SERENA®
BUSINESS MANAGER

Work Center Transition Guide

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Chapter 1: Transitioning to Serena Work Center

Serena Work Center is a modern interface that replaces the "classic" SBM User Workspace. This document is intended for SBM User Workspace users who want to begin using Work Center.

Administrative setup steps to optimize Work Center for users are also discussed.

Note: If you have used Work Center in a previous release but have upgraded to SBM 10.1.5, refer to the readme for a list of new features and changes.

Overview

Serena Work Center offers a new approach for accessing with SBM primary items, which are also referred to as "work items."

Work Center provides most of the features you are used to, along with some new features that enhance your efficiency.

What Hasn't Changed

While the appearance of Work Center is quite different than the "classic" interface, it is powered by the same SBM process engine.

This means:

- There are no changes to your existing processes when you use Work Center. The same states and transitions are available to you, and automated processes (through orchestrations) operate as they do in the "classic" interface.

- State and transition forms may have a different appearance, but the same information and options are available. This includes custom forms and "quick" forms.

- Your current SBM reports can be run in Work Center. You can also create new reports and modify existing reports.

What Has Changed

In general, Work Center offers a different way to access work items. For example, Work Center offers three contexts for viewing work items:

- **Global Access**

  Use **Home** to find and create work items in any application you can access. Dashboards provide easy access to reports from any application. Activity views show current work items across the system by default.

- **Single Application Access**

Pin applications to your toolbar, and then use views and feeds to access information pertinent to each application. You can also limit the scope of the search and submit features to a single application.

- **Multi-application Access**

  Administrators can bundle applications into application groups. You can pin these application groups to your toolbar, and then use views and feeds to access information pertinent to applications in the group. You can also limit the scope of the search and submit features to the application group.

Use the following sections to learn more about Work Center.

Chapter 2: Work Center for Users

The following sections provide guidance to users who want to transition from the SBM User Workspace to Work Center.

Logging In to Work Center

Use this URL to log on to Work Center:

```
http://serverName/workcenter
```

Global Submit (+New)

The "global submit" feature enables you to add new work items to any project in any application you can access. You can also limit the scope of available projects to your preferred projects list or to the selected application or application group.

To submit new items, click the **+ New** button.

In the page that opens, you can:

- Use the **Recent** tab to see a list of the projects you most recently submitted items into. This list is initially empty but is populated as you submit items. You can also set recent projects as "favorites."

- Use the **Favorites** tab to see projects you have set as favorites.

- Use the **Browse** tab to search for projects or navigate the project tree.

Once you select a project, the submit form opens.

Work Item Search

Work Center's powerful search feature enables you to quickly find work items and reports.

See search in action.

You can search in these contexts:

- **Global**

  Looks for work items or reports in every application you can access.

- **Local**

  Looks for work items or reports in the selected application or application group.

Once you choose a search context, you can limit your query to:

- **All Items**

  Looks for work items in all projects you can access.

- **My Project Items**

  Looks for work items in the set of preferred projects defined in your user profile.

- **Reports**

  Looks for reports you can access in the selected context (global or local).

Search criteria must contain at least two characters. You can search for:

- Data in most field types

- Item IDs

- Notes and e-mail messages attached to items

- Information in most file attachments that contain text (PDF and Microsoft Word, for example). For large documents, only the first 1 million characters are searchable.

- Titles in linked items

The following information is not included in search evaluations:

- Values for *Date/Time*, *Numeric*, and *Summation* fields

- Change history records

A maximum of 300 work items are returned based on search criteria. The number of items shown on each page is based on the **Items Per Page** setting in your user profile, with a maximum of 40 items per page for search results.

Search results are ordered by the most relevant based on your search criteria, which is highlighted in the results. Relevance is based on the number of times your search criteria appears in each work items and is shown in for each item returned.

More information is included for each item returned by a search. Based on privileges, You may see the item ID, title, project, submitter, submit date/time, a short description, and the current state of each item.

Additional differences include:

- Use an asterisk (*) at the end of the search criteria as a wildcard character. For example, upgrad* returns results for upgrade, upgrades, upgrading, etc. Use a question mark (?) in the middle or at the end of a word to replace a single character. For example, pro?ect returns results for project and protect.

- Use quotation marks to search for phrases. For example, "SocketException connection refused" returns items with this exact phrase.

- Your search criteria can contain any combination of Item IDs, user names, and keywords. Use quotation marks, parentheses, and operators (AND, OR, NOT) to maximize your search.

Legacy search features remain in the "classic" end-user interface, also known as the SBM User Workspace. This includes application-specific keyword and ID searches, archived item searches, and the Advanced Lookup Tool.

Views and Feeds

Work Center presents information to you through views. Most views use feeds to aggregate data into a similar format.

For example, an activity view contains one ore more activity feeds, which typically show work items that you are currently responsible for. The work items may reside in different applications, or you may have different responsibilities for each work item. By combining multiple activity feeds into a single activity view, you can see all items requiring your action in one place.

Different types of views are available to you:

- **Dashboard**

  Shows reports, condensed activity views, and external Web pages in "widget" containers. You can add multiple widgets and arrange them to best suit your information needs.

- **Activity**

  Shows work items from one or more activity feeds, enabling you to easily navigate to information pertinent to your daily work.

- **Calendar**

  Shows calendar feeds, giving you a date-based view of information in a calendar format.

- **Backlog**

  Shows backlog feeds that provide a prioritized list of work items and progress reports that help you monitor completion rates.

You can have multiple views of each view type and for your Home page (global), each application, and each application group.

See activity views in action.

See backlog views in action:

- Creating Backlogs

- Using Backlogs

View Sharing

You can share views with other users, groups, or resource teams. You are the owner of views you create; you can share the view with others and designate them as co-owners, collaborators, or viewers. You cannot change the primary owner of a view, however.

You can add feeds and widgets to views that are shared with you, but these changes are only visible to you unless you modify the shared view. Only owners, co-owners, or collaborators can modify shared views.

Work Item Form Styling

Work item forms (submit, update, view, etc.) have been modernized. Except for a few minor changes, however, information and options are the same.

For example:

- The user profile card is available when you click a user's name on forms.

- Online help links for forms have been moved to the **Actions** drop-down list.

- The workflow graphic is now available from the **Get Help for this Application** help link available on the **Actions** drop-down list for each item.

- Spell check icons are no longer included on forms.

Notifications View

You can now view your notifications without leaving Work Center. Click the numbered icon on the toolbar. The number represents notifications that you have not read.

A list of notifications by subscription is shown. You can:

- Click a notification type, such as "Any work item is submitted," to open the list to those notifications.

- Click **View All** to open the full list.

The **Notifications** view lists notifications you have received based on your subscriptions. Notifications from all applications are listed and sorted by the date they were received.

You can filter the list by notifications that are read or unread, or by application, project, or subscription. Click the work item link for each notification to view and act on the item.

You can also determine how often the **Notifications** view should be refreshed. This option is located in your user profile.

> **Note:** You will continue to receive notifications by e-mail.

Reports

Reports are now organized in a Report Center that is available for each application and application group pinned to the Work Center toolbar.

See the Report Center in action.

Use one of these options to open the Report Center:

- Expand Reports in the navigation menu, and then click **Report Center**.

- Click the **Manage Views** icon (⬛) located in the navigation menu, and then click **Reports**.

The following report categories are available:

- **Recent Reports**

  See the most recently run reports. Results are limited to 200 reports.

- **My Reports**

  See reports you created.

- **All Reports**

  See all reports you can access for the selected application or application group. Reports are listed alphabetically.

- **System Reports (On-premise only)**

  See reports that provide information about administrative aspects, such as fields, user privileges, group membership, user activity, and more. Typically, System reports are only available to administrators. They cannot be deleted or customized, nor can new System reports be created.

- **Scheduled Reports**

  Lists reports that are scheduled to run at a particular time. Results are sent to your e-mail address.

Once you select a category, you can search for specific reports or filter the list by application, project, author, report type, and access type.

From the report results lists, you can run, edit, delete, and schedule reports, based on your privileges.

You can also add favorite reports to your navigation menu.

Creating Reports

To create a report, select a pinned application or application group, navigate to the Report Center, select a report category, and then click the **Create Report** button in the upper

right corner. If you are in the **Manage Views** page, you can click the blue plus sign on the **Reports** header.

The **Create Report** pages are now in a wizard, allowing for more intuitive report creation.

Running Reports

Report options have been moved to the **Actions** list on the report results page.
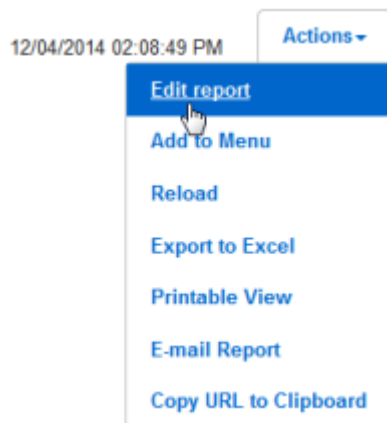
If you are running a report from a dashboard, you must open the report widget in a full window before these options are available.
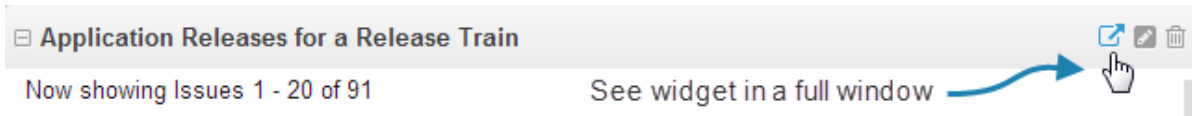
Calendar Feeds

Calendar feeds created in Serena Work Center cannot be added to Multi-Calendar reports. Similarly, Calendar reports cannot be used in Calendar views in Serena Work Center.

Scheduled Reports

Reports can be scheduled from the report list rather than in your user profile.

Favorites and Quick Links

Favorites and quick links are implemented in Work Center as navigation menu items. You can "pin" reports and views to menus for each application context for easy access.

See "Favorites" in Action

You can add and remove favorite views and reports for pinned applications groups. You can also add and remove favorite views for the Home context.

You can also drag and drop menu items to reorder views and reports in each category (dashboards, activities, calendars, reports, and backlogs). This task is performed from the Manage Views page for Home and each application context.

Mass Updates

Mass updates are available for the following features:

- Activity views
- Backlog views
- Listing reports

Auxiliary Item Searches

Use the **Manage Data** feature to search for, create, update, and delete auxiliary items.

To work with auxiliary items, click the user icon in the upper right corner, and then select **Manage Data**.
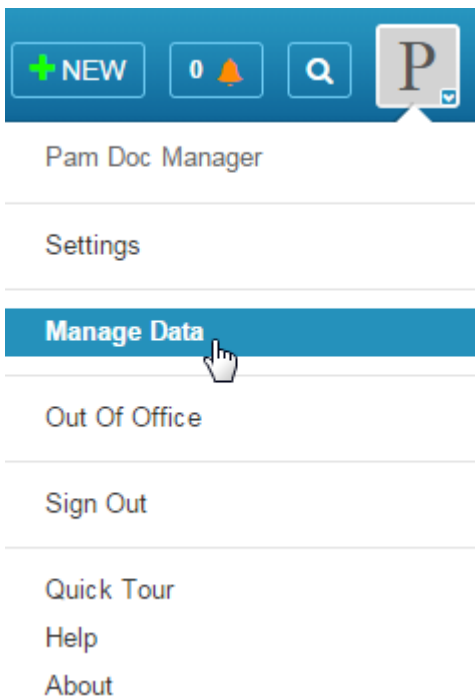
This option is only available if you have privileges to work with auxiliary items.

User Profile Options

Preferred Projects Differences

Manage your preferred projects on the **My Projects** view under **Settings**. Preferred projects are used for the following tasks:

- **Searches**

  Choose to search for items in your preferred projects rather than in all projects.

- **+New**

  Limit the project browse and search features to your preferred projects.

- **Feed Creation**

  When you create a feed, you can choose to only return work items from preferred projects of the user viewing a feed.

- **Report Creation**

  The projects that appear in the **Report Project** drop-down list when you create a report are filtered by your preferred project list.

Options Settings

User profile options are available in Work Center, but only options that apply directly to Work Center use are available.

In addition:

- **Feed Creation**

  You can create feeds from your user profile.

- **Out-of-office Delegation**

  You can access this option from the settings menu.

- **Items Per Page**

  This option applies only to report results and not search or view results lists.

Using the "Classic" Interface

The following features are not available in Work Center at this time. These features are still available in the User Workspace, however.

- Public and Knowledge Base Folders

- Built-in reports

- Editable Grid

- **Restore Saved Form Data** user profile option

- **Optional HTML Template** setting for all reports, except Listing reports

- Submit form templates for favorites

- Report auto requery

- Spell check icon on transition and update forms. This icon is only available in the User Workspace if HTML5 is disabled for your system.

Chapter 3: Work Center for Administrators

This section is intended to provide administrators with the guidance they need to ensure that users are successful with Work Center.

For details on each of the topics discussed in the following sections, refer to the "Configuring Serena Work Center" chapter of the *SBM Application Administrator Guide*.

- Application Groups and the Application Toolbar [page 15]

- System Views [page 15]

- Shared Views and Menu Customization [page 16]

- Notifications [page 16]

- Backlog Preparation [page 16]

- Interface Customization [page 17]

- Search [page 17]

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- Miscellaneous Tasks [page 18]

Application Groups and the Application Toolbar

Multiple applications can be bundled into a single group. Users can pin these application groups to the Work Center toolbar, and then create views specific to that group.

Application groups are managed in SBM Application Administrator. Application groups are provided for some Serena solutions, such as Release Manager. You can also create your own application groups.

Administrators can control what appears on the application toolbar:

- You can pin applications and application groups for users.

- You can choose to lock specific applications so users cannot remove them from their toolbar.

- You can remove the Home icon.

These tasks are performed in SBM Application Administrator at a global level or for one or more users or groups.

System Views

Work Center provides three system views for Home and for each application and application group. Administrators can customize these views for all users in the system.

The system views have the following default behavior:

- **My Dashboard**

  Shows tips for using the dashboard. You can replace these tips with widgets that contain reports, condensed activity views, or external Web pages.

- **My Activity**

  Shows a system "All Items I Own" feed. You can remove this report and replace it with other feeds or add public feeds.

- **My Calendar**

  Has no default feeds. You can add public calendar feeds or leave this task to users, who can create and add their own calendar feeds.

Shared Views and Menu Customization

Remote administrators can customize navigation menus for users, groups, and resource teams by creating shared views and adding those views to menus. This applies to dashboards and activity, backlog, and calendar views.

Notifications

To prepare notifications for Work Center, perform the following tasks:

- **E-mail Notification Links**

  You can change the link type for e-mail notifications to Serena Work Center so that users are sent to Work Center when they click an item link in an e-mail notification. This task must be completed for each e-mail notification.

- **Deleting Notifications**

  You can configure the number of days for which notifications should appear in Serena Work Center in the Notification Server sub-tab in SBM Configurator. The default value is 30 days. Notifications that are older than this value are purged from Work Center.

Backlog Preparation

Backlog views enable users to organize and prioritize work items based on backlog feed content. Backlog views and feeds are only available in Serena Work Center.

Backlogs are available to user without additional setup, but you can enhance this feature by:

- Adding *Single Selection* fields with weights or *Numeric* fields to applications that use backlogs. These fields can be used to capture planning estimates and actual effort spent for each work item.

- Adding resource teams so that users can share backlog views with specific teams and include these teams in backlog feed criteria.

- Creating notifications for backlog changes. You can create rules that fire notifications when items are added to or removed from backlogs or when the priority changes for an item in a backlog.

Interface Customization

Use the following features to tailor Work Center:

- **Easy Interface Branding**

  Administrators can quickly customize the logo, browser header, and footer that is shown to users. These changes are made in Work Center by any user who has been granted the "Remote Administration" privilege. Changes are visible to all Work Center users.

- **String Customization**

  Use the Localization feature to translate or modify Work Center text. Default strings are provided for the English (United States), or en-US, locale.

  You can:

  - Override the default labels, messages, and other strings.

  - Translate provided strings to another language.

- **End-user Help Text**

  You can add descriptive text to projects in SBM Application Administrator to help users understand the purpose of each project. For example, this information appears as hover text to Work Center users who hover over project search results when they search for projects to add work items to.

Search

On-premise customers can control certain system aspects of the Work Center global search feature, such as configuring polling interval that determines how often to poll the database to learn about new search strings. The default is 3 minutes. These settings are modified in SBM Configurator. For details on system search settings, refer to the "Configuring Smart Search" section of the *SBM Installation and Configuration Guide*.

Promotion

The following Work Center entities are promoted across environments:

- Application groups

- Shared views (activity, backlog, calendar, and dashboard) and public feeds added to those shared views are promoted with the applications they reference

- Public feeds associated with system views are also promoted with the applications they reference

The following Work Center entities are not promoted at this time:

- Private views and feeds

- Menu customizations made by users and administrators

- Shared views for the global context

This feature is available for on-premise customers only.

Miscellaneous Tasks

To optimize Work Center, perform these additional tasks:

- To ensure users can access the Rich Text Editor, verify that the **Enable Rich Text** option is selected for *Text* fields in SBM Composer.

- Users can share views with other users, groups, or resource teams. To optimize this experience, you can create resource teams to group users by functional team, business unit, department, or scrum team. For details on resource teams, refer to the *SBM Application Administrator Guide* located on the Documentation Center.

- To ensure users have contact data available to them, perform a user import from LDAP or a spreadsheet and map data to resource attributes.

- To use the Application Usage report, on-premise customers should verify that the **Active Diagnostic Service** is running. This task is performed in SBM Configurator.