- **Bottleneck Reporting:** Identify steps within a Workflow that require the most attention due to an imbalance in resources or operational inefficiencies. View aging information to see the average time a Project 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 Projects 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 based on the transaction data captured by Kintana Drive.

Key features of the Decision Support System include:

- Real-time graphical reporting in a Web interface.
- Access to the summarized and detailed data behind each graphical report.

• Ability to export the data in a text format that is easily imported into Excel.

Understanding the Reports

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

Graphical Data Representation

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

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

An example of graphical report output is shown in *Figure 11-2* below.



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

<u>Summary Data HTML File</u> <u>Summary Data Text File</u>

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



Textual Data

All of 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. The 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 displayed.

Standard Kintana Drive Reports (Non-DSS)

A complete list of Kintana Reports, including details for parameters in each report, are in *"Kintana Reports"*. To access these Reports, click the **DRIVE** screen group and click the REPORTS icon. *Table 11-1* lists the Reports available and provides a brief description of each.

Report	Description
Project Schedule Change Report	Compares the current Project schedule to that of a baseline, or baselines to each other.
Project Critical Path Report	Lists the Tasks that make up a Project's critical path.
Notification History Report	Lists notifications that have been sent or are pending.
Portlet Detail Report	Returns the definitions of selected Portlets, including columns, filter fields, access security, 'used by,' and the Portlets' full SQL query.
Project Custom Detail Report	Lists only the specified columns from the header fields and custom field parameters in HTML table format.
Project Detail Report	Provides the details of each Project.
Project Detail (Filter by Custom Fields) Report	This report is similar to the Project Detail Report. The only difference is the report can filter by custom fields.
Project Exception Detail Report	Lists all the task details for the tasks that have triggered Exceptions and need attention by a Project Manager.
Project Resource Report	Lists all the resources working on a project and the tasks that the resources are working on.
Project Status Detail Report	A summary of Project statuses of selected Projects and Tasks.
Project Task Assignment Report	Shows which users or groups have been assigned to the Tasks for a given Project.
Project Summary Report	Provides a summary of all the Projects that meet criteria entered in the header fields.
Project Template Detail Report	Lists the parameters and parameter details for every Project Template.
Report Type Detail Report	Lists the parameters and parameter details for each Report Type as well as the commands used to run the Report.
Resource Availability Report	Provides a high level view of the availability of Resources in Drive.

Table 11-1. Available Non-DSS Reports

Security Group Detail Report	Lists the set-up information for a single Security Group or a group of Security Groups. It also lists which users belong to the group and what Workflow Steps the Security Group has access to.
User Data Detail Report	Lists the definition of each entity user data.
User Detail Report	Lists the users defined in your Kintana system, as well as the Security Groups attached to each user.
Validation Report	A System Administration report on the various custom Validations entered into the system or that are standard with Kintana products.

Table 11-1. Available Non-DSS Reports

Standard Kintana Drive DSS Reports

A complete list of Kintana Reports, including details for parameters in each report, are in *"Kintana Reports"*. To access these Reports, click the DRIVE screen group and click the DSS REPORTS icon. In the Kintana Interface, standard Reports can be accessed by selecting **REPORTS -> PROJECT REPORTS** from the navigation bar. *Table 11-2* lists the DSS Reports available and provides a brief description of each.

Table 11-2. Available DSS Reports

Report	Description
Pending Tasks	Lists all the grouped Tasks that are past due, categorized by the selected Period Type. The Period Type can be day, week or month. Start and End Dates can also be specified for this report.
Projects By Type	Lists the Projects categorized by the Grouping Type you select (such as Application or Department).
Project Completed By Period	Lists the number of Projects that have been closed or canceled per time unit (week, month or year) over a specified time span. Users have the option of specifying a particular Workflow, or compiling composite data for all Workflows.
Project Cycle Time Distribution	Displays the distribution of Project cycle times in user-specified time buckets. The time bucket duration is specified in days.

Chapter 122 Integrating Kintana Drive with Microsoft Project

The Kintana Drive - Microsoft Project interface allows Project Managers to import project information from Microsoft Project to a new Kintana Drive project. Project information can also be exported from Kintana Drive to Microsoft Project, creating a new project in Microsoft Project. Projects that have been imported or exported can be synchronized. Any information that is shared between projects in both applications is updated during synchronization.

Kintana Drive has three different synchronization modes that a Project Manager can choose from. The various synchronization modes let the Project Manager use different strategies for importing/exporting information between Drive and Microsoft Project.

By importing, exporting and synchronizing information between Kintana Drive and Microsoft Project, you have the advantage of using the "best of both possible worlds." Depending on your project management strategy, you can use one application to perform all planning and tracking activities, and then use the other for publishing project information to managers, participants and stakeholders. See "*Project Management Strategies*" on page 271 for more information about different project management strategies.



The Kintana Drive - Microsoft Project interface is only compatible with Microsoft Project 98 and 2000, North American localization. It is not compatible with earlier versions of Microsoft Project such as Project Central.

Synchronization Modes

The Project Manager can select from three synchronization modes for importing/exporting information between Drive and Microsoft Project. Each mode offers a different strategy for communication between the two applications and has its own set of advantages. The three modes are:

- Kintana Drive controlled
- Microsoft Project controlled
- Kintana Drive controls actuals

Kintana Drive controlled

The Project Manager initially creates a project in Drive to perform planning and tracking activities. These activities include defining the project, scheduling tasks and tracking actuals. The first time the project is synchronized, Kintana creates a new project file on the Project Manager's desktop computer. For each subsequent synchronization, all of the information in the Microsoft Project project that is also contained in the Drive project is replaced with the current information in Drive. Other information in the Microsoft Project (custom fields, resource cost rates, etc.) is not altered.

After exporting, the Project Manager can distribute the Microsoft Project file or use it to run reports for managers and other people in the organization.

Microsoft Project controlled

The Project Manager creates a project in Microsoft Project to perform project planning and tracking activities and then synchronizes it in the Kintana Workbench. The synchronized Drive Project automatically rolls up into the Kintana Dashboard. Also, participants can create references from tasks in the synchronized project to other Kintana information (Requests and Packages). These references can provide information back to the Project Manager, or can automatically inform external participants of project events they are monitoring.

For all subsequent synchronizations, information in Drive is updated with current information from Microsoft Project.

Kintana Drive controls actuals

The Project Manager plans and schedules the project in Microsoft Project while using Drive to track actuals. Participants in the project directly report actuals data using the Task Update portlet in the Kintana HTML interface. Each subsequent synchronization updates the Microsoft Project file with actuals data from Drive. The Drive project is updated with changes to the project structure or schedule in Microsoft Project.

See *"Synchronizing Microsoft Project and Drive"* on page 285 for more information about synchronization.

Project Management Strategies

The following scenarios demonstrate how Project Managers can use different project management strategies offered by the Kintana Drive - Microsoft Project interface.

- Converting a Microsoft Project File to a Drive Project Overview
- Publishing a Drive Project through Microsoft Project
- Publishing a Microsoft Project File through Drive
- Using Drive to Track Actuals in Microsoft Project

Converting a Microsoft Project File to a Drive Project - Overview

A Project Manager who has previously used Microsoft Project but is adopting Drive can use the interface to convert a Microsoft Project project to a Drive project. Conversion is a one-time action, but the Project Manager may want to keep the Microsoft Project project and the Drive project synchronized after conversion.

To convert a Microsoft Project file to a Drive project:

- 1. Save the Microsoft Project project to a local file on your computer.
- 2. Open the Kintana Workbench and start an import from the Drive Project window.
- 3. Follow the instructions from the Import Wizard. (See "*Importing from Microsoft Project*" on page 280 for detailed instructions.)
 - a. Browse for the Microsoft Project project file.
 - b. Enter additional information about the new Project in the Wizard as you go through the steps of the Import.

When the Import Wizard completes the procedure, the Project Manager can see the new project in Drive and can decide whether or not to save the project. The Microsoft Project project has been updated with hyperlinks to the related pages in the Kintana interface. The Project Manager can decide whether to save these changes also. Both projects will have unsaved changes.

Initially, the Project Manager may want to keep the project under the control of Microsoft Project, and periodically synchronize the Kintana Drive project with Microsoft Project information. (See "*Publishing a Microsoft Project File through Drive*" on page 273 for more information about synchronizing projects.) This allows the Project Manager to see how the project is presented in Kintana. Later, when the Project Manager is more comfortable with Drive, the Project Manager can change to the Kintana Drive controlled mode, and may decide to stop synchronizing the project with Microsoft Project entirely.

Publishing a Drive Project through Microsoft Project

A Project Manager who uses Drive to manage projects can use the Kintana Drive - Microsoft Project interface to publish the projects. Publishing may simply mean distributing the Microsoft Project project file to external audiences (such as a PMO group). Publishing could also mean synchronizing the Microsoft Project project file with Kintana, and then running Microsoft Project reports for distribution. The projects may be published on a regular basis (weekly or quarterly) or at defined milestones (such as design completion).

To publish a Drive project through Microsoft Project:

- 1. Open the project to be exported in Kintana Workbench.
- 2. Export the project into a new Microsoft Project project file. (See *"Exporting to Microsoft Project from Drive"* on page 276 for detailed instructions.)

Since a project created in Drive defaults to the synchronization settings for Kintana Drive controlled mode, the Project Manager will probably not need to change any project settings.

3. A new Microsoft Project project is created and opens. You can then save the project and run reports as usual.

After the first export, you will synchronize the Drive project with the Microsoft Project project. This will effectively overwrite shared information, but will not affect additional information in the Microsoft Project project that is added manually after the export has occurred (such as a baseline).



If you want to export a new project each time, the Project Manager can simply rename the Microsoft Project file on the computer before clicking the **Synch** button, which causes Drive to export into a new file.

Publishing a Microsoft Project File through Drive

A Project Manager who uses Microsoft Project to manage projects can publish those Projects using Kintana Drive. Publishing means loading the project data into the Kintana repository, which has the following benefits:

- The Project Status appears in the Kintana Dashboard. Drive calculates exceptions and stoplight status (red/yellow/green) based on the project settings on the Drive project.
- Project participants and external audiences can see the project in various interfaces such as the My Tasks portlet and the search screens. Although these participants cannot use Kintana Drive to update Project Status, this is an effective way to increase visibility of project information through the Kintana HTML interface.
- Kintana users can create references from other Kintana information (such as Requests and Packages) to tasks in the synchronized project. These references could be used to monitor the state of a particular task, and block progress on a Request or Package until the predecessor task is complete.

The Project Manager is likely to publish the project to Drive on a regular basis. The Project Manager's actions are identical to the scenario described in *Publishing a Drive Project through Microsoft Project*, except that synchronization is left in Microsoft Project controlled mode for all shared project data.

Using Drive to Track Actuals in Microsoft Project

A Project Manager who uses Microsoft Project to plan and manage projects can use Drive to collect actuals from participants. In addition to the benefits described in *Publishing a Microsoft Project File through Drive*, this integration shifts some of the effort of collecting and entering actuals information from the Project Manager to the participants. The Project Manager will need to periodically synchronize the projects, either to publish a replanned project to Drive or to collect new actuals updates into Microsoft Project.

To use Drive to track actuals from Microsoft Project:

- 1. Import the Microsoft Project project into Drive.
- 2. During the import, select the 'Kintana Drive controls actuals' synchronization mode. Initially, the Drive project is identical to the Microsoft Project project. After the import, participants or the Project Manager can enter actuals information into Drive.
- 3. The Project Manager synchronizes the two projects, and the Microsoft Project file is updated with the new actuals in Drive. This causes some changes to schedule dates in the Microsoft Project project. For example, an actual start date entered into Kintana Drive will overwrite a scheduled start date in Microsoft Project.

The Drive Project is updated to match the project structure and schedule information of the modified Microsoft Project project. Both Projects are shown to the Project Manager in their respective applications, and the Project Manager can choose whether to save either or both projects. If necessary, the Project Manager can adjust the Microsoft Project project. This may mean shifting assignments, changing schedule dates (using the Microsoft Project resource leveling feature), or other changes. The Project Manager saves the changed Microsoft Project project and synchronizes it with Drive a second time to publish these schedule changes to participants.

Requirements for the Kintana Drive - Microsoft Project Interface

The Project Manager configures the interface behavior and performs synchronizations from the Kintana Workbench. The Kintana Drive - Microsoft Project interface is transparent from the Microsoft Project side, with the exception of task hyperlinks added to Kintana Web pages. To perform import, export and synchronization procedures, the following requirements must be met:

- Microsoft Project Requirements
- Access Grants
- Required Software

Microsoft Project Requirements

The Microsoft Project requirements for the interface are:

- Microsoft Project must be installed on the desktop PC.
- The saved project file must either be on the local PC, or on a mapped network drive.

Access Grants

The Project Manager needs a Kintana Power license and the appropriate access grants. The Drive-Microsoft Project interface relies on two Kintana Drive access grants: Edit Projects and Project Manager. See the 'Security Groups' chapter of the Kintana System Administration Guide for general information on Kintana Access Grants.

The Edit Projects Access Grant allows a user to edit planning data for a Drive project, but only if that user is identified as one of the Project Managers. (Each Drive project has a distinct list of one or more Project Managers.)

The Project Manager Access Grant is a skeleton-key grant that allows the user to edit planning data for all Drive projects. Both grants allow the user to create new projects.

In order to use the Drive-Microsoft Project interface, a user needs to have either:

• The Edit Projects Access Grant and be a Project Manager for the specific project.

Or

• The Project Manager Access Grant.



The Security model for the Drive-Microsoft Project interface is as follows:

- If the user is allowed to edit the planning data for the Drive master project, then that user may export or synchronize the project. Any user who can create a Drive project in the Kintana application may also create a Drive project by importing an Microsoft Project project.
- The Project Manager Access Grant is an easy way to give global permissions to the Program Management Office (PMO) staff.

Required Software

In order for the Kintana Workbench to communicate with the Microsoft Project installation on the Project Manager's desktop computer, an additional file must be installed. A Windows Dynamic Link Library (.DLL) file must be installed on the Project Manager's desktop computer. This .DLL file needs to reside somewhere in the PATH of the Windows operating system.

- If your browser is Internet Explorer, the process of installing the .DLL file is automatic.
- If your browser is Netscape, you will be prompted to manually download and install the .DLL file. The first time you try to use the Microsoft Project Integration feature, a dialog box opens that contains a link to the file. Click the link and follow the download/install procedure. You can download the file from the Kintana Web server to an appropriate location such as C:\WINDOWS, C:\WINNT, or the SYSTEM or SYSTEM32 directories. Then restart your Netscape browser.

Exporting to Microsoft Project from Drive

The following procedure describes how to export a Kintana Drive project to Microsoft Project. This creates a new project in Microsoft Project using the exported project's information.



Before exporting or synchronization, the Project Manager can select a synchronization mode from the **MSP Synchronization** tab in the Settings window or accept the default, **Drive controlled**. See "*Setting Up Microsoft Project Integration*" on page 80 for more information about selecting a synchronization mode in the Settings window.

1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.
| 🙋 Proj | ect Workbench |
|-------------|--|
| sults Query | Query: None Project Manager: johnsmith Project Name: Department: |
| Re | Project Template: EB Description: Include Finished Projects: C Yes C No Project State: B Program: EB Show only master projects? C Yes C No |
| | Scheduled Dates Start Date From: Dia To: Dia Frish Date From: Dia Frish Date Frish Date From: Dia Frish Date From: Dia Frish Date Frish Date Frish Date From: Dia Frish Date From: Dia Frish Date F |
| | New Project Import from MSP Max Rows 200 Save Query Clear List
Ready |

2. Query for and open the project to be exported.

When the PROJECT window opens, a menu option FILE -> EXPORT TO MICROSOFT PROJECT is available <u>if</u> the project was not originally imported from Microsoft Project or if it has never been exported to Microsoft Project. If the project does not meet these criteria, then the option displays as SYNCH WITH MSP.

3. Select the menu option FILE -> EXPORT TO MICROSOFT PROJECT. The EXPORT TO MICROSOFT PROJECT Wizard opens.

xport to Microsoft® Project	X
Progress Indicator Select Options Select Destination File Confirm Options Perform Export Export Verify Process Finish	The export will create a new Microsoft Project file. Please select a file name and location for this file: X:\Development_Plan.mpp
	< Back Next > Export Now Cancel

The various steps of the Export process are shown in the PROGRESS INDICATOR column on the left side of the Wizard. The current step of the Export process always displays in bold. Each step has its own interface that displays within the EXPORT TO MICROSOFT PROJECT wizard. After each step is completed, a check mark appears by the name of the step. At this point, you should be at the SELECT DESTINATION FILE step of the process.

You can click **NEXT** after completing each step of the Wizard or click **EXPORT NOW**.

- Click **NEXT** to go to the next interface for selecting options for the Export.
- Click **EXPORT Now** at any step to bypass the remaining steps and begin exporting the Drive project file. The Wizard uses the system default settings the first time you export a project. For each subsequent Export, the Wizard uses the settings from the last time you exported a Drive project.
- 4. Select a drive/directory as a destination for the new Microsoft Project file. Either enter a new file name or select an existing file name for the Microsoft Project file to be created during the export.

The path and name of the new Microsoft Project file appears in the File Chooser field.

The export will create a new Microsoft Project file, this file;	Please select a file name and location for
D:\Project_Management\Microsoft_Project_Files	\Development_Plan_2.mpp

- 5. Click **NEXT**. The CONFIRM OPTIONS interface displays in the EXPORT TO MICROSOFT PROJECT Wizard. It displays the following information:
 - The path and name of the Microsoft Project file to be created during the Export.
 - The properties selected by the user on the **MSP Synchronization** tab of the PROJECT SETTINGS window.
- 6. If the options presented on this interface are not correct, click the **BACK** button, go to the appropriate step in the Export process and change the options. (Or close the Wizard to access the Microsoft Synchronization Project Settings. These are located on the **MSP Synchronization** tab of the PROJECT SETTINGS window.)

If the options presented on this interface are correct, click **EXPORT Now**.

The Microsoft Project file is created from the Drive project and displays as an icon on the Windows taskbar. The FINISH interface displays in the

EXPORT FROM MICROSOFT PROJECT Wizard. This interface informs you whether or not the export was successful and if there are warnings in the Synchronization Report.

7. To see the Synchronization Report, click **SHOW SYNCHRONIZATION REPORT**. The report displays in a separate browser window, as shown in the example below.



See *"Available Reports"* on page 299 for more information about the Synchronization Report.

8. (Optional) Go to the MESSAGES section of the report to see any warnings created during the Export process. The MESSAGES section is shown below.

Messages

Message Source	Message Type	Description
MSP API	Warning	KDRV-50155 "Manual" Calculation option has been set for this MSP Project.

9. Click FINISH to close the EXPORT FROM MICROSOFT PROJECT window.



To see the most recent Synchronization Report after the EXPORT FROM MICROSOFT PROJECT window has been closed, select View -> LATEST SYNCHRONIZATION REPORT from the PROJECT menu.

10. Verify the project data in both Kintana Drive and Microsoft Project and either save or abandon the projects. An example of a Microsoft Project file created by exporting a Kintana Drive project is shown below.



Importing from Microsoft Project

The following procedure describes how to import a Microsoft Project project into Kintana Drive. This creates a new project in Kintana Drive using the imported project's information.

Note

When you import a large Microsoft Project (or a large number of projects) into Kintana, tables in the Kintana database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Kintana Database. Instructions for this are included in the Kintana System Administration Guide. Contact your System Administrator for help with this procedure.

1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.

🙋 Proj	ect Workbench
Results Query	Guery: None Project Manager: johnsmith Project Name: Department: Project Template: Description:
	Show only master projects? Yes No Scheduled Dates Start Date From: To: To: Start Date From: To: To: Finish Date From: To: To: To: To: To: To: To: To: To: To
	New Project Import from MSP Max Rows 200 Save Query Clear List Ready

2. Click **IMPORT FROM MSP**. The IMPORT FROM MICROSOFT PROJECT Wizard opens.

Progress Indicator	Please select the Microsoft Project file you would like to import:	
Select Options Select Source File Enter Project Details Select Control Mode Verify Resources Confirm Options Perform Import Import	XX	<u> </u>
/erify Process Finish	< Back Next > Import Now	Cancel

The various steps of the Import process are shown in the PROGRESS INDICATOR column on the left side of the Wizard. The current step of the Import process always displays in bold. Each step has its own interface that displays within the IMPORT FROM MICROSOFT PROJECT Wizard. After each step is completed, a check mark appears by the name of the step. At this point, you should be at the SELECT SOURCE FILE step of the process.

You can click **Next** after completing each step of the Wizard or click **IMPORT Now**.

• Click **NEXT** to go to the next interface for selecting options for the Import.

- Click IMPORT Now at any step to bypass the remaining steps and begin importing the Microsoft Project file. The Wizard uses the default settings the first time you import a project. For each subsequent Import, the Wizard uses the settings from the last time you imported a Microsoft Project file.
- 3. Select the appropriate drive/directory and choose the Microsoft Project file to be imported.

The path and name of the Microsoft Project file to be imported appears in the File Chooser field.

Please select the Microsoft Project file you would like to import:	
D:\Project_Management\Microsoft_Project_Files\Software_Release.mpp	D

- 4. Click **NEXT**. The ENTER PROJECT DETAILS interface displays in the IMPORT FROM MICROSOFT PROJECT Wizard.
- 5. Enter a unique Project Name for the new Kintana project in the PROJECT NAME field.
- 6. Select a Project Manager (or Managers) for the new Kintana project from the PROJECT MANAGER auto-complete list.
- 7. Click **NEXT**. The SELECT CONTROL MODE interface displays in the IMPORT FROM MICROSOFT PROJECT Wizard.
- 8. Select the synchronization control mode for the new project by clicking the appropriate radio button. Clicking a control mode's radio button displays a description of the control mode in the DESCRIPTION information box. See *"Synchronization Modes"* on page 270 for more information about synchronization modes.
- 9. Click Next.

The VERIFY RESOURCES interface displays if there are Microsoft Project resources that could not be matched to Kintana users. The unmatched resources shown in the Wizard and their assignments will not be imported. To display the unmatched resources in a browser window, click **SHOW PRINTABLE VERSION**. An example of the Unsuccessful Resources Match Report is shown below.

Kintana Drive _o
Unsuccessful Resource Matches Report
Synchronization Settings
Run Date: Mon Apr 15 11:52:45 PDT 2002
Project Manager: Admin User
Microsoft Project File Location: D:\Project_Management\Microsoft_Project_Files\
Microsoft Project File Name: Software_Release.mpp
Synchronization control mode: Kintana Drive controls actuals
Resource Identification: Kintana username
Unsuccessful Resource Matches
Product Mgmt
Development
QA
Marketing

- 10. Click **NEXT**. The CONFIRM OPTIONS interface displays the following information:
 - The path and name of the Microsoft Project file to be imported.
 - The Project Name and Project Manager of the new Drive project.
 - The synchronization control mode selected by the user.
 - Whether or not unmatched resources were found.
- 11. If the options presented on this interface are not correct, click the **BACK** button, go to the appropriate step in the Import process and change the options.

If the options presented on this interface are correct, click **IMPORT NOW**.

The Microsoft Project file opens and is imported into Kintana. A new Drive project is created.

The newly created Drive project opens. An example of the Drive project created by importing the Microsoft Project file Software_Release.mpp is shown below. Notice that it has the unique name Software_Release_1.

Seq	Name	State	Sched Duration	Sched Start	Sched Finish	Predecesso
1	■ Software_Release_1	Plan	208.8	3/4/02	12/19/02	
2	🖻 - Release Cycle	Plan	208.6	3/4/02	12/19/02	
3	- Requirements	Plan	36.8	3/4/02	4/23/02	
4	Gather Information	New	9.8	3/4/02	3/15/02	
5	Document	New	19.8	3/18/02	4/12/02	4
6	Review	New	4.8	4/15/02	4/19/02	5
7	Sign-Off	New	1.8	4/22/02	4/23/02	6
8	🖨 - Functional Design	Plan	26.8	4/24/02	5/30/02	3
9	Document	New	19.6	4/24/02	5/21/02	
10	Review	New	4.6	5/22/02	5/28/02	9
11	Sign-Off	New	1.8	5/29/02	5/30/02	10
12	🖨 - Tech Design & Coding	Plan	21.8	5/31/02	7/1/02	
13	Document	New	14.8	5/31/02	6/20/02	8
14	Review	New	4.6	6/21/02	6/27/02	13
15	Sign-Off	New	1.8	6/28/02	7/1/02	14
16	Coding & Unit Testing	New	79.8	7/2/02	10/21/02	12
17	⊡ Testing Cycle	Plan	39.6	10/22/02	12/16/02	16
18	Integration Testing	New	9.8	10/22/02	11/4/02	
19	Alpha 1	New	9.8	11/5/02	11/18/02	18
20 1	-Alpha 2	New	9.8	11/19/02	12/2/02	19
ask		Add	Edit	Delete		Schedule Proj
•	主 🐳 📬 View> Scher	dule Warnings/Errors	 Refresh 			Change Sta
Settings	Supply with MCP				01 5.	

 12. To view the Synchronization Report, click SHOW SYNCHRONIZATION REPORT. The report displays in a separate browser window. See "Available Reports" on page 299 for more information about the Synchronization Report.

Kintana Drive.
Microsoft® Project Synchronization Report
Synchronization Settings
Run Date: Mon Apr 15 13:41:33 PDT 2002
Project Name: Software_Release_1
Last Update Date: null
Project Manager: Admin User
Microsoft Project File Location: D:\Project_Management\Microsoft_Project_Files\
Microsoft Project File Name: Software_Release.mpp
Synchronization control mode: Kintana Drive controlled
Resource Identification: Kintana username
Synchronization Summary
Result: Success
Links: <u>Messages Unsuccessful Resource Matches Successful Resource Matches Trace Log</u>

13. Click **FINISH** to close the IMPORT FROM MICROSOFT PROJECT window.



To see the most recent Synchronization Report after the IMPORT FROM MICROSOFT PROJECT window has been closed, select View -> LATEST SYNCHRONIZATION REPORT from the PROJECT menu.

14. Verify the project data in both Kintana Drive and Microsoft Project and save the projects.



During the import process, Drive adds a hyperlink from each Microsoft Project task to the related page in the Kintana interface (such as a Task Detail, Subproject Summary or Project Summary page). This hyperlink is placed in the standard fields for task hyperlinks, and may overwrite existing hyperlinks.

Existing hyperlinks can be moved to a Microsoft Project custom field of the type "Text."

Synchronizing Microsoft Project and Drive

The following procedure describes how to synchronize projects in Kintana Drive and Microsoft. Any information that is shared between them is updated during the synchronization.



Before exporting or synchronization, the Project Manager can select a synchronization mode from the **MSP Synchronization** tab in the SETTINGS window or accept the default, **DRIVE CONTROLLED**. See "Setting Up Microsoft Project Integration" on page 80 for more information about selecting a synchronization mode in the Settings window.

1. Click the **DRIVE** screen group and click the **PROJECTS** screen. The **PROJECT** WORKBENCH opens.

🙋 Proj	ect Workbench
Results Query	Guery: None Project Manager: Johnsmith Project Name: Department: Project Template: Image: Construction: Include Finished Projects: Yes O Yes No Project State: Image: Construction
	Show only master projects / 0 Yes No Scheduled Dates Actual Dates Start Date From: Image: Comparison of the project of

2. Query for and open the project to be exported.

When the PROJECT window opens, a menu option FILE -> EXPORT TO MICROSOFT PROJECT is available <u>if</u> the project was not originally imported from Microsoft Project or if it has never been exported to Microsoft Project. If the project does not meet these criteria, then the option displays as SYNCH WITH MSP.

3. Select SYNCH WITH MSP. The SYNCHRONIZE WITH MICROSOFT PROJECT Wizard opens.

Synchronize with Microsoft® Pro	iect	×
Progress Indicator Select Options Confirm Options Perform Synchronization Synchronize Verify Process Finish	Please confirm the options you have selected: Synchronize with Microsoft Project file: D:\Project_Management\Microsoft_Project_Files\Development_Plan_4.mpp The following properties are selected on the MSP Synchronization tab of the Project Settings dialog: Synchronization control mode: Kintana Drive controlled New Microsoft Project resources are created using: Kintana username	
	< Back Next> Synch Now Cance	

The various steps of the Synchronization process are shown in the PROGRESS INDICATOR column on the left side of the Wizard. The current step of the Synchronization process always displays in bold. Each step has its own interface that displays within the SYNCHRONIZE WITH MICROSOFT PROJECT Wizard. After each step is completed, a check mark appears by the name of the step.

- 4. The CONFIRM OPTIONS interface displays the following information:
 - The path and name of the Microsoft Project file that the current Drive project will be synchronized with. This will be either a file that was originally imported from Microsoft Project or a file that was exported to Microsoft Project from the current Kintana Drive project.
 - The properties selected by the user on the **MSP Synchronization** tab of the PROJECT SETTINGS window.
- 5. If the options presented on this interface are not correct, click the **CANCEL** button and change the properties in the SETTINGS window.

If the options presented on this interface are correct, click **SYNCH Now**.

The Drive project is synchronized with the Microsoft Project file.

6. To see the Synchronization Report, click **SHOW SYNCHRONIZATION REPORT**. The report displays in a separate browser window, as shown in the example below.

Kintana Driv	e₀					
Microsoft® Project Synchronization Report						
Synchronization Settings						
Run Date: Tue Apr 1	6 09:46:22 PDT 2002					
Project Name: Devel	lopment_Plan					
Last Update Date: 20	002-04-16 09:19:51.0					
Project Manager: Ad	lmin User					
Microsoft Project Fil	e Location: D:\Project_	Management'Microsoft_Project_Files\				
Microsoft Project Fil	e Name: Development_	Plan_4.mpp				
Synchronization cont	rol mode: Kintana Drive	e controlled				
Resource Identification	on: Kintana username					
Synchronization Su	mmary					
Realt Success						
Tister Manager The		and a life second between the second s				
Links: Messages Unsuccessitu Resource Matches Successitu Resource Matches Irace Log						
Messages						
Message Source	Message Type	Description				
MSP API	Warning	KDRV-50155 "Manual" Calculation option has been set for this MSP Project.				

See *"Available Reports"* on page 299 for more information about the Synchronization Report.

7. Click **FINISH** to close the SYNCHRONIZE WITH MICROSOFT PROJECT window.



To see the most recent Synchronization Report after the Synchronize with Microsoft Project window has been closed, select View -> Latest Synchronization Report from the Project menu.

8. Verify the project data in both Kintana Drive and Microsoft Project and either save the projects or close them without saving.

Synchronization of Resources

In Project planning, the concept of "resources" can have multiple definitions. A resource can be a team member, time on a mainframe computer, or construction materials. A resource in Kintana Drive is a Kintana user or group of users capable of performing Tasks. Resources are chosen from the Project Team specified by a Project Manager. Microsoft Project supports tracking and costing of both human and material resources. Kintana Drive supports only human resources.

A project can also contain resources that have not been assigned. In Microsoft Project, unassigned resources appear in some resource-centric project views but have little functional significance. In Drive, unassigned resources are Kintana users listed in the Project Team who have no task assignments. During synchronization, all assigned human resources are synchronized. Unassigned human resources and unassigned material resources are not synchronized.

Note

Resource synchronization is based on either of two factors:

• A match between the Microsoft Project resource name and Kintana username.

Or

• A match between the Microsoft Project resource name and the concatenation of Kintana user's first name and last name.

This match is not case-sensitive. In Microsoft Project, it is possible to have two resources with the same name that vary only by which letters are uppercase or lower case. The synchronization mapping logic first checks for a match with the same upper/lower case. If no match with exact case is found, the first case-insensitive match is used.

In Drive, the synchronization does not guarantee that all assigned resources are part of the Project Team. If the Project Team needs to be maintained, then this must be done manually.

After synchronization, there will be a Microsoft Project resource matching every Kintana resource. If a Drive resource is missing from the Microsoft Project file, a matching resource will be created. Each Drive project has a configuration setting (in the **MSP Synchronization** tab of the SETTINGS window) specifying whether Microsoft Project resources created during synchronization are labeled with the Kintana username or the Kintana first/last name. The default value is by Kintana username.

Because the two applications define resources differently, not every Microsoft Resource will be defined in Drive. After synchronization, there may be some Microsoft Project resources with no matching Kintana resource, because new Kintana resources (which are always users) are not automatically created. These unmatched Microsoft Project resources are listed in the Microsoft Project Synchronization Report. See *"Available Reports"* on page 299 for more information on reports.

When the Import Wizard detects unmatched resources, the Wizard displays a list of these resources (in the Verify Resources step of the process) and offers the option of opening a printable version of this list in a browser window. This is in addition to listing the unmatched resources in the Microsoft Project Synchronization Report. The Project Manager can cancel the import at this point, create the missing users (or have the Kintana Administrator create the users) and run the import again.

Impact of Microsoft Project Rules on Fields

Microsoft Project contains a number of internal rules that determine the way field values are calculated in planning and actuals fields. These rules affect the synchronization process between Microsoft Project and Drive because calculations that work in one application do not necessarily carry over to the other application.

For example, reporting actuals in Microsoft Project is complicated due to its task reconciliation rules. Entering values into several actuals fields triggers automatic revisions of other planning and actuals fields. If you enter more than two or three actuals values, later entries start revising earlier entries in the Project.

Another difference is the method of defaulting logic between Drive and Microsoft Project. An example is the calculation of actual start date. Microsoft Project assumes that the task starts on the scheduled start date, unless the Project Manager specifically enters other data. This is because actuals are usually entered after-the-fact by the Project Manager. Drive assumes that work starts when the participant changes the task state from **READY** to **IN PROGRESS**. Drive assumes that actuals are reported near real-time.

The most common Microsoft Project rules for planning and actuals fields are listed below.

Planning Fields

- Start + Duration = Finish
- Effort = Duration * (sum of resources * units)

Actuals Fields

- Start = Actual Start (if known)
- Finish = Actual Finish (if known)
- Duration = Actual Duration + Remaining Duration
- % Complete = Actual Duration / Duration
- Remaining Duration is zero when task is 100% Complete
- Effort = Actual Effort + Remaining Effort

Solutions for Project Managers

In order to give consistent behavior during synchronization, Kintana Project Managers must:

- Synchronize only those actuals fields (such as % Complete, Actual Start and Actual Finish) that are enabled. See *Enabling/Disabling Fields* for more information about enabling fields.
- Synchronize these fields according to their defined priority order. See *Priority Order* for more information about the field priority order.

The Drive-Microsoft Project interface ignores Drive default values that are not enabled.

Enabling/Disabling Fields

To enable or disable actuals fields:

- 1. In the PROJECT WORKBENCH, search for and open the project to be exported, imported or synchronized.
- 2. Select **PROJECT -> SETTINGS** from the menu at the top of the Kintana Workbench. The SETTINGS window opens.

MSP Synchronization		Cost Management	Res	Resource Management		Time Management Basel		
Project Fields		Exception Rules	Indicato	ors So	cheduling	Security	Project Team	
his tab configu ly Task portlet i roject Window	res the Project n the standard	fields that can be displayed Kintana interface. Changing	in the "Plan" [.] the field con	tab of the Projec figuration here	ct window, ar does not char	nd also the Project a nge the display in th	nd Task detail pages an e other tabs of the	
Planning Fields				TCActivity Field	s			
	Workbench				Workbench			
Enabled	Only	Fields		Enabled	Only	Fields		
	Г	Department				% Complete		
	Г	Description			Г	Actual Duration		
	Г	Last Update Date			Г	Actual Effort		
	Г	Priority			Г	Actual Finish Dat	e	
		Project/Teek #			Г	Actual Start Date	•	
_	-	Project/Task #			Г	Confidence		
		Resource Group			Г	Estimated Finish	Date	
	Г	Scheduled Effort			Г	Estimated Remain	ning Duration	
	Г	Task Category			Г	Estimated Remain	ning Effort	
	Г	Planned Labor				Actual Labor		
	Г	Planned Non-Labor			Г	Actual Non-Labo	r	
	Г	Planned Total			Г	Actual Total		
							1 .	

- 3. Click the **PROJECT FIELDS** tab.
- 4. In the ACTIVITY FIELDS pane:
 - Enable a field by selecting the appropriate check box in the ENABLED column.
 - Disable a field by deselecting the appropriate check box in the ENABLED column.
- 5. Click **OK**.

Priority Order

The following list of actual fields is ordered from the highest priority to the lowest priority for the purpose of synchronization.

- % Complete
- Actual Start
- Actual Finish
- Actual Duration

- Actual Effort
- Estimated Finish Date
- Remaining Duration
- Remaining Effort

The priority order is the same for all projects. '% Complete' is ranked highest because it is used prominently in the Dashboards and reports of both applications. Thereafter, fields that display actual measures take precedence over estimates, and dates take precedence over durations. Fields with the highest priorities should be enabled in a project more often than those fields with lower priorities.

Setting Up Projects

When setting up Drive projects for synchronization, Project Managers should:

- Enable as few fields as necessary that will accurately give visibility to the results of a synchronization, export or import.
- Not enable potentially conflicting sets of fields. (See below for potential conflicts.)

Avoiding Potential Conflicts When Setting Up Your Drive Project

The following guidelines describe strategies for avoiding potential conflicts.

- Enable only two of the three calendar actuals (Start, Finish and Duration) for a Kintana Drive project.
- Enable only two of the three calendar estimates (% Complete, Estimated Finish and Remaining Duration) for a Kintana Drive project.
- If Actual Duration is enabled, then enable either % Complete or Remaining Duration.
- Do not enable all three duration actuals (% Complete, Duration and Remaining Duration) for a Kintana Drive project.

See *"Troubleshooting"* on page 303 for more information about unsupported fields and features in the Kintana Drive - Microsoft Project interface.

Conditional Editing Allowed In Drive

Depending on the synchronization mode that has been selected for a project, the project structure and task information will be controlled by either Kintana or Microsoft Project. Depending on the synchronization control mode selected for the project, some editing features in Drive will be disabled. Information controlled by Microsoft Project cannot be edited in Drive. The following sections describe allowed/restricted types of conditional editing in Drive for each of the three synchronization modes.

- Editing Kintana Drive Controlled Projects
- Editing Microsoft Project Controlled Projects
- Kintana Drive Controls Actuals

Summaries of the conditional editing restrictions for each synchronization mode are listed in *"Conditional Editing Summary Table"* on page 295.

Editing Kintana Drive Controlled Projects

When Drive controls the project, the user is allowed to edit all information in Drive. This includes changing the task structure, adding or deleting new subprojects and tasks, and editing task scheduling and actual fields.

Editing Microsoft Project Controlled Projects

When Microsoft Project controls all the project planning and tracking activities, the comparable editing functions in Drive are disabled. The data that is distinct to Kintana and not shared with Microsoft Project can still be edited. This includes user data, custom project fields and task references.

Workbench Interface

In the Workbench, subprojects and tasks can be edited in the Project Plan panel in the Project Detail window, the Subproject Detail window, and the Task Detail window (when it is opened in the Project window or the Task Workbench). All the shared fields are disabled in these windows.

Any function that could change the project and task structure is disabled. This includes the following components:

- Add Task button
- Delete button
- Indent/Outdent buttons

• Move up/Move down buttons

Since scheduling can change dates and durations, the Schedule Project button is disabled. The state of the Drive Project cannot be changed in this synchronization mode; therefore the Change State is also disabled. The key shortcuts for these buttons are disabled as well.

Kintana Interface

In the Kintana interface, the My Task portlet and the Task Detail page will not allow users to enter task actuals. The My Tasks portlets and the Task Search page still return the current incomplete tasks assigned to a user regardless of the control mode. This provides visibility to the project's participants. The actuals collected in Microsoft Project are visible through the My Task portlet.

Roll-up calculations are disabled through Drive, whether triggered by actions in the Workbench, the Kintana interface or any other method.

Kintana Drive Controls Actuals

The 'Kintana Drive controls actuals' mode is more complex than the other two modes when disabling fields. This mode allows users to change the actual fields while keeping the planning fields unchanged.

In the Project Plan panel, Project Detail window, and Task Detail window, only actual fields are editable. The planning fields are disabled. In the Project Detail Window, planning fields in the Subproject/Task table are also not editable.

Similar to the Microsoft Project control mode, any function that could change the project and task structure is disabled. This includes the following components:

- Add Task button
- Delete button
- Indent/Outdent buttons
- Move up/Move down buttons

Some roll-up operations are disabled. Roll-up of actuals fields still occurs, but schedule fields will not roll-up. The imported values from Microsoft Project are retained.

The functionality allowed in the Shared control mode is very similar to the functionality allowed to a user who has been given only the Update Tasks Access Grant.

Conditional Editing Summary Table

Table 12-1 summarizes the allowed or restricted conditional editing in Drive for each of the three synchronization modes.

Fields in Drive	Drive controlled	MSP controlled	Kintana Drive controls actuals					
Project Plan								
Structure fields	Yes	No	No					
Planning fields	Yes	No	No					
Actual fields	Yes	No	Yes					
Subproject Detail Window								
Structure fields	Yes	No	No					
Planning fields	Yes	No	No					
Actual fields	Yes	No	Yes					
Other non-shared fields	Yes	Yes	Yes					
Task Detail Window								
Structure fields	Yes	No	No					
Planning fields	Yes	No	No					
Actual fields	Yes	No	Yes					
Other non-shared fields	Yes	Yes	Yes					
Project Window								
Add/Delete Task button	Yes	No	No					
Indent/Outdent Task button	Yes	No	No					
Move up/Move down Task button	Yes	No	No					
Schedule Project button	Yes	No	No					
Change State button	Yes	No	No					
Roll-up								
Schedule fields	Yes	No	No					

Table 12-1. Conditional Editing Allowed in Drive

Fields in Drive	Drive controlled	MSP controlled	Kintana Drive controls actuals	
Actuals fields	Yes	No	Yes	
My Tasks Portlet				
Actuals fields	Yes	No	Yes	
Task Detail Page				
Actuals fields	Yes	No	Yes	

Table 12-1. Conditional Editing Allowed in Drive

Summary of Synchronization Behavior

The following sections describe the behavior of a Drive project after a successful export to Microsoft Project.

The task structure and task names for the project in Drive and the project in Microsoft Project will be identical. There will be a 1-to-1 relationship between tasks, and tasks will appear in the same sequence in both projects. The exception to this rule is that the Microsoft Project project may not have a Master Project row. The synchronization will not create a Master Project row.

The resources assigned to each task will be identical. The predecessors and constraints will be identical, for the types of predecessors and constraints supported by Drive.

If Drive is collecting actual start and finish dates, then these dates will be exported to Microsoft Project. Actual dates take precedence over Drive scheduled dates. Time information will also be synchronized.

If Drive is collecting "estimated actuals" then this information will be exported to Microsoft Project. Estimated actuals fields deal with estimated time to completion and estimated time of completion. Examples are the % Complete, Estimated Finish Date and Remaining Effort fields. These estimates may cause Microsoft Project to revise the Task duration or schedule dates.

Scheduled start and finish dates for tasks without actuals will be identical in Drive and Microsoft Project. Roll-up dates are automatically calculated in Microsoft Project, and may not be identical to those in Drive. Time information will also be synchronized.

If Drive is tracking task effort, then this will be exported to Microsoft Project. Microsoft Project will infer resource assignment units based on the task duration, effort and number of resources. Roll-up effort is calculated by Microsoft Project, but will be identical.

Duration is calculated by Microsoft Project based both on the start and finish dates and the resource calendars in Microsoft Project. Task durations and rollup durations will sometimes differ slightly between the two applications.

Integration with Other Kintana Products

Tasks in Drive projects can include additional references to other Kintana entities (such as Requests and Packages) or points of information, allowing easy access and visibility to data related to the current Task. Summary information for references is viewed as part of the Task. (See "*Attaching References to Tasks*" on page 133 for more information about attaching references to Tasks.) The following sections describe using reference types in Drive projects.

- Limitations on References
- Allowed Types of References During a Synchronization
- References Summary Table

Limitations on References

The Kintana Drive - Microsoft Project interface supports most of the taskrelated reference types. Any limitations to supporting those references are described below.

- Creating New Tasks while Adding a Reference
- Task Updated by Request/Request Updates Task
- Task-Successor References

Creating New Tasks while Adding a Reference

Normally, when a user adds a reference to a Drive project, that user may either attach the reference to an existing task, or the user may create a new task. (The user must also have the right security permissions to do so.) However, in the two synchronization modes where Microsoft Project controls the task structure, this is not allowed. References to existing tasks can still be created.

Task Updated by Request/Request Updates Task

A reference can be configured so that the % Complete of the Request updates the % Complete of the referenced task. In the synchronization mode where Microsoft Project controls the entire project, a reference of this type cannot be created.

Task-Successor References

References can also be created where a Request is the predecessor of a task. This can be either a finish-to-start predecessor or a finish-to-finish predecessor. In the first case, the task could not start (or could not progress if already started) until the request predecessor is completed. In the second case, this means that the task could be 100% complete but cannot reach the "Completed" state until the request predecessor is completed. Both types of references are allowed, but are not visible in the synchronized Microsoft Project project.

Allowed Types of References During a Synchronization

The reference types that are allowed during a synchronization are described below, along with their limitations:

- Microsoft Project control mode
- Shared control mode

Microsoft Project control mode

All types of references are allowed in this mode except for 'Task Updated by Request/Request Updates Task.'

If a task that has a reference is marked as 100% complete but the request predecessor is not complete, the potential problem will be flagged as a warning in the Microsoft Project Synchronization Report.

Dependent references will not stop Drive actuals from being updated by synchronization.

References cannot be created during synchronization.

Shared control mode

All types of references are allowed in this mode.

When a task is 100% complete in Drive but is pending a finish-finish predecessor, it will be synchronized out to Microsoft Project as only 99% complete. This ensures that any milestone successors of the task will not

incorrectly be shown as complete. This correction will be noted as an informational message in the Microsoft Project Synchronization Report.

References cannot be created during synchronization.

References Summary Table

Table 12-2 lists the allowed references during synchronization for each control mode.

Type of Reference	Drive controlled	Kintana Drive controls actuals	MSP controlled	
Informational	Yes	Yes	Yes	
Task is the predecessor of a Request or Package	Yes	Yes	Yes	
Task is the finish-to-start successor of a Request or Package	Yes	Yes	Yes, but not enforced in Microsoft Project. Detected	
Task is the finish-to-finish successor of a Request or Package	Yes	Yes, but is sometimes synchronized as 99% complete	during synchronization.	
Task Updated by Request/Request Updates Task	Yes	Yes	No	

Table 12-2. Allowed References During Synchronization

Available Reports

Kintana features three reports that contain information about the Drive -Microsoft Project interface:

- Microsoft Project Synchronization Report
- Unsuccessful Resource Matches Report
- Project Detail Report

Only the Project Detail Report is available from the Drive Report Submission Workbench interface. The other two reports are created automatically during an import, export or synchronization.

Microsoft Project Synchronization Report

The Microsoft Project Synchronization Report is created during an import, export or synchronization. The report displays in a separate browser window when requested by the user.

Vinter Duin	_						
Microsoft® Project Synchronization Report							
Synchronization Set	Synchronization Settings						
Run Date: Tue Apr 16	6 09:46:22 PDT 2002						
Project Name: Devel	opment_Plan						
Last Update Date: 20	02-04-16 09:19:51.0						
Project Manager: Ad	min User						
Microsoft Project File	e Location: D:\Project_1	Management\Microsoft_Project_Files\					
Microsoft Project File	e Name: Development_l	Plan_4.mpp					
Synchronization contr	ol mode: Kintana Drive	controlled					
Resource Identificatio	n: Kintana username						
Synchronization Sun	nmary						
Result: Success	Result. Success						
Links: <u>Messages Unsuccessful Resource Matches Successful Resource Matches Trace Log</u>							
Messages							
Message Source	Message Type	Description					
MSP API	Warning	KDRV-50155 "Manual" Calculation option has been set for this MSP Project.					

Figure 12-1 Microsoft Project Synchronization Report

Table 12-3. Microsoft Project Synchronization Report Paramet
--

Sections/Fields	Description				
Synchronization Settings					
Run Date	The date and time the report was run.				
Project Name	The name of the Project.				
Last Update Date	The date and time the Project was last updated.				
Project Manager	The name of the Project Manager who performed the synchronization.				
Microsoft Project File Location	The drive and path of the Microsoft Project file.				
Microsoft Project File Name	The name of the Microsoft Project file.				

Sections/Fields	Description
Synchronization control mode	The synchronization behavior selected by the Project Manager.
Resource Identification	The type of name (either full name or username) given to new Resources created during synchronization.
Synchronization Summary	
Result	Whether the synchronization was successful or unsuccessful.
Messages	Information, warning or error about the export, import or synchronization process. Messages include a Message Source, Message Type and Description.
Unsuccessful Resource Matches	Resources that were unsuccessfully matched during export, import or synchronization.
Successful Resource Matches	Resources that were successfully matched during export, import or synchronization.
Trace Log	A log of successful/unsuccessful processes that occurred during the export, import or synchronization.

Table 12-3. Microsoft Project Synchronization Report Parameters

Unsuccessful Resource Matches Report

The Unsuccessful Resource Matches Report is created during an import, export or synchronization. It lists any resources that were not successfully matched between the Kintana Drive and Microsoft Project projects. The report displays in a separate browser window when requested by the user.

Kintana Drive₀
Unsuccessful Resource Matches Report
Synchronization Settings
Run Date: Mon Apr 15 11:52:45 PDT 2002
Project Manager: Admin User
Microsoft Project File Location: D:\Project_Management\Microsoft_Project_Files\
Microsoft Project File Name: Software_Release.mpp
Synchronization control mode: Kintana Drive controls actuals
Resource Identification: Kintana username
Unsuccessful Resource Matches
Product Mgmt
Development
QA
Marketing

Figure 12-2 Unsuccessful Resource Matches Report

Sections/Fields	Description
Synchronization Settings	
Run Date	The date and time the report was run.
Project Manager	The name of the Project Manager who performed the synchronization.
Microsoft Project File Location	The drive and path of the Microsoft Project file.
Microsoft Project File Name	The name of the Microsoft Project file.
Synchronization control mode	The synchronization behavior selected by the Project Manager.
Resource Identification	The type of name (either full name or username) given to new Resources created during synchronization.
Unsuccessful Resource Matches	Resources that were unsuccessfully matched during export, import or synchronization.

Table 12-4. Unsuccessful Resource Matches Report Parameters

Project Detail Report

This report lets you query projects by their header fields. You can specify whether to include the following aspects of the Project:

- Custom fields
- Status

- Notes
- Activities
- Packages
- Requests
- References
- Transaction History

The Show Project Settings radio button must be set to 'Yes' to display synchronization-related information.

The Project Detail Report parameters are shown in *Figure 12-3*. See "*Project Detail Report*" on page 314 for descriptions of the report's parameters.

When the state of the second s						_ & ×
Parameters Scheduling	Notifications					
Status:		🛄 Report Number:		Requested By: adm	nin	
Report Type: Project Detail	Report					III
Project Name:		III	Project Manager:			
Project State:		III	Summary Condition:			II
Project Template:			Department:			•
Project#:						
Sched Start Date From:			Sched Start Date To:			iii
Sched Finish Date From:		1	Sched Finish Date To:			12
Show Action Items:	 Yes 	C No	Show References:	 Yes 	O No	
Show User Data:	 Yes 	C No	Show Custom Fields:	Yes	C No	
Show Notes:	 Yes 	C No	Show Project History:	C Yes	No	
Show Project Settings:	C Yes	No				
Show Only Master Projects:	€ Yes	C No				
View Report View L	og				OK Submit	Cancel

Figure 12-3 Project Detail Report - Parameter Fields

Troubleshooting

Microsoft Project supports many features that are not duplicated in Drive. Some of these unsupported features relate to information that Drive does not track or support, such as cost calculation, baseline tracking and earned-value calculations. When a Microsoft Project project is imported into Drive, this information is not represented. Information of these types is not affected by the interface. Importing the Microsoft Project project into Drive does not remove this data from Microsoft Project. Exporting from Drive does not create or default this data.

Other Microsoft Project features deal with the scheduling and tracking information that is synchronized between the two applications. In these cases, the interface converts the Microsoft Project data into information that Kintana can represent. The interface attempts to maintain the intent of the original Project Plan as closely as possible.

The following sections describe problems that users may encounter while using the Drive - Microsoft Project interface.

- Resource Calendars
- Units
- Advanced Predecessors
- Advanced Constraints
- Calculation of Roll-up Values
- Microsoft Project's Manual Scheduling Mode
- Scheduling Your Project in Microsoft Project

For more information about all unsupported Microsoft Project features, see the Kintana White Paper listed on the Support section of the Kintana Web site (www.kintana.com).

Resource Calendars

Resource calendars are not synchronized between the two applications. Since both duration and effort are a function of both start/finish dates and Resource calendars, the duration and effort values in Drive and Microsoft Project may not match.

Units

Units are also referred to as resource load percentages. In Microsoft Project, each resource can be assigned to a task with a different load percentage (from zero percent to one hundred percent.) For example, the same resource could be assigned to two different tasks and have a resource load percentage of fifty percent for each one.

Since Kintana does not track assignment units, the load percentage of any resource imported into Drive will not be recognized.

Advanced Predecessors

Microsoft Project has several advanced predecessor types not available in Drive: start-to-start (SS), start-to-finish (SF) and finish-to-finish (FF).

Kintana cannot represent these advanced predecessors, but it will represent the scheduled start and finish dates resulting from them. During synchronization, these types of predecessors will be omitted from the Drive Project Plan. This may cause successor tasks in Drive to incorrectly appear in a "Ready" state.

To convert a project from Microsoft Project to Drive, a Project Manager needs to replace unsupported predecessor types with a supported alternative - a constraint, for instance.

Advanced Constraints

Microsoft Project supports several advanced constraint types not available in Kintana: as late as possible (ALAP), must finish on (MFO), finish no earlier than (FNE), and task deadlines.

Kintana cannot represent these advanced constraints, but it will represent the scheduled start and finish dates resulting from them. During synchronization, these types of constraints are omitted from the Drive Project Plan.

Calculation of Roll-up Values

Microsoft Project allows you to choose between 'automatic' and 'manual' scheduling modes. The default mode is 'automatic,' and many users may not be aware another mode is available. When Microsoft Project is in manual scheduling mode, the F9 button must be pressed to recalculate Task grouping roll-up values and reschedule tasks.

Microsoft Project's Manual Scheduling Mode

If your Microsoft Project file is in manual scheduling mode and you did not select this option, it could be because:

- You created this project by exporting a Drive project from Kintana. The Export Wizard turns off automatic scheduling mode in order to have the task dates in Microsoft Project match those in Drive.
- You opened a project that was in manual mode and then created the new Microsoft Project file. This caused the new project to inherit the manual mode setting as a default.

Scheduling Your Project in Microsoft Project

The synchronization process can sometimes stop in mid-operation because Microsoft Project displays a warning dialog. Microsoft Project is not completely consistent about when it will respond to a COM call with a warning dialog, so this cannot always be avoided.

When the synchronization process stops and the warning dialog appears, the Microsoft Project button in the Windows task bar flashes as a signal that the application needs attention. To continue the synchronization process, go to the Microsoft Project file and dismiss the warning dialog.

The best way to prevent the warning dialog from appearing during synchronization is to resolve all planning problems in Microsoft Project (such as violated constraints) prior to synchronization. You may need to manually recalculate the project's schedule by pressing the F9 key before you attempt synchronization.

Appendix 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 onetime 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 308
- "Creating Tasks from Requests" on page 308
- "Dependencies Between Tasks and Requests" on page 310
- "Visibility into Tasks and Requests" on page 315

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.

🅾 Project	Informatio	n: Kintana Rel	ease 5.5				×		
Proje	ct Name: 👖	<intana releas<="" th=""><th>e 5.5</th><th></th><th></th><th></th><th></th></intana>	e 5.5						
Project N	Project Manager: jsmith Project State: New								
Details	Cost Pre	decessors 🛛 🖻	Action Item	is 🗐 🗄 Notes 🛙 Ba	selines 📃 Refere	nces User Data			
Туре	Name	Details	Status	% Complete	Description	Relationship	R		
Request	30006	DEM - Initiat	New	0%	Need new financ.	. Related to this Pr.	. Informa		
Items in	Bold are a	actively controll	ing this Proje	ect					
New Ref	erence Re	equest (Existing	g) 🔽 🖂 Adi	d Remove	Fill	ter Open Refa	erence		
					C	K Apply	Cancel		
Ready									

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.



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.



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.

🥵 Kintana Workbench: John Smith (ismith) on Kintana 5.0 : Drive - Projects 🗾 🗔 🗙									
<u>File Edit Too</u>	ils Na	vigate	<u>W</u> indow <u>P</u> roject <u>H</u> elp						
Create	🩋 Proj	iect : E	Blackberry Rollout						_ 8 ×
Drive	Plan Cost EV Analysis Baselines Gantt C							nart: 유 오	Contract Con
Deliver	Sea		Name	State	Sched	Sched Start	2003		
Dashboard	369	•			Duration		May June		July
Environments	1		Blackberry Rollout	Active	31.0	5/26/03			
Configuration	2		I. Requirements Analysis Solution Decime	Ready Dending Predec	3.0	5/26/03	admin		
On Adais	4		II. Solution Design	Pending Predec	5.0	6/3/03	-agaetz	anewby ivicks	
Sys Admin	5		V. User Acceptance	Pending Predec	5.0	6/10/03		mfisch	
	6		Commit to Project	Pending Predec	0.0	6/17/03		►♦ 6/17/03	
	7		V. Detailed Design	Pending Predec	3.0	6/17/03		iprenner	
Projects	8		VI. Build	Pending Predec	6.0	6/20/03		•	agaetz;gnewby;b
· ·	9		VII. Test	Pending Predec	3.0	6/30/03			▶ nfisch
	10			Pending Predec	1.0	7/3/03			⊳⊒ j miles
	11		IX. Train Users	Pending Predec	2.0	7/4/03			→ ga
Reports	12		-•Go Live	Pending Predec	0.0	7/8/03			•••
DSS Reports		•		I		Þ	<		
	111	-	→ Edit Done ♣All					Refresh	Schedule Project
	Task C	reate	d From Request 💽 Add					OK Sa	ave Cancel
	Task Projec	t Crea	ted From Template						
KINTALA	Task C	reate	d From Request World ench	n 🥹 Blackberry Ro	ollout				

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*.

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.

Table A-1. Dependency Relationships: Requests to Tasks

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 311 and "Making Requests Dependent on Tasks" on page 314.

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.

Task Category: Task State: Pending Predecessor							
Details Resource	ces Cost I	Exceptions Prede	ecessors				
🗄 Action Items 🛛 🖻 Notes	es 🖻 Notifications 🛛 🖻	Baselines 🖻 References	User Data				
rpe Name Details	Status % Complete	Description Relation	nship R				
ns in Bold are actively contro v Reference Request (Existin	olling this Task ing) 🔻 Add Remove	ок Арр	en Reference y Cancel				

Ε	References						
	🗧 Projects/Ta	isks					
	Name	Project Manager/Resource	Master project	State	% Complete	Relationship	Relationship Details
1	K (Request No.: 3	300	<u>Kintana</u>	Updated By Request	0%	FF Predece 🔹	Auto-Updating: Task 30587 is

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 312
- *"Task Can't Complete Until Request Closes (FF Predecessor)"* on page 312
- "Task Auto-Updated by Request" on page 313

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.



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.


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 approvied 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 Tasks 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.



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
×	(Request No.: 300		<u>Kintana</u> Release 5.5	Updated By Request	0%	FF Predece	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 314

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.



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: C Requests
```

```
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					<u>? Edit + ×</u>
Reference	Detail	Status	% Assigned Complete User	Description	Referenced By
Request 87266	Product Bug	New	0%	Previou	Impleme
Request 87233	Product Bug	New	0%	Install	<u>Desiqn/</u>
				Showing	l to 2 of 2: <u>Maximize</u>

Figure A-4 Project References Portlet

Appendix

Appendix B Users and Licensing

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

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

Power and Standard Licenses

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

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

Power Licenses implicitly provide a user with access to all product features available to a Standard License user, as well as the use of the Kintana Workbench. For example, a user with a Drive Power License does not require an additional Standard License to perform the tasks associated with Standard Licenses; for example, updating Tasks in the HTML interface.



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

Kintana Drive Licenses and User Roles

A Drive Power License provides advanced product features for:

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

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

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

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

Business Role	Tasks Associated with Role	Product Capabilities	
Project Managers	Creating, planning, and	Access to Workbench and HTML interface	
Project Leads	monitoring projects.		
Program Managers	Updating tasks.	Configuring report types and validations.	
0 0	Assigning resources	Setting up users and security.	
	Setting start and end dates.	Configuring Project Templates.	
	Setting task dependencies.	Creating/Updating Projects adding/removing	
	Running project reports.	Tasks, dependencies, Subprojects.	
	Configuring Project Templates.	Deleting/Canceling Projects.	
Kintana	Setting up users.	Modifying all standard and custom	
Administrators	Assigning security groups.	assignments, Effort, Confidence, etc.	
	Configuring report types.	Adding/removing References including Packages, Requests, other Projects, attachments.	
		Advanced querying.	
		Running, scheduling, and configuring reports.	
		All capabilities listed for Standard license.	
		Create a Budget	
		Create a Staffing Profiles/Resource Pools	

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

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

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

Kintana Create Licenses and User Roles

A Create Power License provides advanced product features for:

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

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

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



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

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

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

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

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

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

Kintana Deliver Licenses and User Roles

A Deliver Power License provides advanced product features for:

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

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

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

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

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

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

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

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

Kintana Dashboard Licenses and User Roles

A Kintana Dashboard Power License provides advanced product features for:

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

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

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

Note

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

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

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

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

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

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

Kintana Solution Licenses

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

- Demand Management
- *PMO*
- Time Management

Demand Management

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

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

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

PMO

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

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

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

Time Management

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

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

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

Kintana Accelerator Licenses

Kintana Accelerators ar provided on a site-license basis (i.e. they do not have to be associated with individual users). Accelerator licenses enable additional screens and fields in Kintana. See the documentation for the Accelerators installed at your site for details.

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