SERENA

SERENA®
Dashboard 2.1

Getting Started Guide

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Chapter 1

Serena Dashboard Overview

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About Serena Dashboard

Serena Dashboard is a powerful reporting application that allows users at all levels of the organization to review project metrics that are most immediately relevant to them. Serena Dashboard runs on the Information Builders WebFOCUS platform, a rich business reporting tool that can aggregate key performance data from a variety of critical systems. Serena Dashboard presents data on your most essential key performance indicators (KPIs) with a fully configurable set of graphical charts, tabular data, and more.

What Is Included Out-of-the-Box

Right out-of-the-box, Serena Dashboard includes a number of KPI metrics designed to present critical data stored in the Serena Orchestrated ALM solutions, such as Serena Release Manager, Serena Development Manager, and Serena Requirements Manager. Once Serena Dashboard is installed and configured, you can immediately start track such KPIs as the following:

- Deployment tasks and status
- Release rates
- Break / fix rates across the deployment workflow
- Build success rates and details
- Defect submission and escape rates
- Project status
- Project duration
- Requirement approval status
- ChangeMan ZMF package status

And many more. See Using the Dashboard Out-of-the-Box for a detailed list of all out-of-the-box metrics.

Chapter 2

Using the Dashboard Out-of-the-Box

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Logging in to Serena Dashboard

Enter the URL to Serena Dashboard in a browser. The default format is as follows:

`http://server:port/dashboard/login`

For example, if the server is called *dashboard* and the port number is *8080*:

`http://dashboard:8080/dashboard/login`

Enter your username and password and click **Log In**. The user name and password are case-sensitive.

Setting User Preferences

From the My Settings screen, you can choose a default view to see when you log in, reset your password, and set the order in which views appear in My Favorites.

To set your preferences:

1. Click the **Settings** button.
2. Under **My Default Settings**, choose the view that you would like to see when you log in from the Default View List.
3. Under Change My Password, you can enter a new login password.
4. To change the order in which views are listed under My Favorites, select a view (or views) under **Reorder My Favorites** and click the Move Up or Move Down buttons as needed.
5. Click **OK**.

Customizing Your Dashboard Views

You can create views that display specific metrics. This allows you to customize your experience with Serena Dashboard so that when you log in, the first thing you see is whatever is most important for you. You can save multiple views with different metrics suited to different purposes, and lay out the metrics in the views however you like.

To set up your own custom view:

1. You can add a new view in either of the followiong ways:
   - First select an existing view from the **Views** view and click the **Copy the selected view to my Favorites** button . Then, to edit the copied view, display the **My Favorites** view, select the view that you just added to your favorites, click the Actions button and select Edit View.
   - From any view, click the **Actions** button and select **Add New View**.
2. From here, you can set the following:

- The title and description for your custom view.
- The values for any custom attributes that your administrator has defined for metrics.
- Under **Access Level**, whether this view is restricted to your view or visible to other users of your Serena Dashboard implementation.

3 Under Metrics, you can see a pane representing the view. You can add and arrange metrics in this pane to modify the layout of the view. click the **Add** button. to add a new metric. A box appears representing the placement of a metric on the page.

4 Click and drag on the title bar on any metric box in order to move the metric to a different location in the view.

5 Click on the bottom or side walls of a metric and drag to resize it.

6 Click the **Edit** icon on any of the metric boxes and select the metric you want to display in this box. Click **OK**.

7 Repeat these steps until you have chosen and arranged all of the metrics you want for this view.

8 Click **OK** to save changes.

Out of Box Metrics for Serena Release Manager

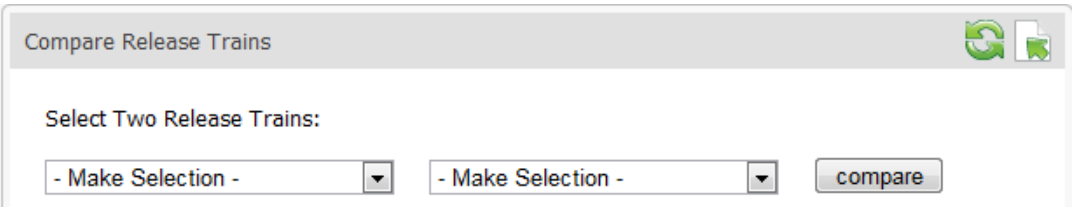
Serena Dashboard includes metrics on several Key Performance Indicators (KPIs) and metrics that are relevant to most release management organizations. These metrics are configured to work directly out-of-the-box with the default Release Manager configuration. Serena Dashboard pulls data from the following sources:

- The Release Manager process apps running on SBM.
- Dimensions CM.

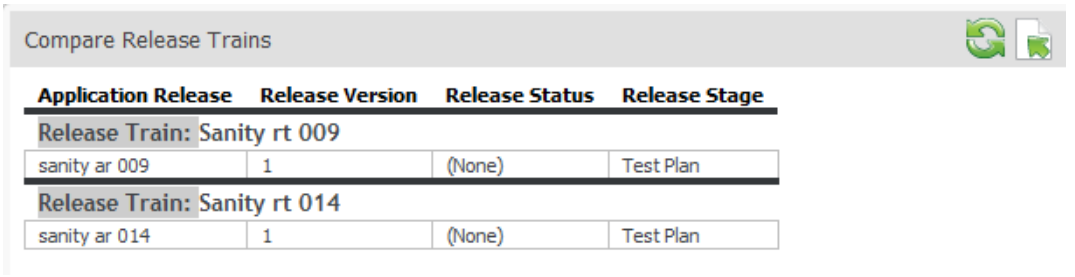
The following metrics are included.

Compare Release Trains

The Compare Release Trains metric allows you to choose which release trains to compare:



And then evaluate the current status and stage of each:



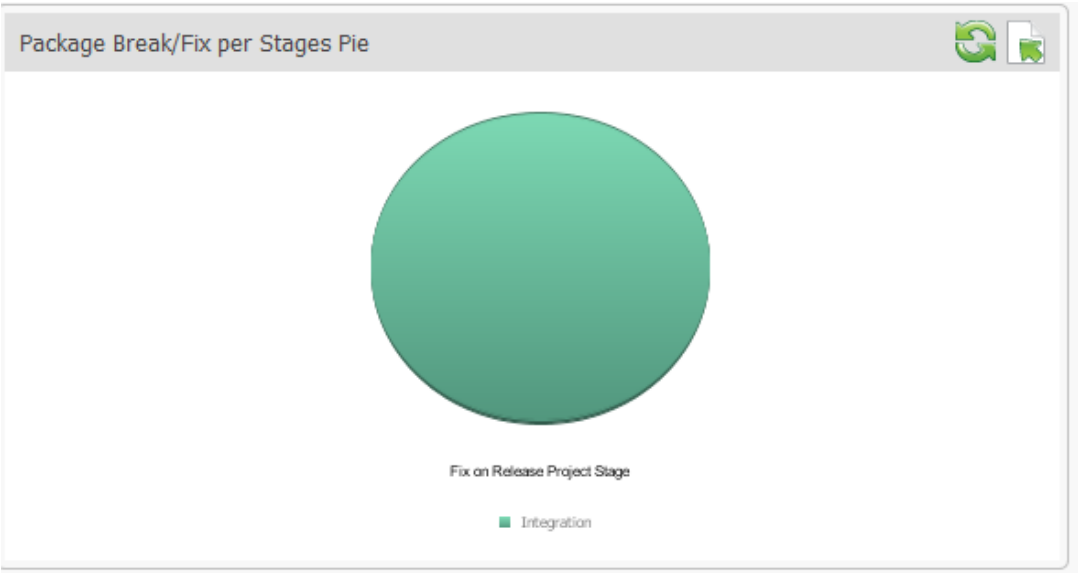
Application Release Rates

The Application Release Rates metric provides a bar chart that tells you the rate at which you are deploying requests and deployment units associated with an application.

Package Break / Fix Per Stages

The Package Brea / Fix Per Stages displays the number of break-fixes that have occured in specific workflow states, across all release packages You can display break-fixes in a bar chart or a pie chart. You can click a pie chart to dipslay details about where the break-fixes occurred.

In the example below, 100% of break-fixes across all release packages occurred during the Integration stage:

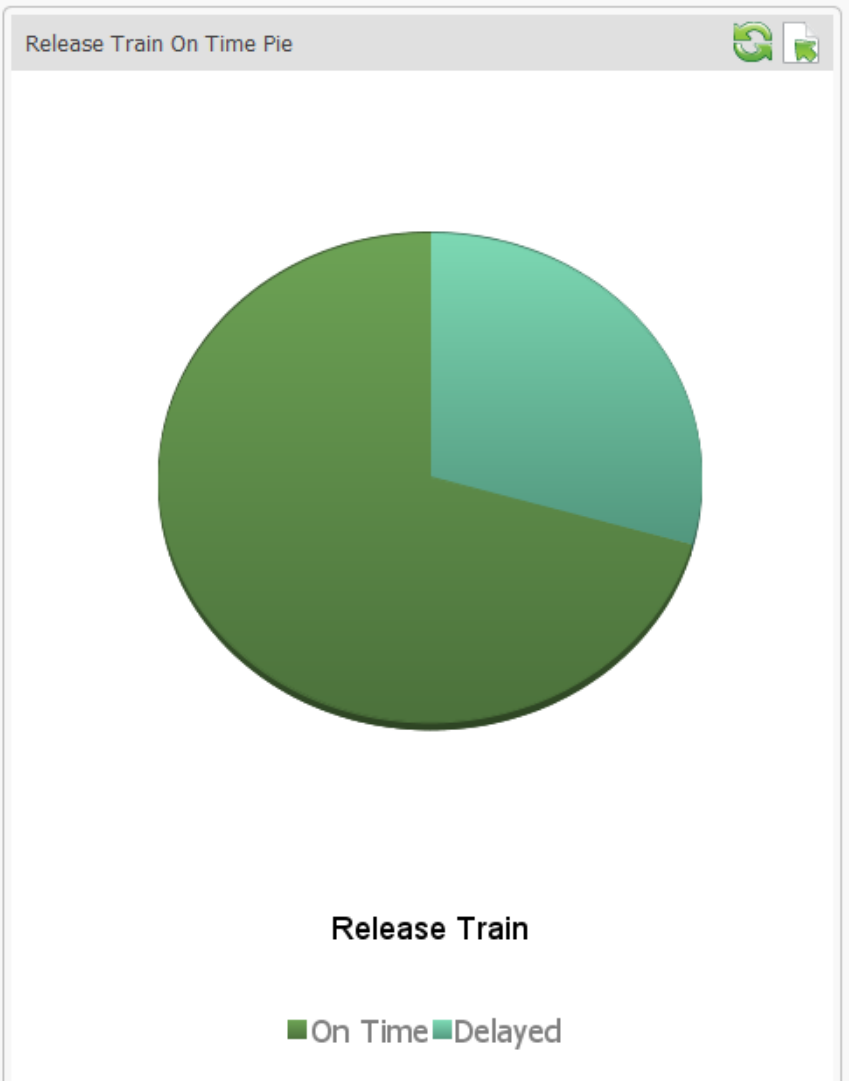


Deployment Tasks

The deployment tasks metrics is a tabular report of all current deployment tasks and their status. You can click a specific deployment task to display its application information.

Release Train on Time

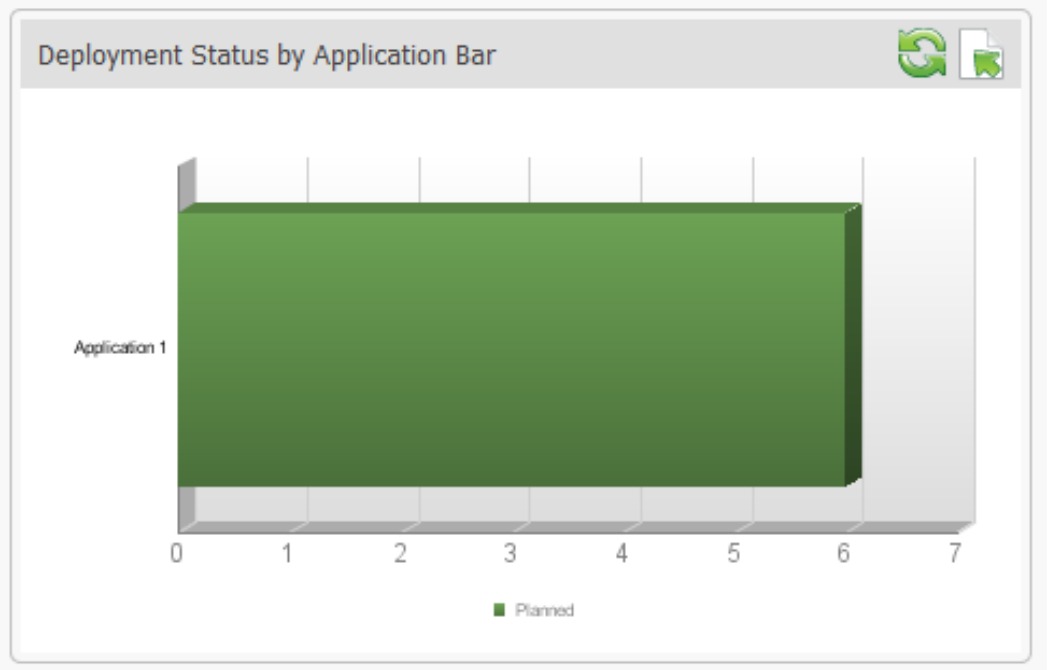
The Release Train on Time metric displays a pie chart that illustrates the number of release trains that are on time and that are delayed, as in the example below:



You can click the chart to display detailed information on status and deployment end-date for each release traiin.

Deployment Status by Application

You can display the specific status of deployment tasks in applications. For example, the following instance of the Deployment Status by Application Bar metric tells you that there are six tasks in the Planned stage associated with Application 1:

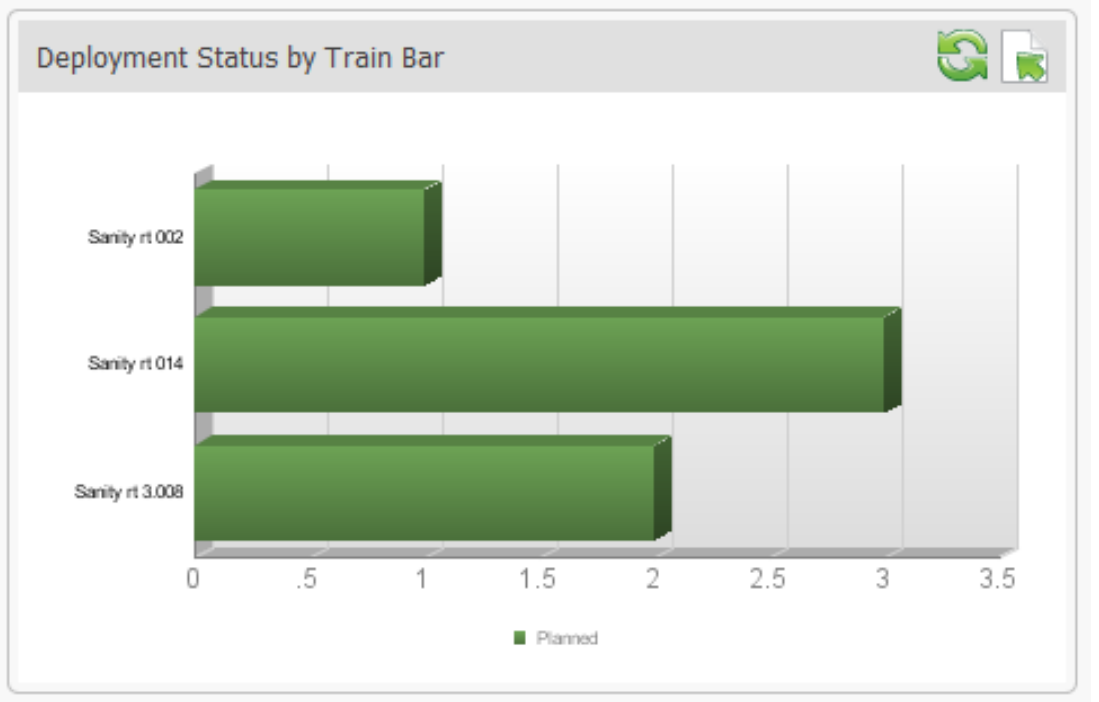


You can represent this data in a pie chart as well, and click a stage to display detailed tabular information about all deployment tasks.

Deployment Status by Train

With the Deployment Status by Train metric, you can display the specific status of a deployment task with a pie chart, bar chart, or tabular report. When you click the chart you can drill down into specific, detailed status information.

In the following example bar chart, you can see the number of open deployment tasks across three release trains. All of these tasks are in the Planned state.



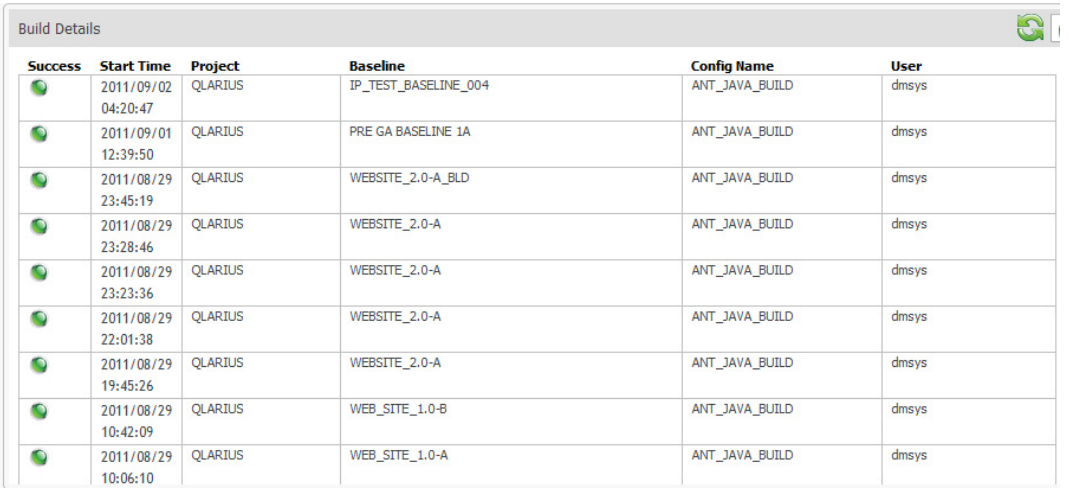
Out of Box Metrics for Serena Development Manager

Serena Dashboard includes metrics on several Key Performance Indicators (KPIs) and metrics that are relevant to most development organizations. These metrics are configured to work directly out-of-the-box with the default Development Manager configuration. The Dashboard pulls data from the following sources:

- The Development Control process apps running on SBM
- Dimensions CM, to display data on build success

Build Details

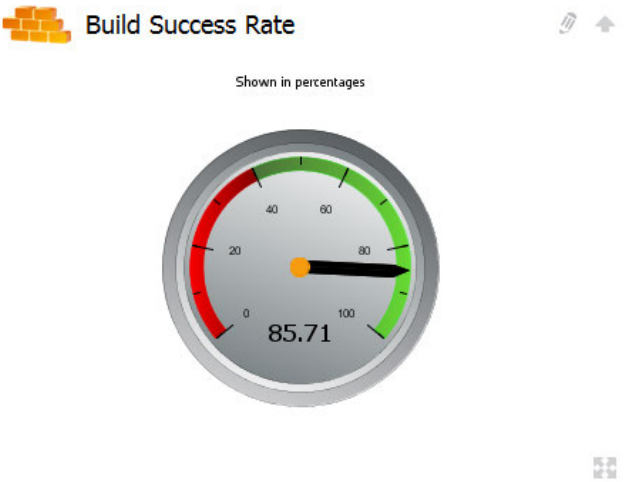
This metric displays detailed information on all builds, including success / fail, start time, project, and baseline.


Build Details

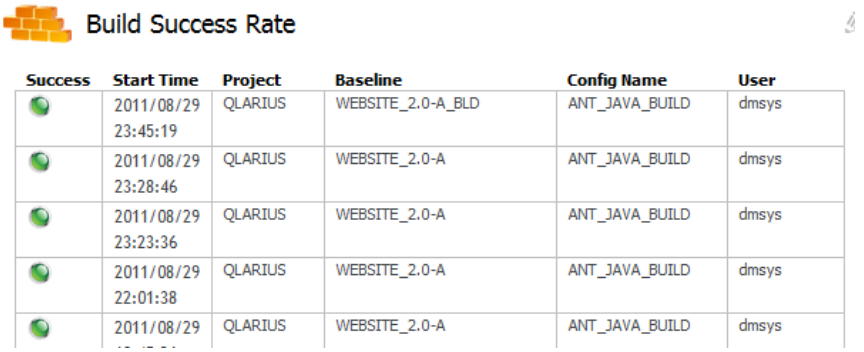
Success	Start Time	Project	Baseline	Config Name	User
	2011/09/02 04:20:47	QLARIUS	IP_TEST_BASELINE_004	ANT_JAVA_BUILD	dmsys
	2011/09/01 12:39:50	QLARIUS	PRE GA BASELINE 1A	ANT_JAVA_BUILD	dmsys
	2011/08/29 23:45:19	QLARIUS	WEBSITE_2.0-A_BLD	ANT_JAVA_BUILD	dmsys
	2011/08/29 23:28:46	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 23:23:36	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 22:01:38	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 19:45:26	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 10:42:09	QLARIUS	WEB_SITE_1.0-B	ANT_JAVA_BUILD	dmsys
	2011/08/29 10:06:10	QLARIUS	WEB_SITE_1.0-A	ANT_JAVA_BUILD	dmsys

Build Success Rate

This metric displays the percentage of builds that completed successfully. This data is pulled from Dimensions CM. For example:



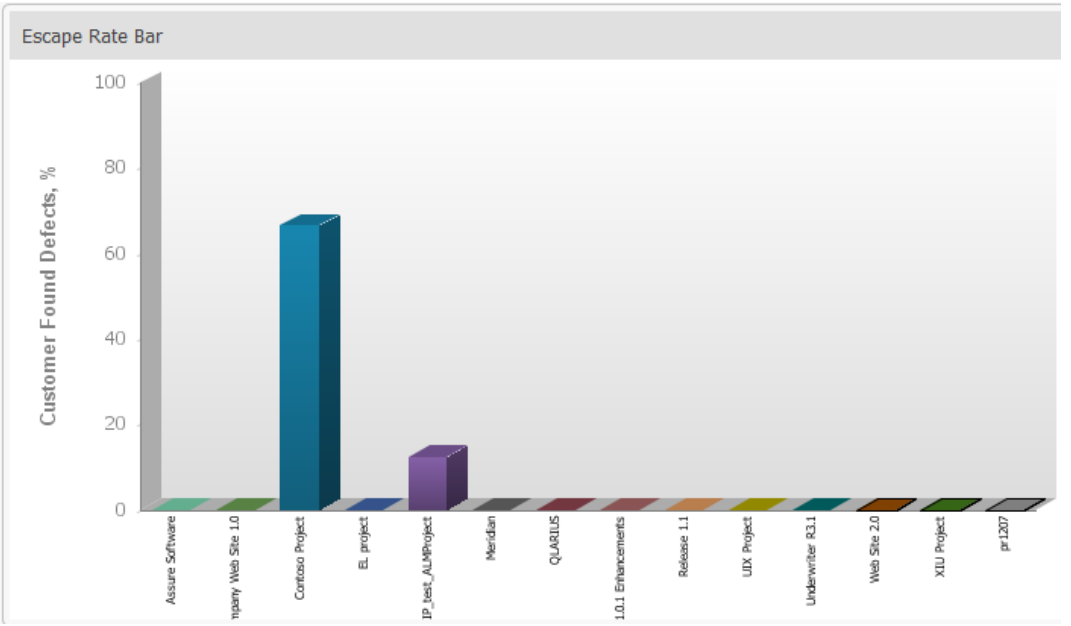
You can click the metric to see information about specific builds, including the name of the Dimensions CM build configuration, when the build stopped, and whether it succeeded.


Build Success Rate

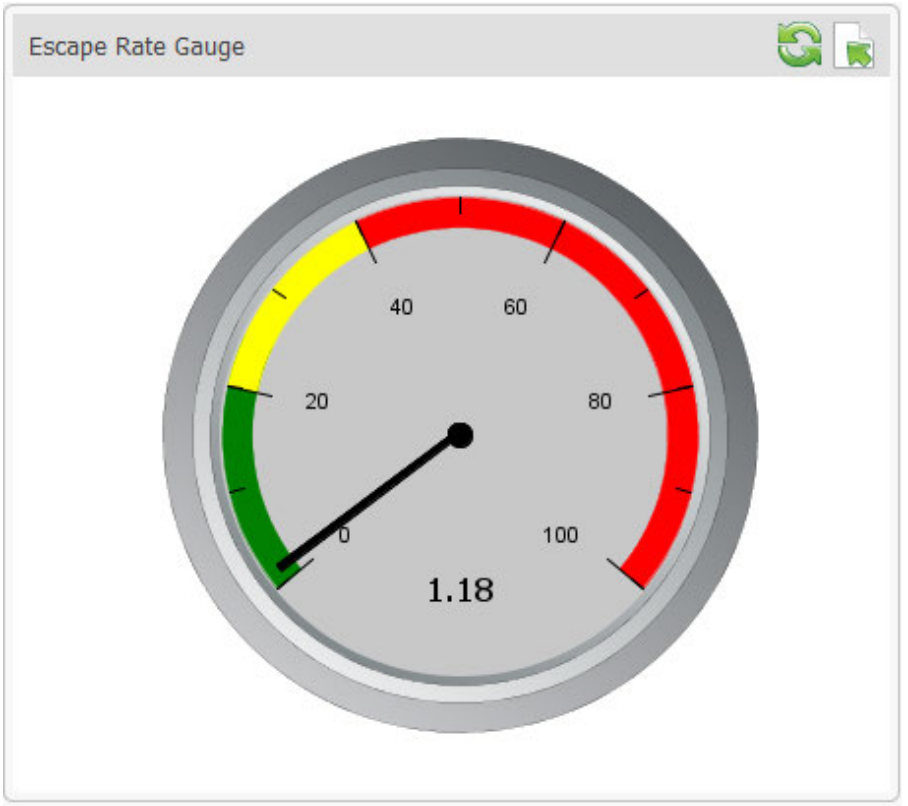
Success	Start Time	Project	Baseline	Config Name	User
	2011/08/29 23:45:19	QLARIUS	WEBSITE_2.0-A_BLD	ANT_JAVA_BUILD	dmsys
	2011/08/29 23:28:46	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 23:23:36	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29 22:01:38	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys
	2011/08/29	QLARIUS	WEBSITE_2.0-A	ANT_JAVA_BUILD	dmsys

Defect Escape Rate

This metric displays the percentage of defects that are escaped. These are defects that were reported by users or customers, that were not found by internal testing.

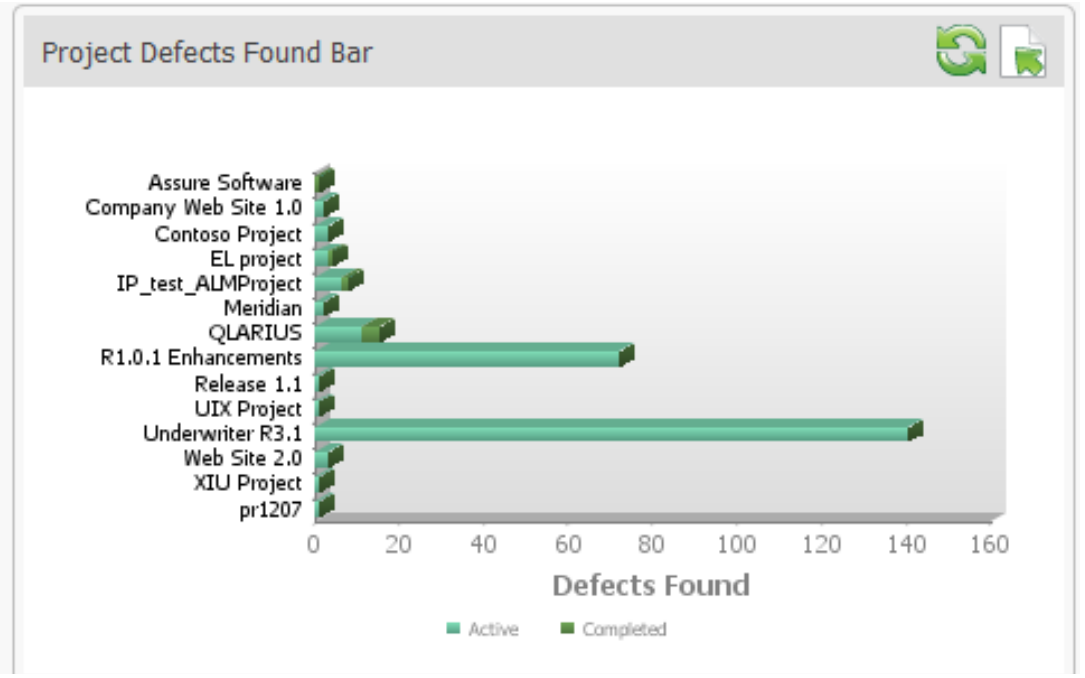


You can also display a Defect Escape Rate Gauge, which shows you the total number of escaped defects across your applications. In this example, there are very few escape defects.



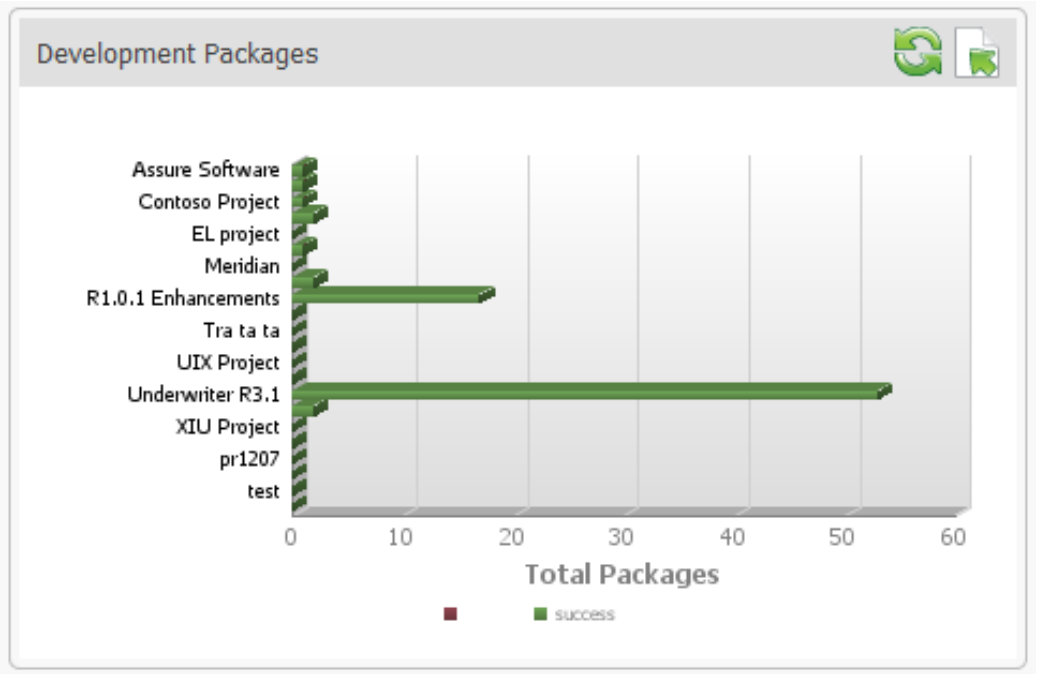
Project Defects Found / Project Defects By Month

These metrics (*Project Defects Found* and *Project Defects by Month*) display, in different colors, the number of active and inactive defects either for particular projects, or found on from month to month. The following is an example of Projects Defects Found.



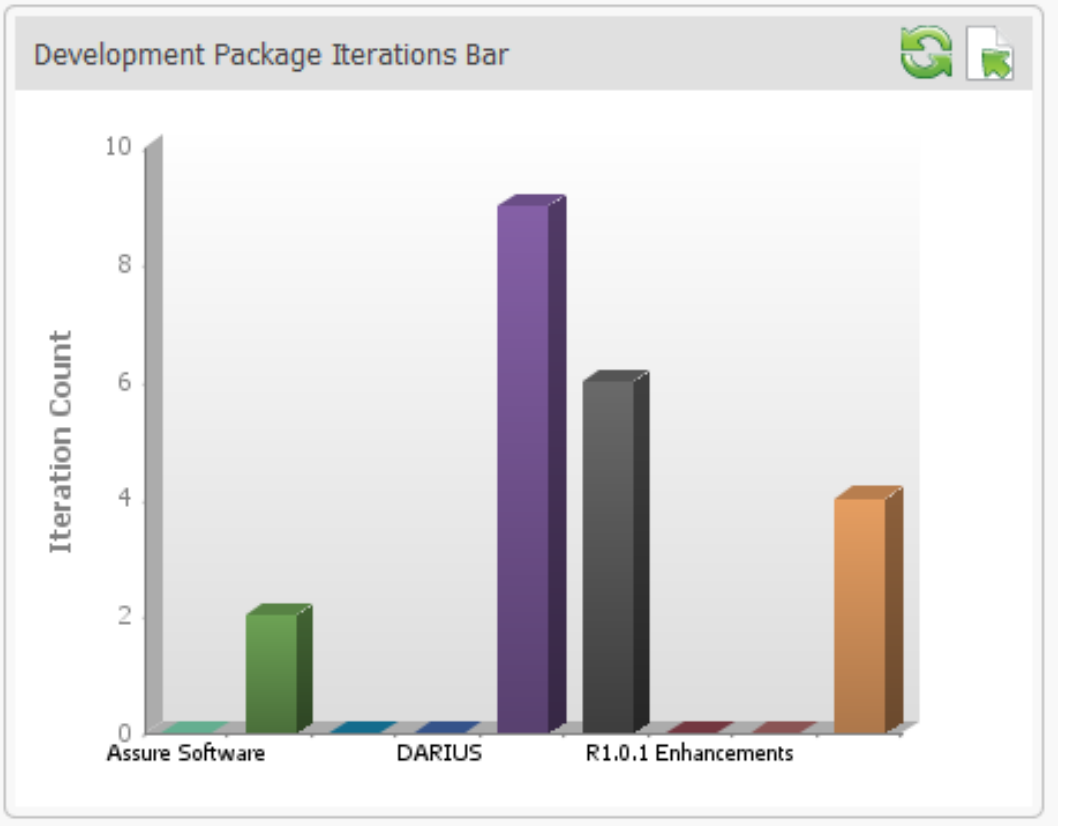
Development Packages

This metric lists the number of development packages in each project defined in ALM Projects. These packages are associated from the Dev Packages process app.

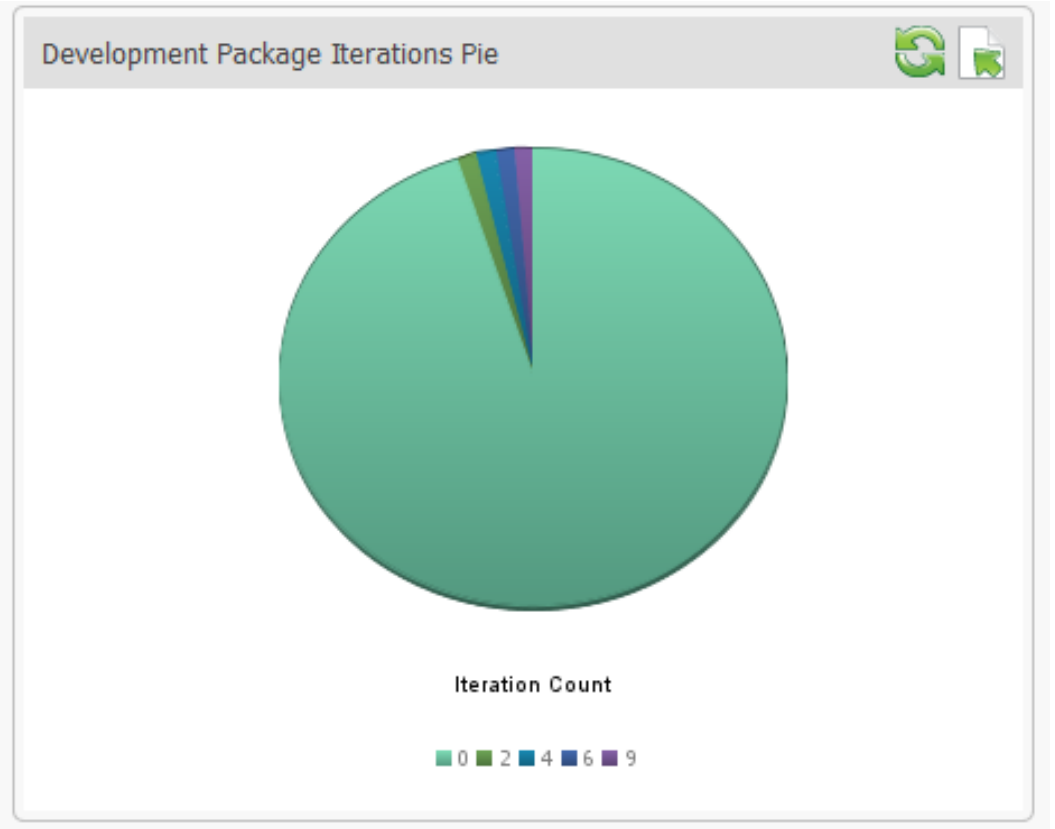


Development Packages Iterations

This metric displays the number of iterations that a development package has undertaken. You can display this data as a bar chart:

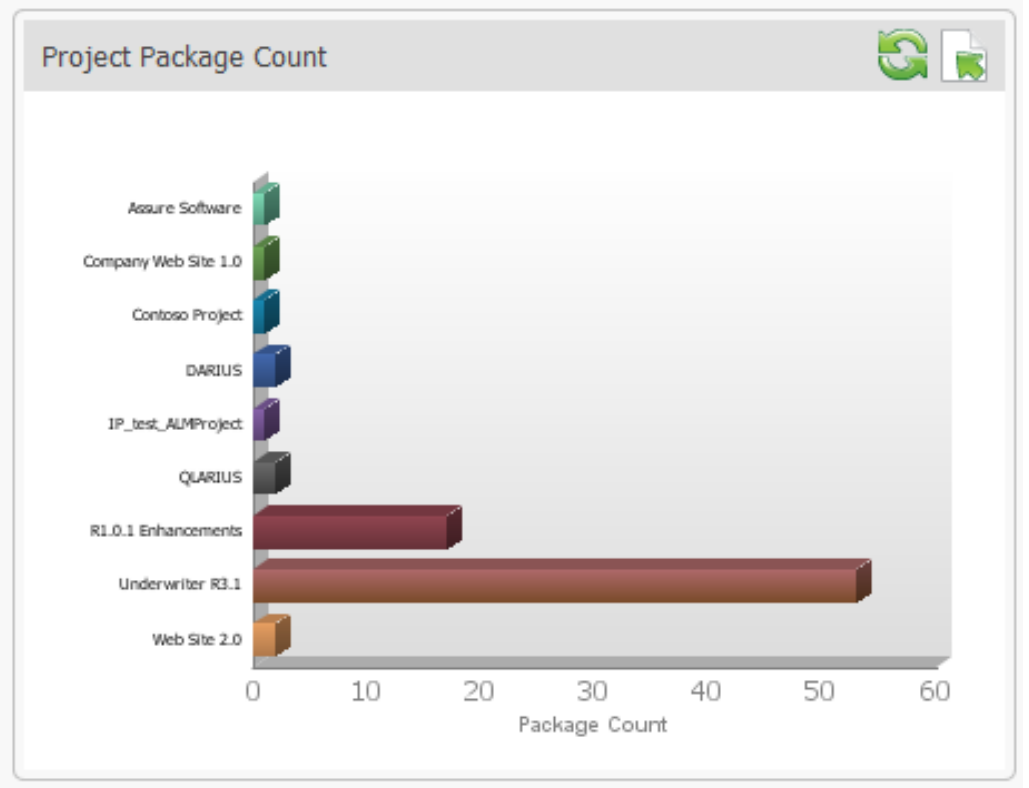


You can also display this data as a pie chart:

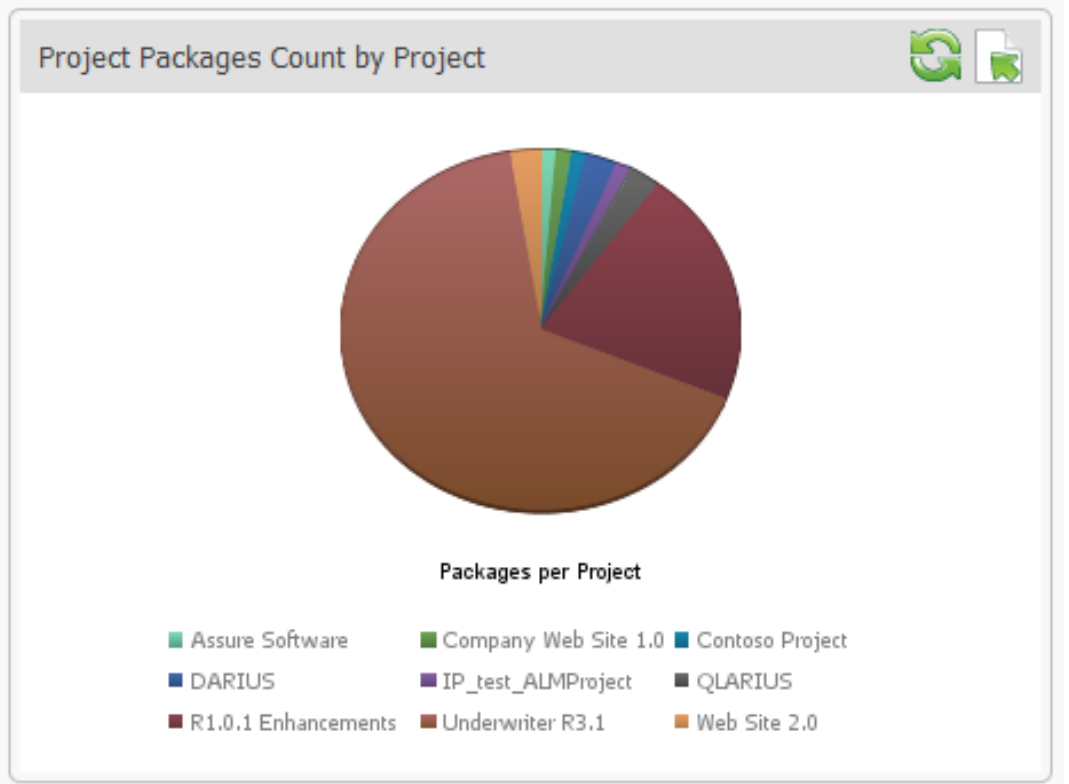


Project Packages Count

The Project Packages Count metric displays the total number of development packages contained in each project. You can display this data in a bar chart:



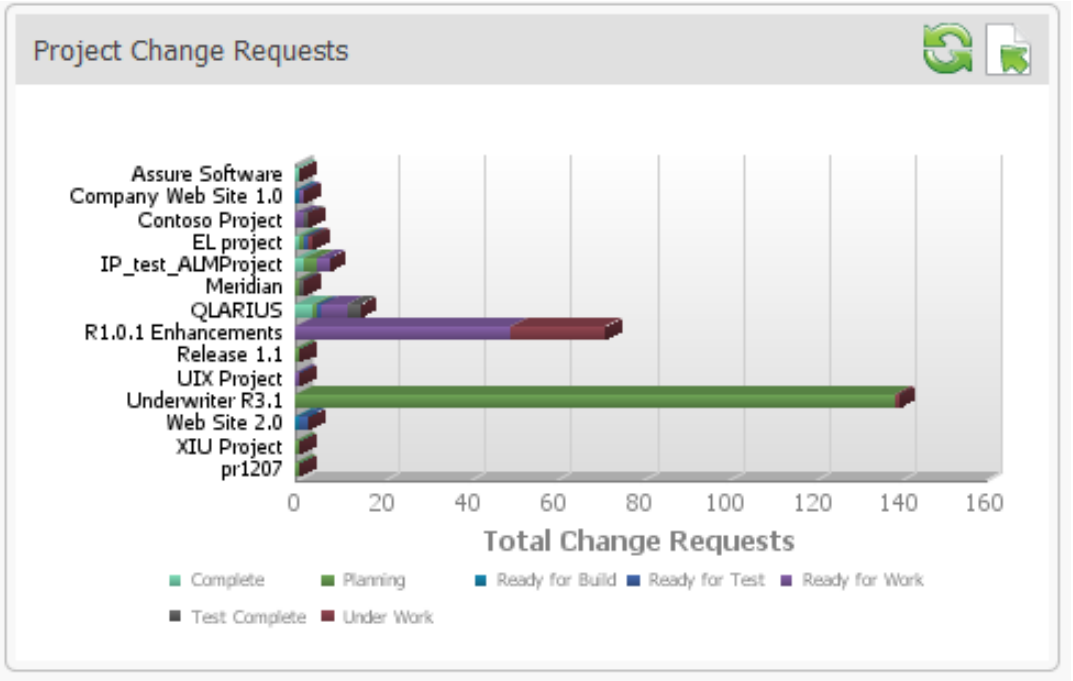
You can also display this data in a pie chart.



Project Change Requests

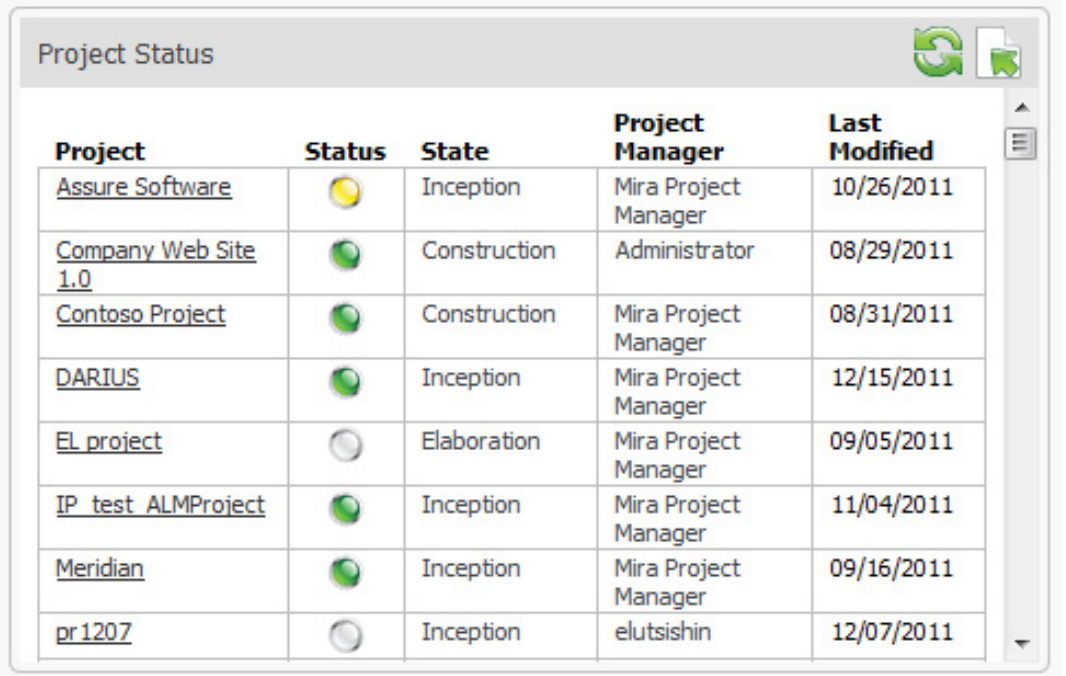
This metric displays the number of open change requests against projects defined in ALM Projects. The change request count is pulled from the Dev Change Requests process app.

The change requests are color-coded according to their current state, such as Planning, Ready for Build, Ready for Work, and Complete.



Project Status

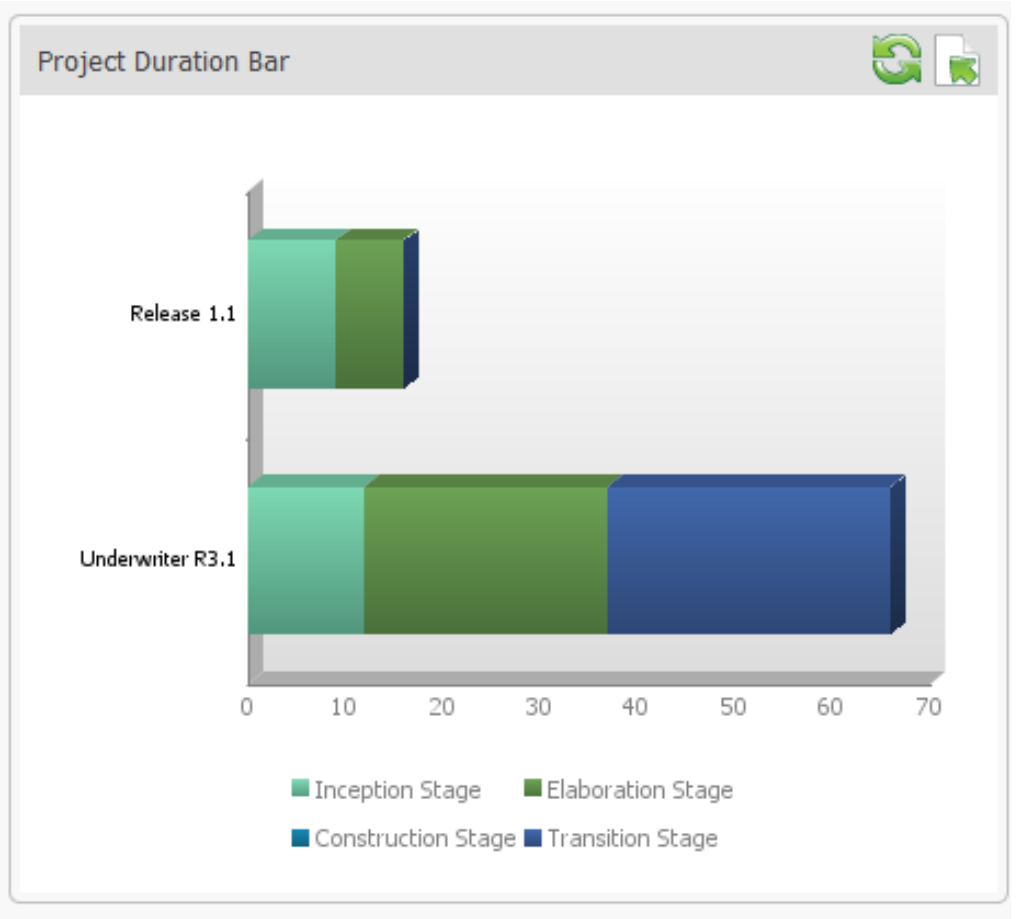
The Project Status metric lists all current projects in the ALM Projects process app and displays their status as green, red, or yellow. This metric also lists the state that the project is currently in. You can click a project name to drill down into project state, start date, and end date.



Project	Status	State	Project Manager	Last Modified
Assure Software		Inception	Mira Project Manager	10/26/2011
Company Web Site 1.0		Construction	Administrator	08/29/2011
Contoso Project		Construction	Mira Project Manager	08/31/2011
DARIUS		Inception	Mira Project Manager	12/15/2011
EL project		Elaboration	Mira Project Manager	09/05/2011
IP_test_ALMProject		Inception	Mira Project Manager	11/04/2011
Meridian		Inception	Mira Project Manager	09/16/2011
pr1207		Inception	elutsishin	12/07/2011

Project Duration

The Project Duration metric displays the number of days that projects has spent in each phase of the development lifecycle. You can display this data in a bar chart, such as the following:

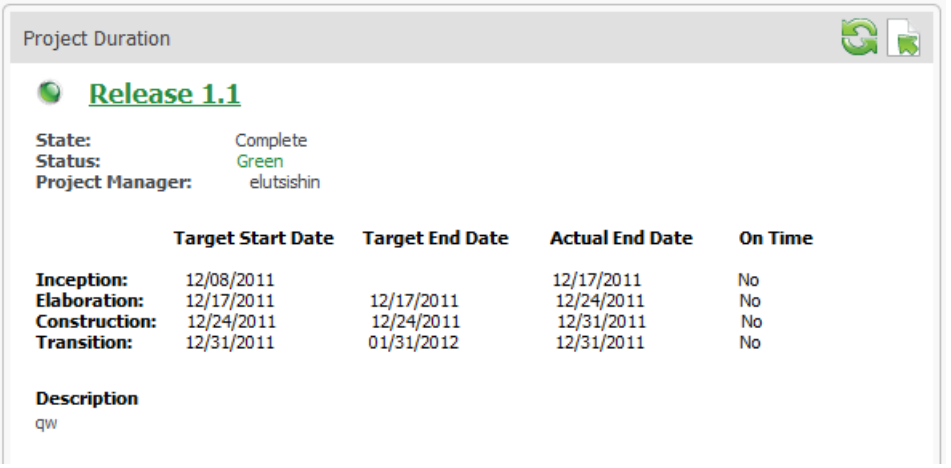


You can display this data in tabular format as well:

Project Duration

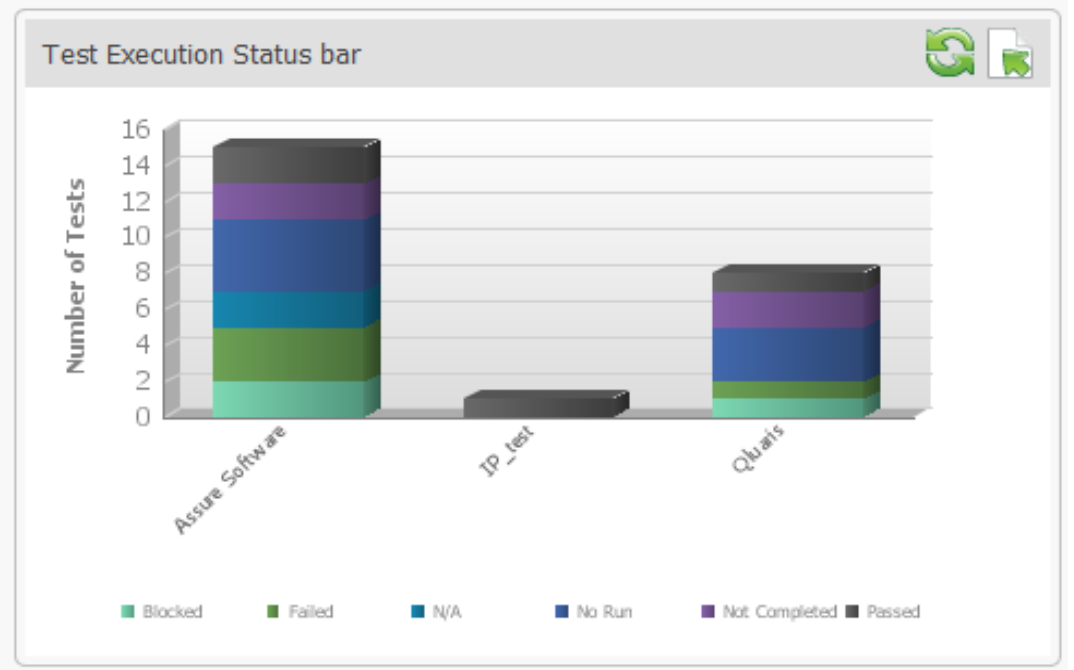
Projects	Inception Stage	Elaboration Stage	Constuction Stage	Transition Stage
Underwriter R3.1	6	0	0	0
Underwriter R3.1	6	25	0	29
Release 1.1	9	7	0	0

The Release 1.1 project spent 9 days in the Inception stage and 7 days in the elaboration stage. Click any project name to detailed start and end dates for each phase:

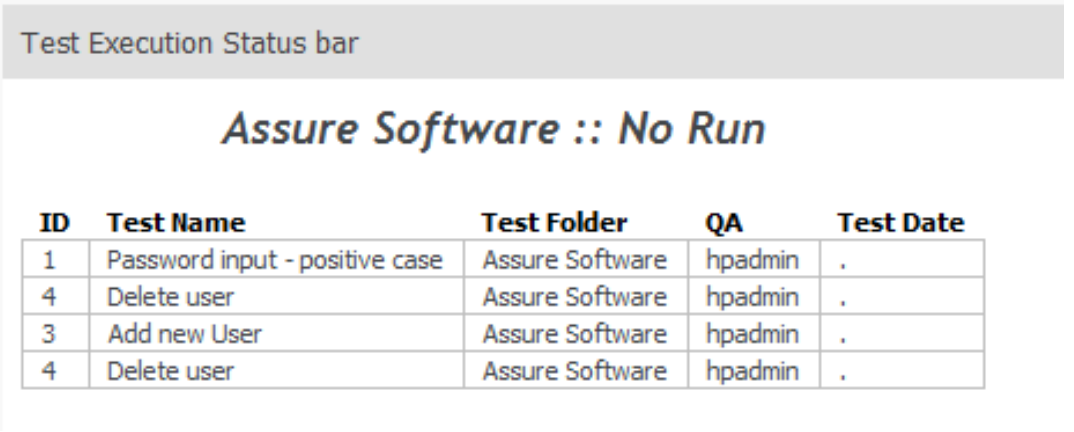


Test Execution Status Bar

The Test Execution Status Bar metric provides a visual over view of the total number of tests and their status in each project, For example, in the following, you can see that there are two blocked tests (light green-blue) in the Assure Software project, and another two that have passed (black):



You can click any segment in the chart to see details on specific tests.



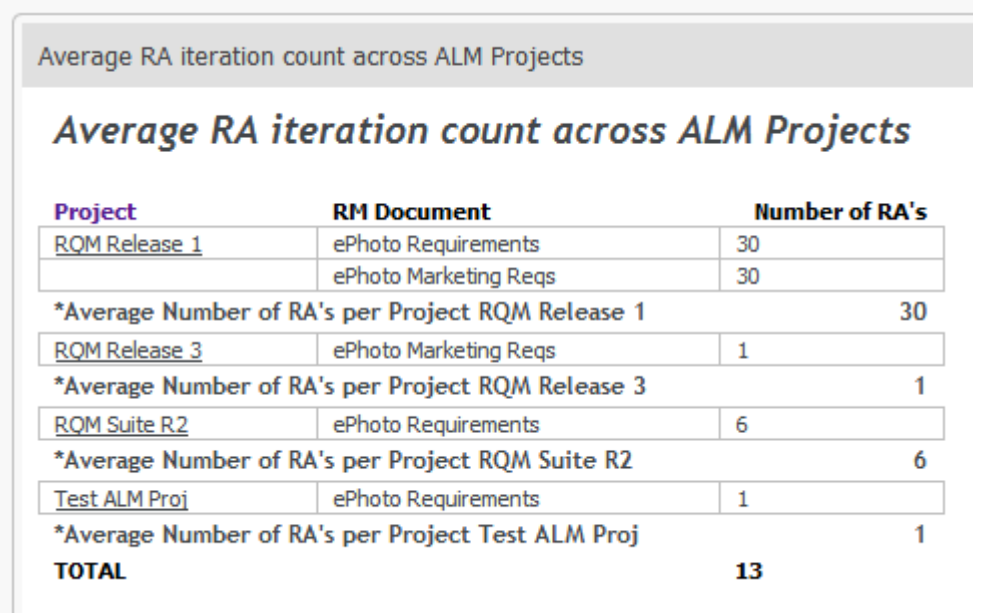
Out of Box Metrics for Serena Requirements Manager

Serena Dashboard includes metrics on several Key Performance Indicators (KPIs) and metrics that are relevant to Product Managers who are responsible for defining and driving requirements approvals for new development. These metrics are configured to work directly out-of-the-box with the default Serena Requirements Manager configuration. The Dashboard pulls data from the following sources:

- The Requirements Manager process apps running on SBM
- Dimensions RM

Average Requirement Approval Iteration Count Across Projects

This metric displays a list of all projects, and the number of requirement approvals that have been tracked against each requirements document in that project.



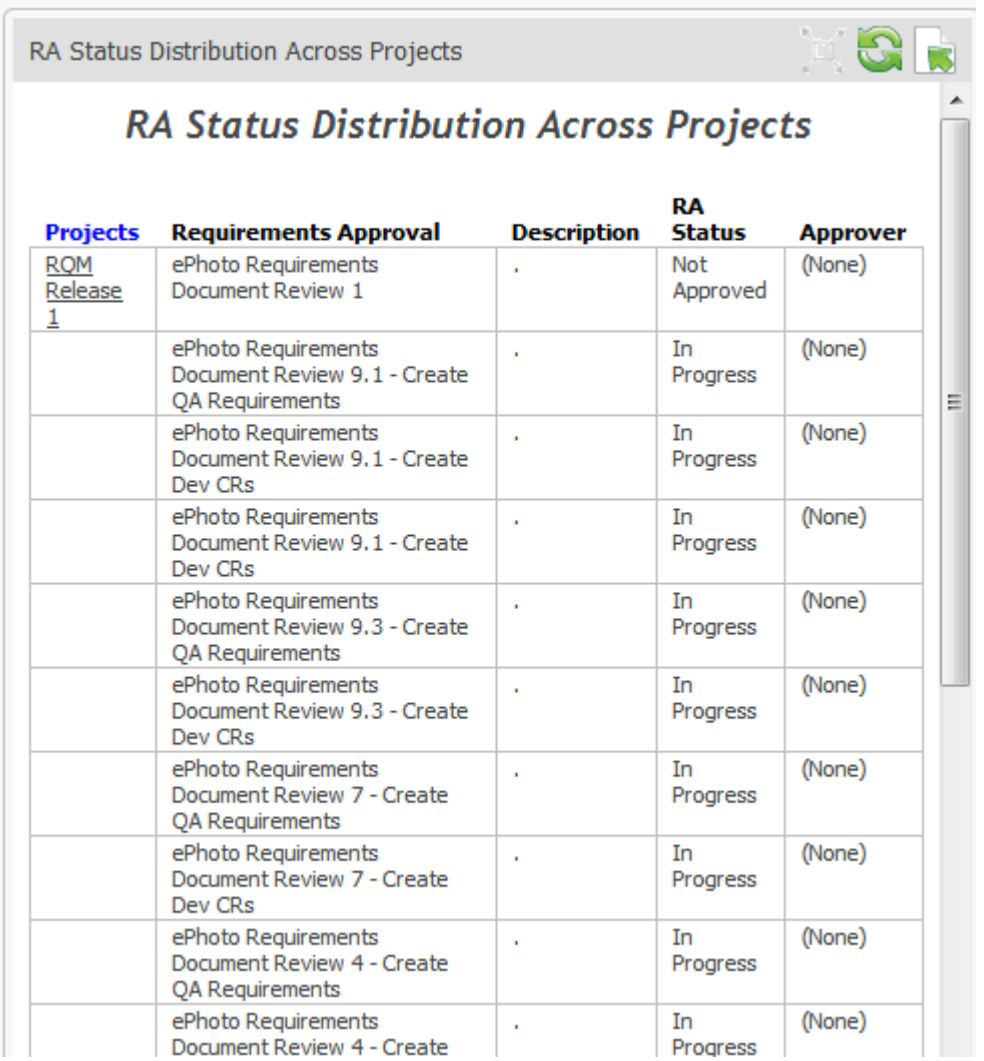
Average RA iteration count across ALM Projects

Average RA iteration count across ALM Projects

Project	RM Document	Number of RA's
RQM Release 1	ePhoto Requirements	30
	ePhoto Marketing Reqs	30
*Average Number of RA's per Project RQM Release 1		30
RQM Release 3	ePhoto Marketing Reqs	1
*Average Number of RA's per Project RQM Release 3		1
RQM Suite R2	ePhoto Requirements	6
*Average Number of RA's per Project RQM Suite R2		6
Test ALM Proj	ePhoto Requirements	1
*Average Number of RA's per Project Test ALM Proj		1
TOTAL	**13**	

Requirement Approval Status Distribution Across Projects

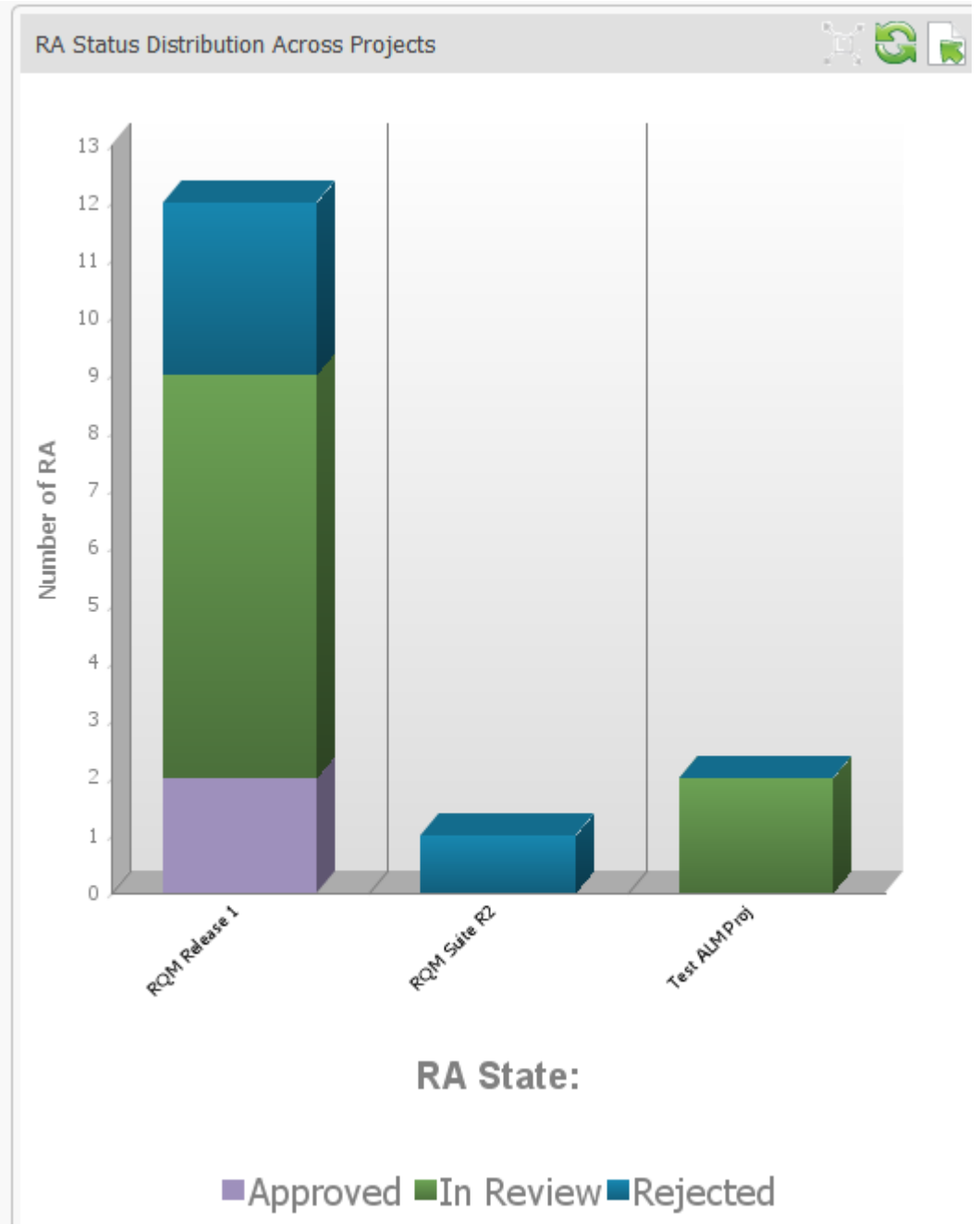
This metric displays the approval status of requirements approvals across all projects. You can display this in a table, as in the following example.


RA Status Distribution Across Projects

RA Status Distribution Across Projects

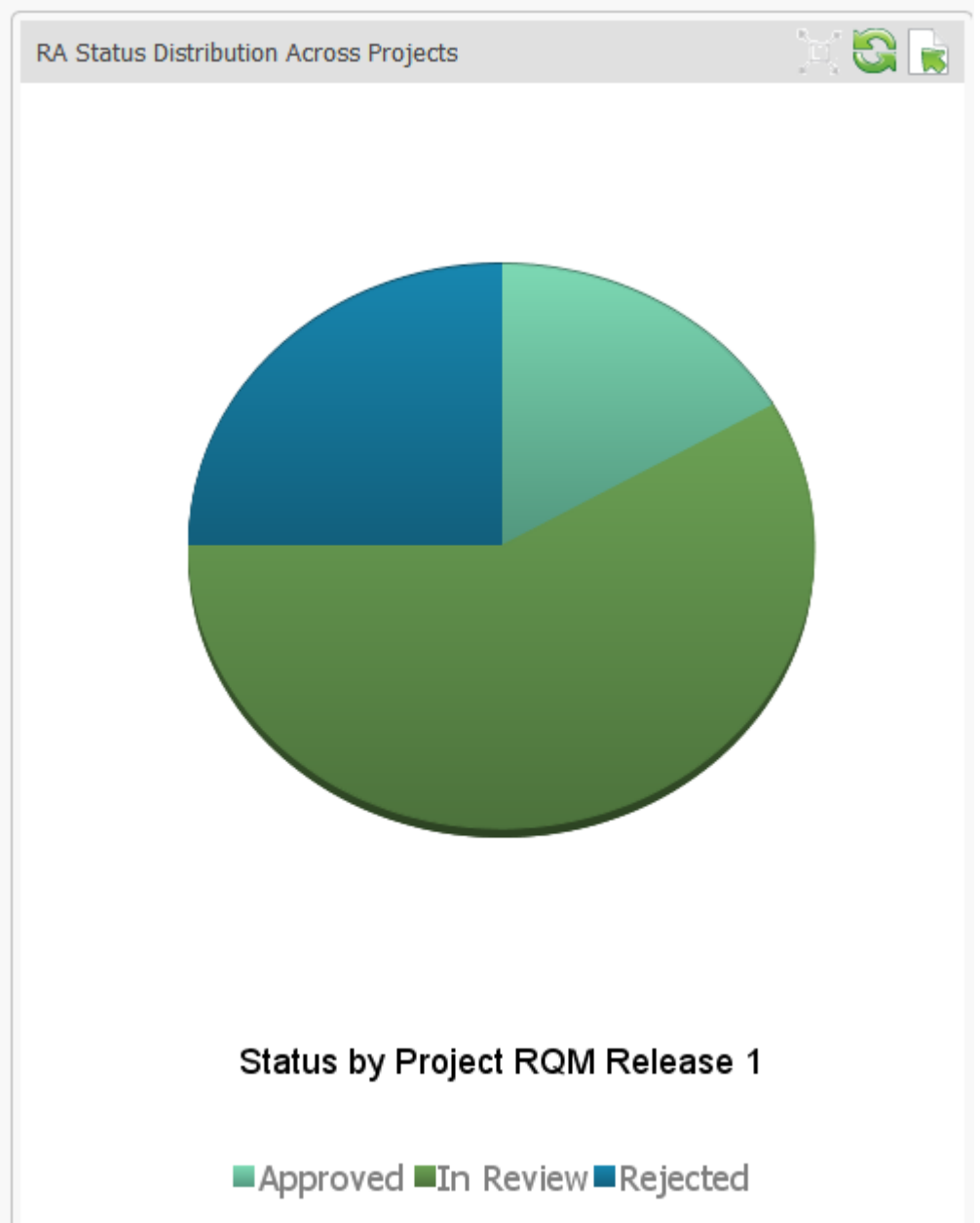
Projects	Requirements Approval	Description	RA Status	Approver
RQM Release 1	ePhoto Requirements Document Review 1	.	Not Approved	(None)
	ePhoto Requirements Document Review 9.1 - Create QA Requirements	.	In Progress	(None)
	ePhoto Requirements Document Review 9.1 - Create Dev CRs	.	In Progress	(None)
	ePhoto Requirements Document Review 9.1 - Create Dev CRs	.	In Progress	(None)
	ePhoto Requirements Document Review 9.3 - Create QA Requirements	.	In Progress	(None)
	ePhoto Requirements Document Review 9.3 - Create Dev CRs	.	In Progress	(None)
	ePhoto Requirements Document Review 7 - Create QA Requirements	.	In Progress	(None)
	ePhoto Requirements Document Review 7 - Create Dev CRs	.	In Progress	(None)
	ePhoto Requirements Document Review 4 - Create QA Requirements	.	In Progress	(None)
	ePhoto Requirements Document Review 4 - Create	.	In Progress	(None)

You can also display this in a bar chart.



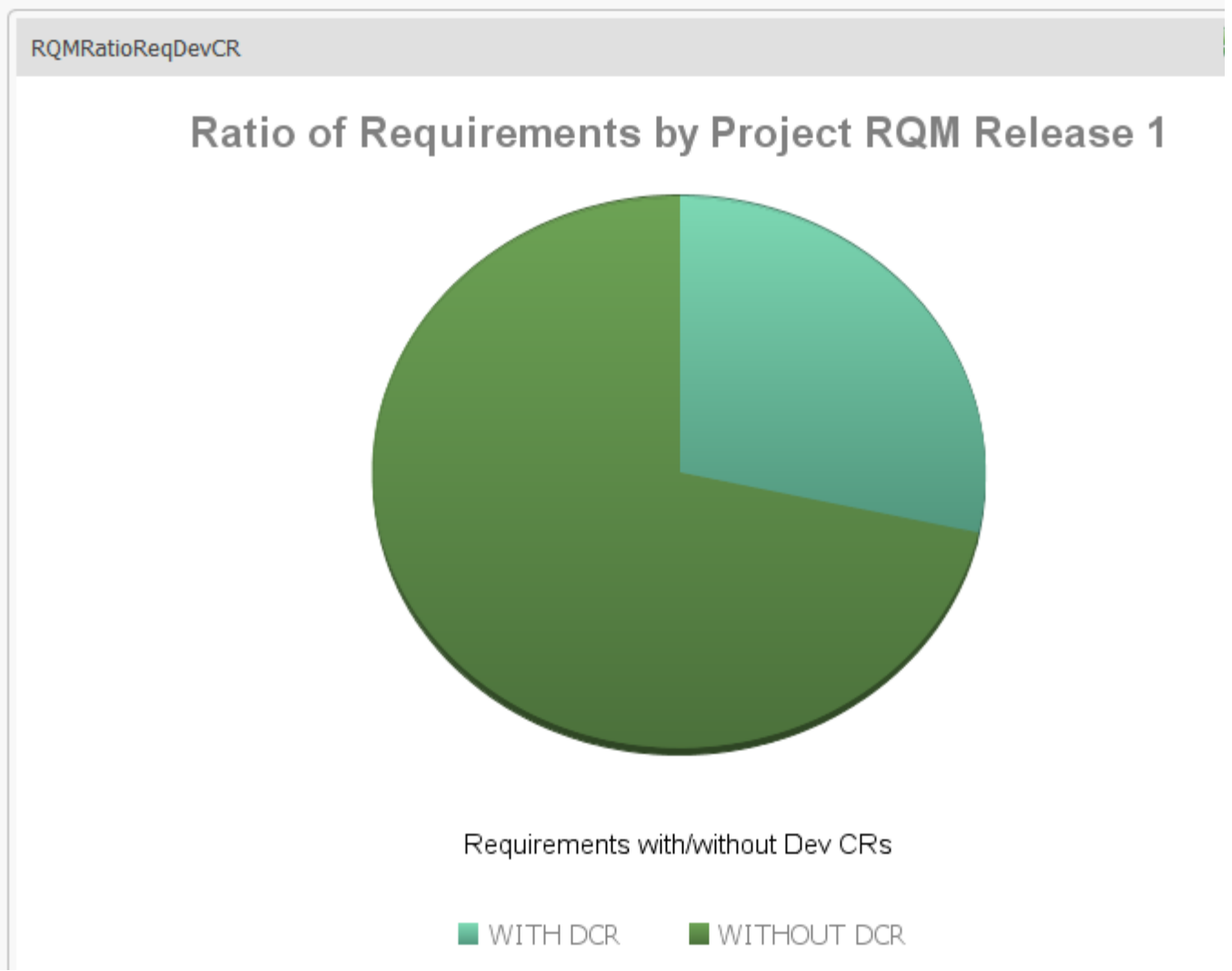
Requirement Approval Status Distribution for a Project

The Requirement Approval Status Distribution pie chart visualizes the percentage of approvals in each status.



Ratio of Requirements to Development Change Requests

This pie chart visualizes the number of requirements that are / are not related to development change requests.

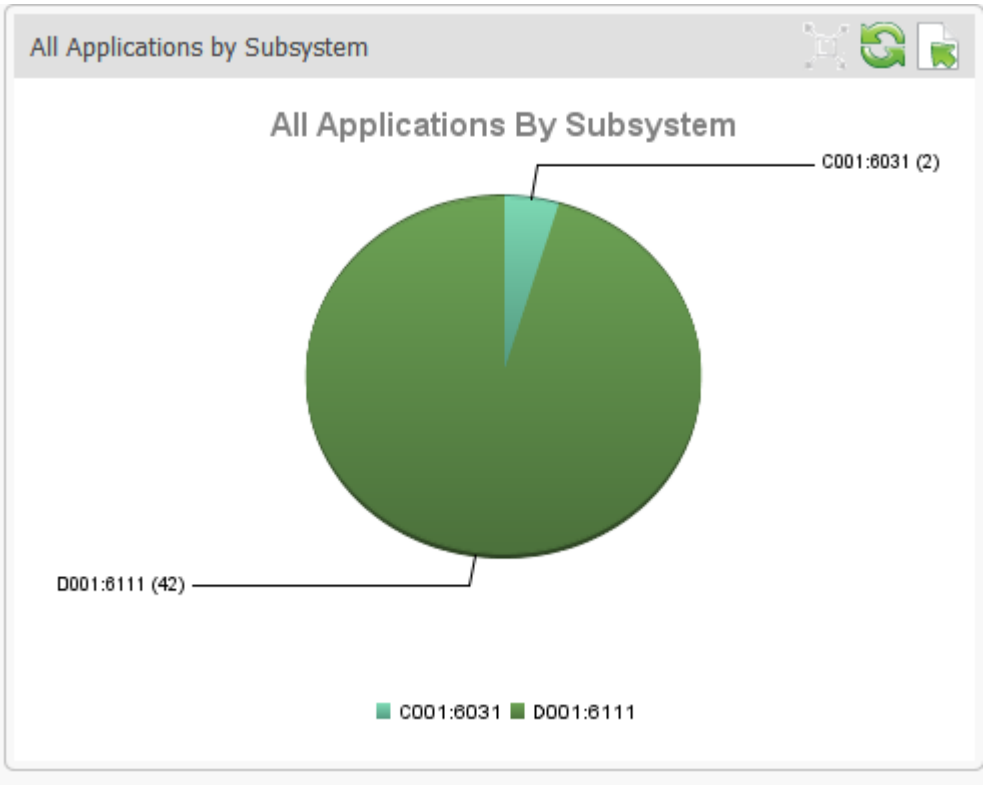


Out-of-Box Metrics for ChangeMan ZMF

Serena Dashboard includes metrics on several Key Performance Indicators (KPIs) and metrics that report on Serena Changeman ZMF data.

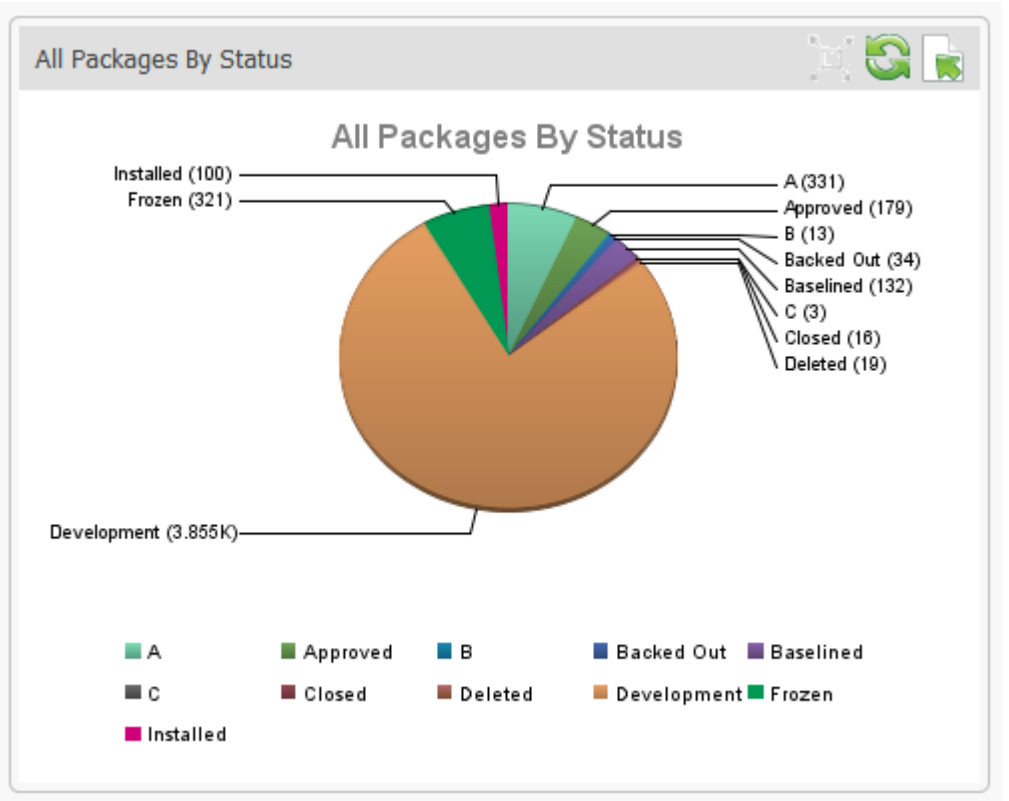
All Applications by Subsystem

This pie chart displays all applications broken down by specific sub-system.



All packages by Status

This pie chart displays all packages, broken down by their status (such as Installed, Frozen, and Approved).



All Packages by Application

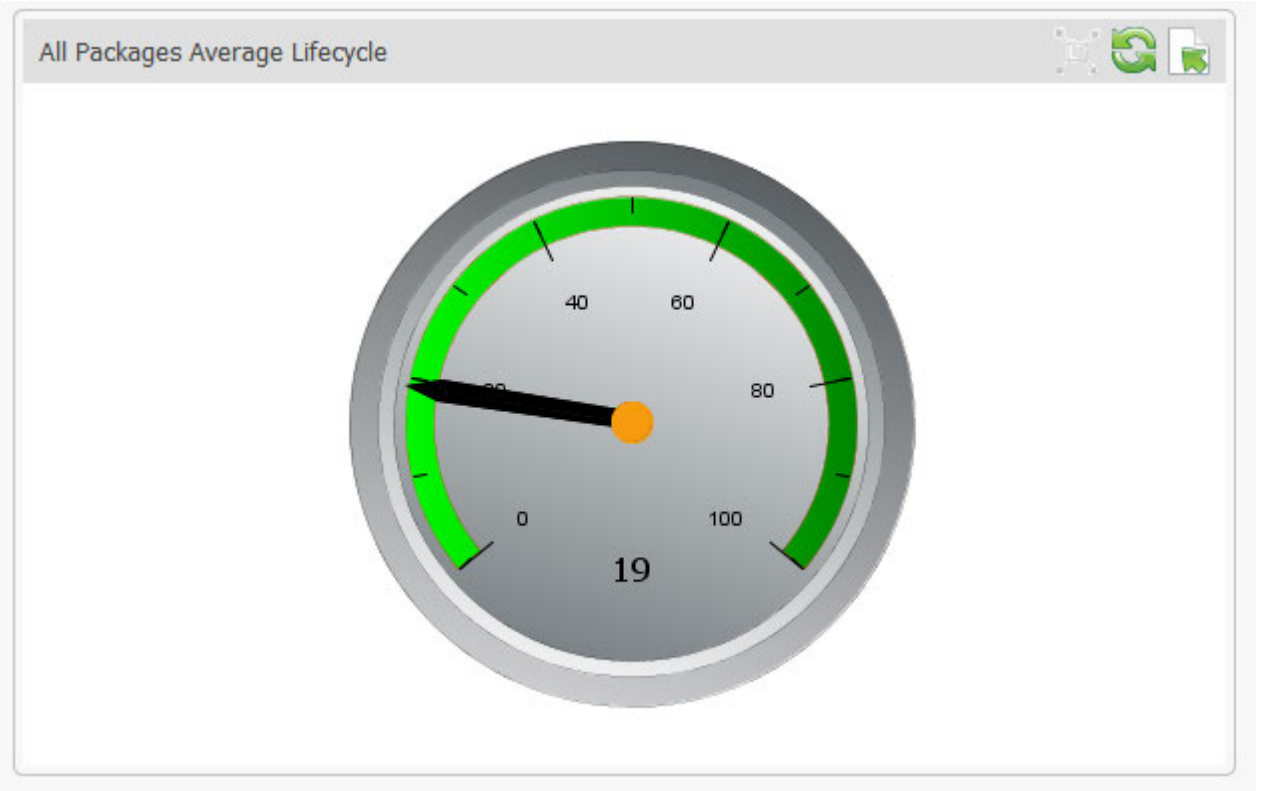
This metric displays data about all packages across each application in tabular format.

All Packages By Application

Server	Subsystem	Application	Open	Closed	Dev	Frozen	Approved	Rejected	Installed	Dist.	Baselined	Temp	Backed Out
d002:6657	C001:6031	ACTP	0	0	15	3	0	0	0	0	9	0	0
		JHFS	0	0	2	0	0	0	0	0	5	0	0
	D001:6111	#JH	0	0	27	7	1	0	0	0	0	0	0
		#JON	0	0	9	4	0	0	1	0	1	0	0
		$JON	0	0	34	0	0	0	0	0	0	0	1
		ALZ	0	1	20	9	0	0	1	0	1	0	2
		APS	0	0	142	0	0	0	2	0	0	0	0
		DANY	0	0	1	0	0	0	0	0	0	0	0
		DAVE	0	0	58	2	1	0	1	0	1	0	0
		DB2A	0	0	9	0	0	0	0	0	0	0	0
		DEMO	0	0	387	83	6	0	21	0	1	0	5
		ECOR	0	0	12	0	0	0	0	0	1	0	0
		ERDZ	0	0	1	0	0	0	0	0	1	0	0
		ERSE	0	0	2	0	0	0	0	0	1	0	0
		ESRV	0	0	2	0	0	0	0	0	1	0	0
		ETME	0	0	2	0	0	0	0	0	1	0	0
		FUTF	0	0	4	0	0	0	0	0	1	0	0

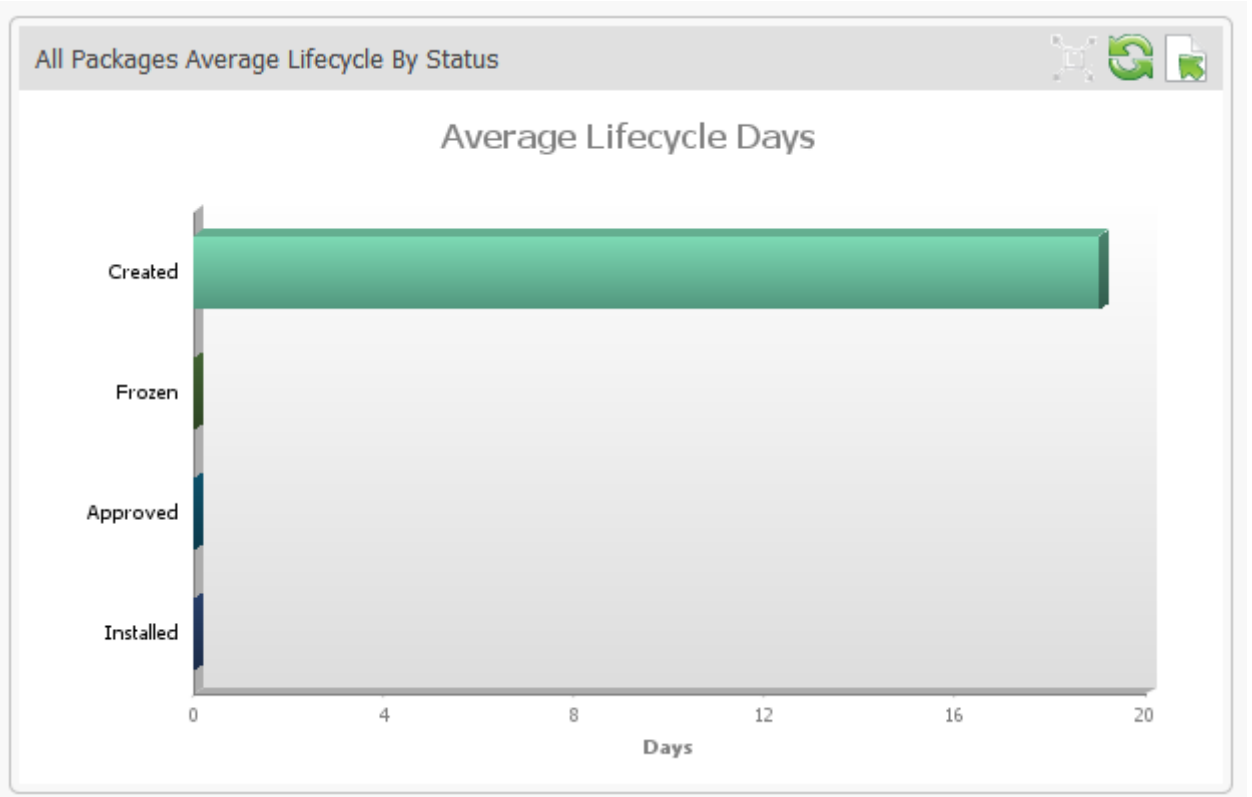
All Packages Average Lifecycle

This metric displays the average lifecycle span for all packages.



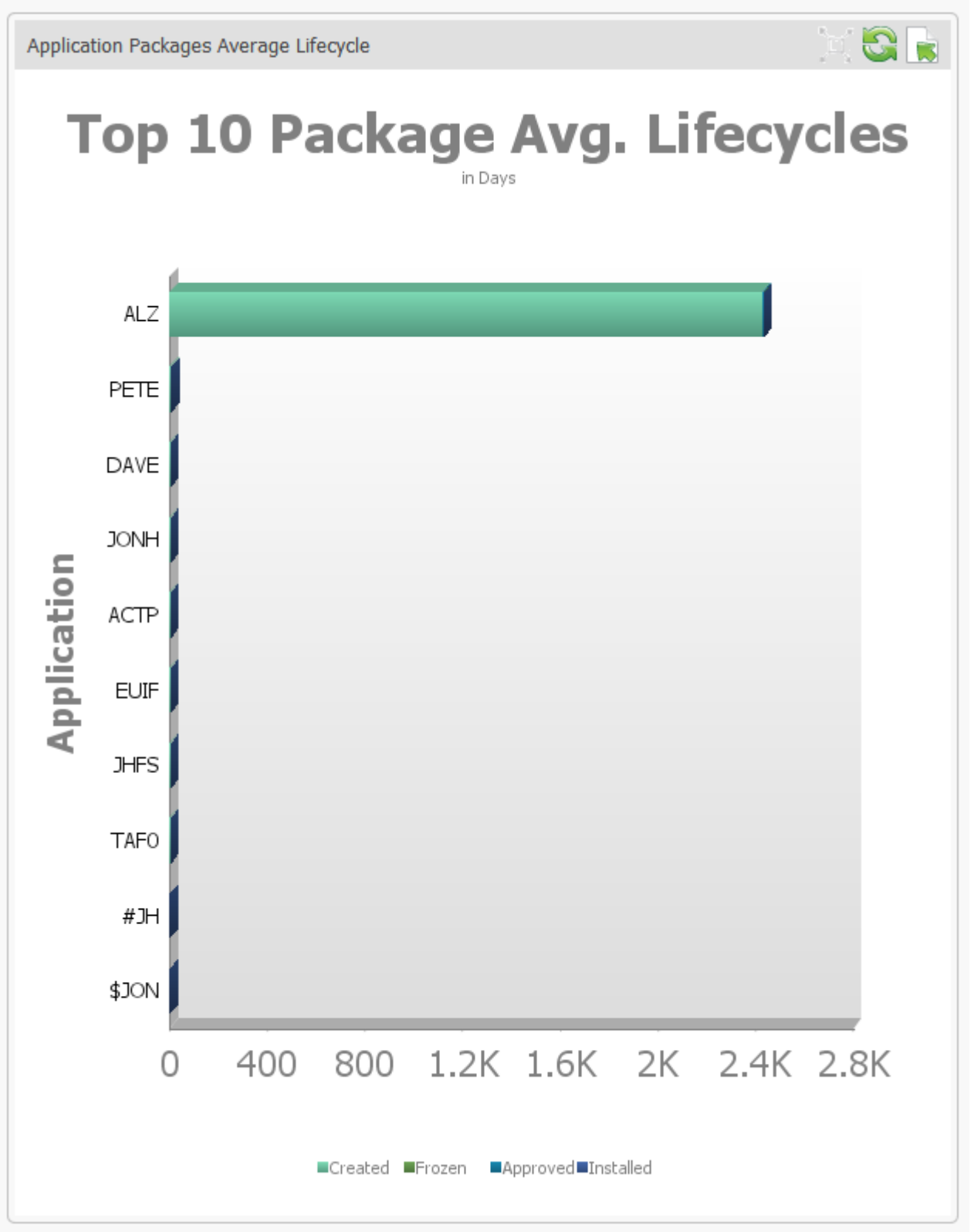
All Packages Average Lifecycle by Status

The metric displays the average lifecycle span, in days, for all packages broken down by status.



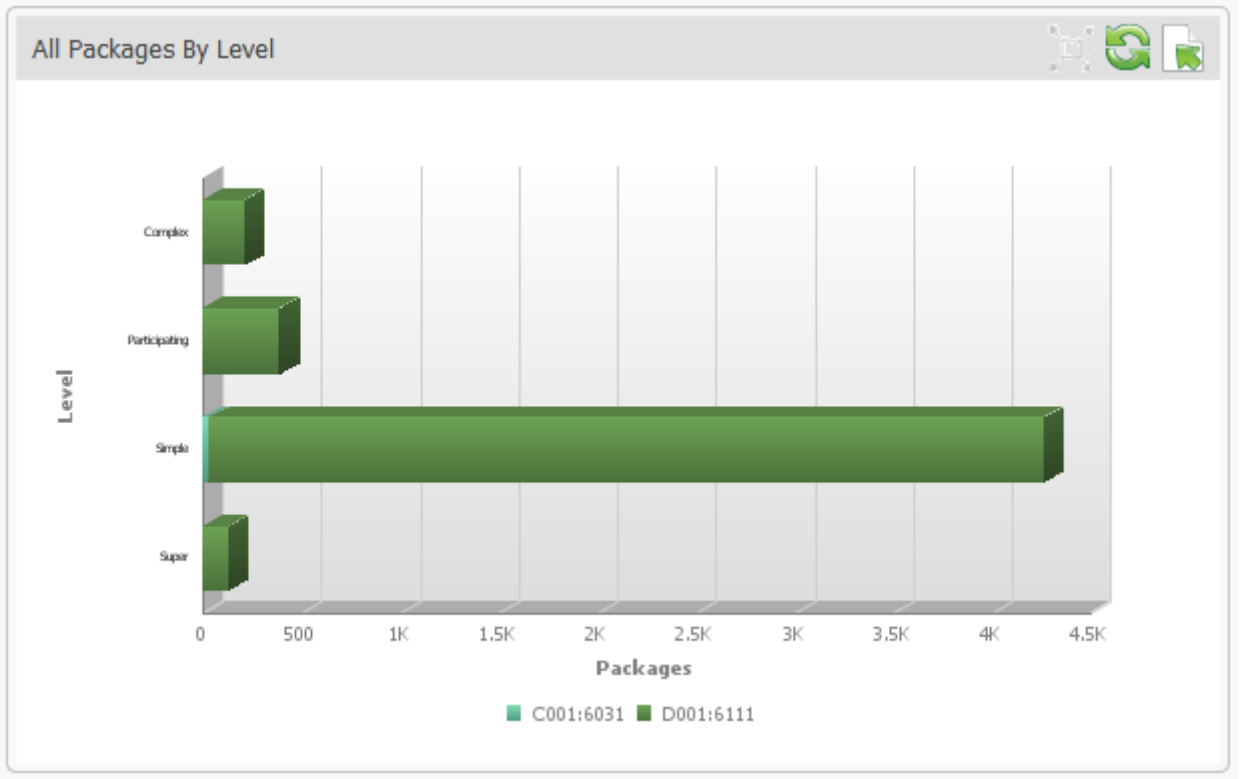
Application Packages Average Lifecycle

This metric displays the average lifecycle span, in days, for application packages.



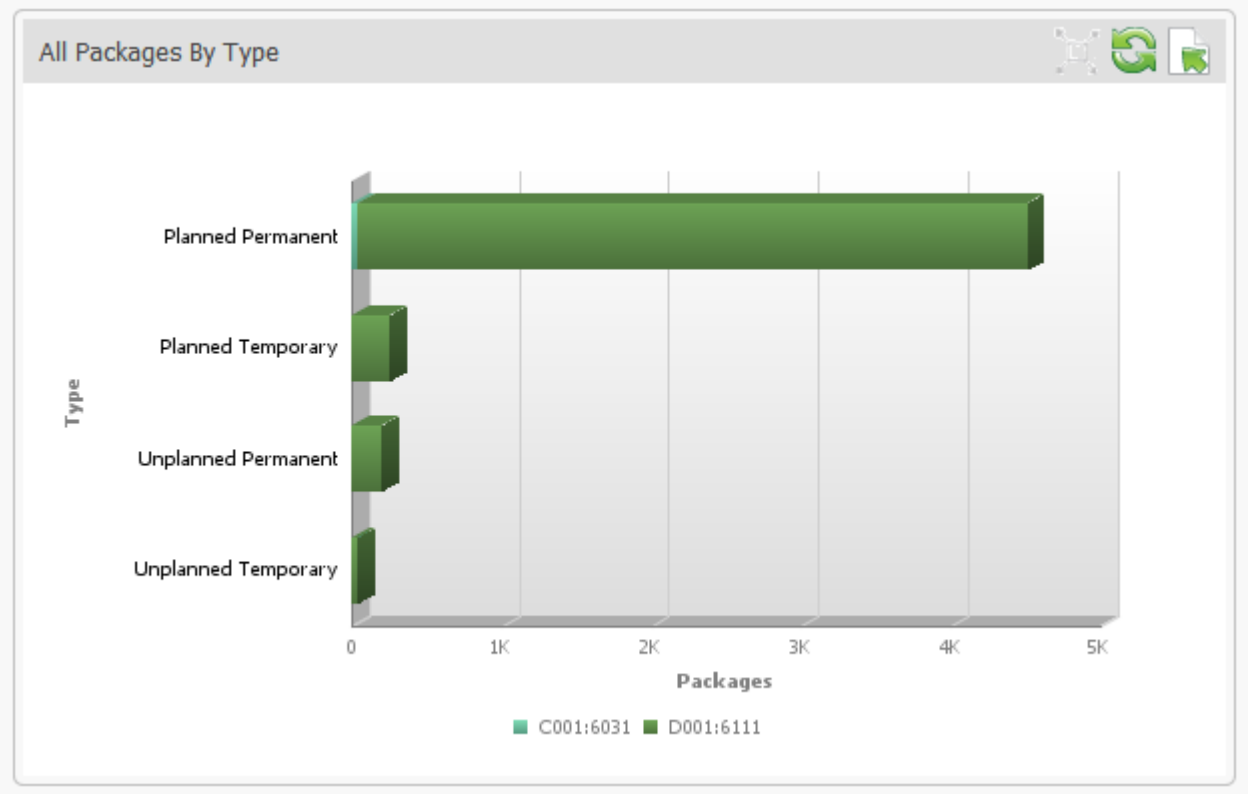
All Packages by Level

This metrics displays all packages, broken out by level.



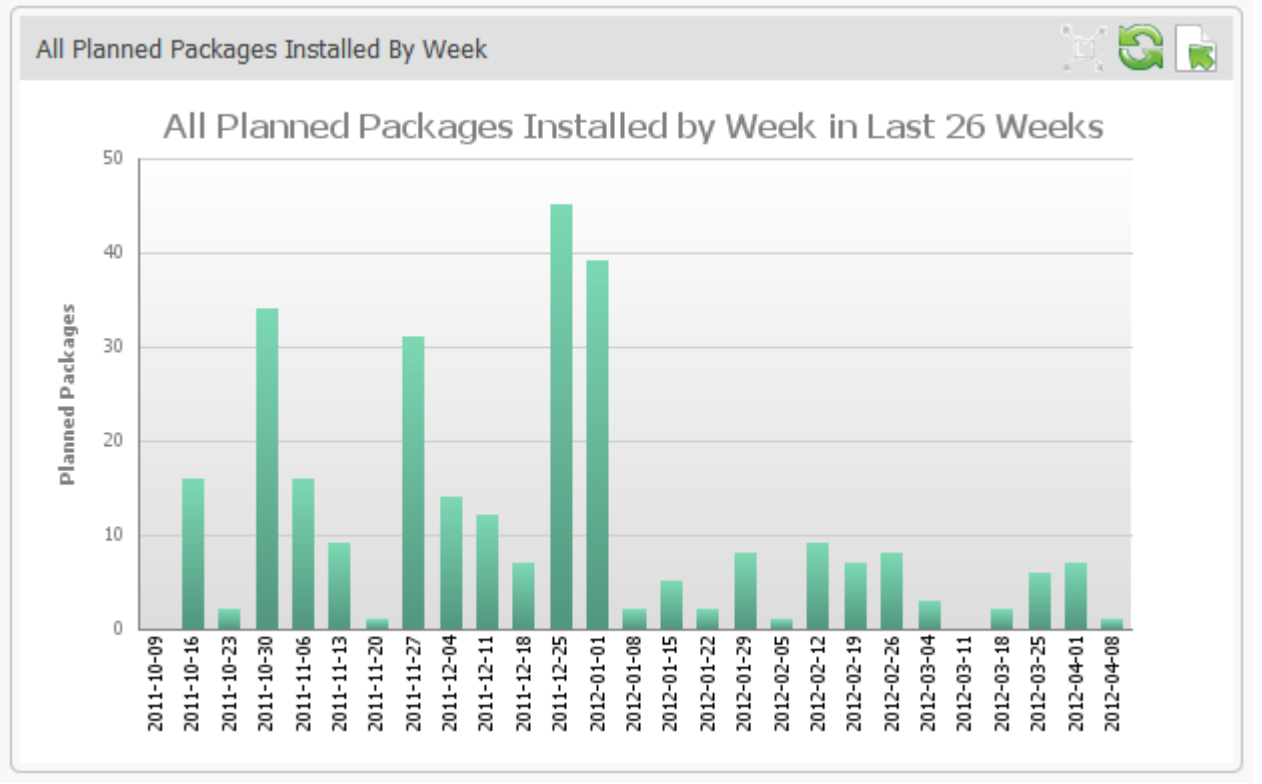
All Packages by Type

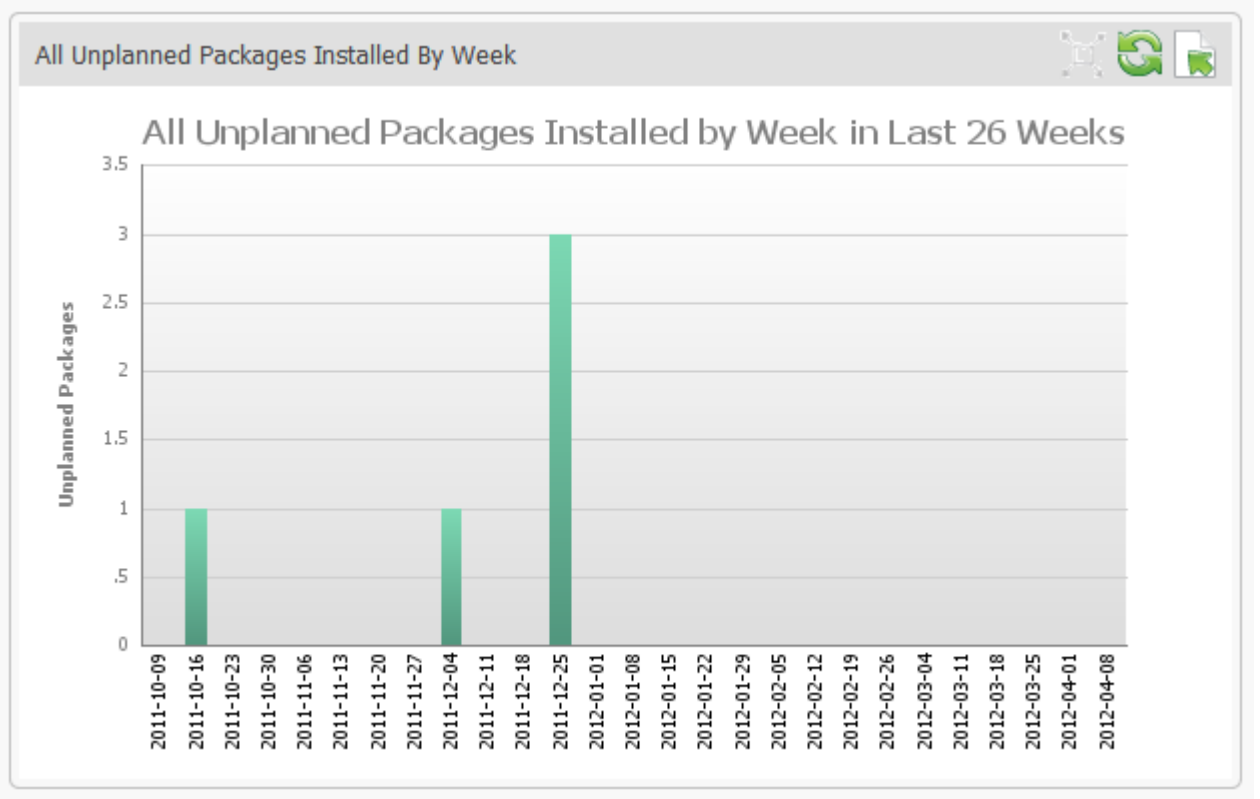
This metric displays all packages, broken down by type.



All Planned Packages by Week

This metric displays the total number of planned package installations on a week by week basis.



All Unplanned Packages by Week

This metric displays the total number of unplanned package installations on a week by week basis.