



SERENA

REQUIREMENTS MANAGER 4.0

Getting Started Guide

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Welcome to Serena Requirements Manager



Thank you for choosing Serena Requirements Manager, the orchestrated solution for application requirements management that brings requirements initiation, review, and approval to your end-to-end design, development, and quality process.

Serena Requirements Manager is an orchestration of Serena Dimensions RM and Serena Business Manager. As part of Serena ALM, Requirements Manager fits into an orchestrated workflow with Serena Development Manager. Optionally, it can leverage the rich reporting capabilities of Serena Dashboard. It also includes Serena Prototype Composer as a stand-alone prototyping tool.

Serena Resources

Serena provides a variety of resources to improve your product experience. See the following topics for information about how to access them:

- Verifying Platform Support [page 4]
- Obtaining Documentation [page 4]
- Product Training and Education [page 5]
- Accessing the Serena Support Community Forum [page 5]
- Contacting Technical Support [page 5]

Verifying Platform Support

For details of supported server and client platforms, third party integrations, and Serena Integrations, see the Serena Release Plan for Serena Requirements Manager at:

<http://support.serena.com/roadmap/index.aspx>

Select the relevant product and then the desired version.

TIP You can click and drag to move the timeline so that the desired version is visible.

Obtaining Documentation

 For your convenience, most Requirements Manager documentation is available in both HTML Help and PDF formats. The following documentation is available:

| Document | Description |
|---|---|
| <i>Serena Requirements Manager Help</i> | An HTML help system with information on installing, configuring, and getting started with Requirements Manager. |
| <i>Serena Requirements Manager Installation and Configuration Guide</i> | A PDF version of the installation and configuration information from the help. |
| <i>Serena Requirements Manager Getting Started Guide</i> | A PDF version of the getting started information from the help. |
| <i>Serena Requirements Manager Web Services Help</i> | An HTML help system that describes the usage of the Requirements Manager web services. |
| <i>Serena Requirements Manager Web Services Reference Manual</i> | A PDF version of the Requirements Manager web services help. |

| Document | Description |
|---------------|---|
| <i>Readme</i> | An HTML readme file with information on known issues and content too late for inclusion in the other documents. |

To access the documentation, do any of the following:

- To launch the help, click the **Help** button in Serena ALM.

NOTE The help is hosted on a Serena server and requires internet access.

- To download or view the PDF manuals and HTML readme, click the **Demos & All Docs** button on the toolbar of the help and then click **Documentation**. The resulting page includes links to all documentation for Serena ALM, including the individual Serena products that underlie the orchestrations as well as past versions of the documentation.

TIP To jump straight to the documentation page for Requirements Manager 4.0, click or enter the following:

http://help.serena.com/alm/info_center/doc_index/rqm/4.0/index.html

Product Training and Education



Are you ready to get the most from Serena products? Our Training organization is ready to help you get there. We are a world-class, highly skilled team of technical instructors and course developers that create and deliver training to business, application developers, and system administrators. We offer a variety of courses that are delivered at our regional training location, on site at your location or virtually, from the most basic to the most challenging, depending on your needs.

No matter your experience level, you will get a hands-on workshop experience in which you will learn new concepts to help you succeed—with breathtaking speed. Whether you are a novice user or a self-sufficient expert, you can accomplish your goals quickly, easily, and confidently after taking courses from Serena Education. We offer a blended learning approach, so whether your preference is instructor-led, virtual, or e-learning, we have the course for you.

For more information, contact the Serena Product Training and Education Department.

Serena Product Training and Education Department:

<http://www.serena.com/services/education/>

Accessing the Serena Support Community Forum



Serena provides a forum where users can discuss questions and best practices with other Serena users and Serena employees. Harvest the power of the internet and see if others have already addressed your question. Create an account and get involved!

The Serena Support Community Forum:

<http://communities.serena.com/>

Contacting Technical Support

Serena provides technical support for all registered users of this product, including limited installation support for the first 30 days. If you need support after that time, contact Serena Support for more information.

Serena Support:

<http://support.serena.com/>

NOTE Language-specific technical support is available during local business hours. For all other hours, technical support is provided in English.

What Is Requirements Manager?

The Serena Requirements Manager suite is composed of Serena Dimensions RM, Serena Requirements Control, and Serena Prototype Composer. As part of Serena ALM, Requirements Manager integrates with other Serena suites like Development and Release Manager.

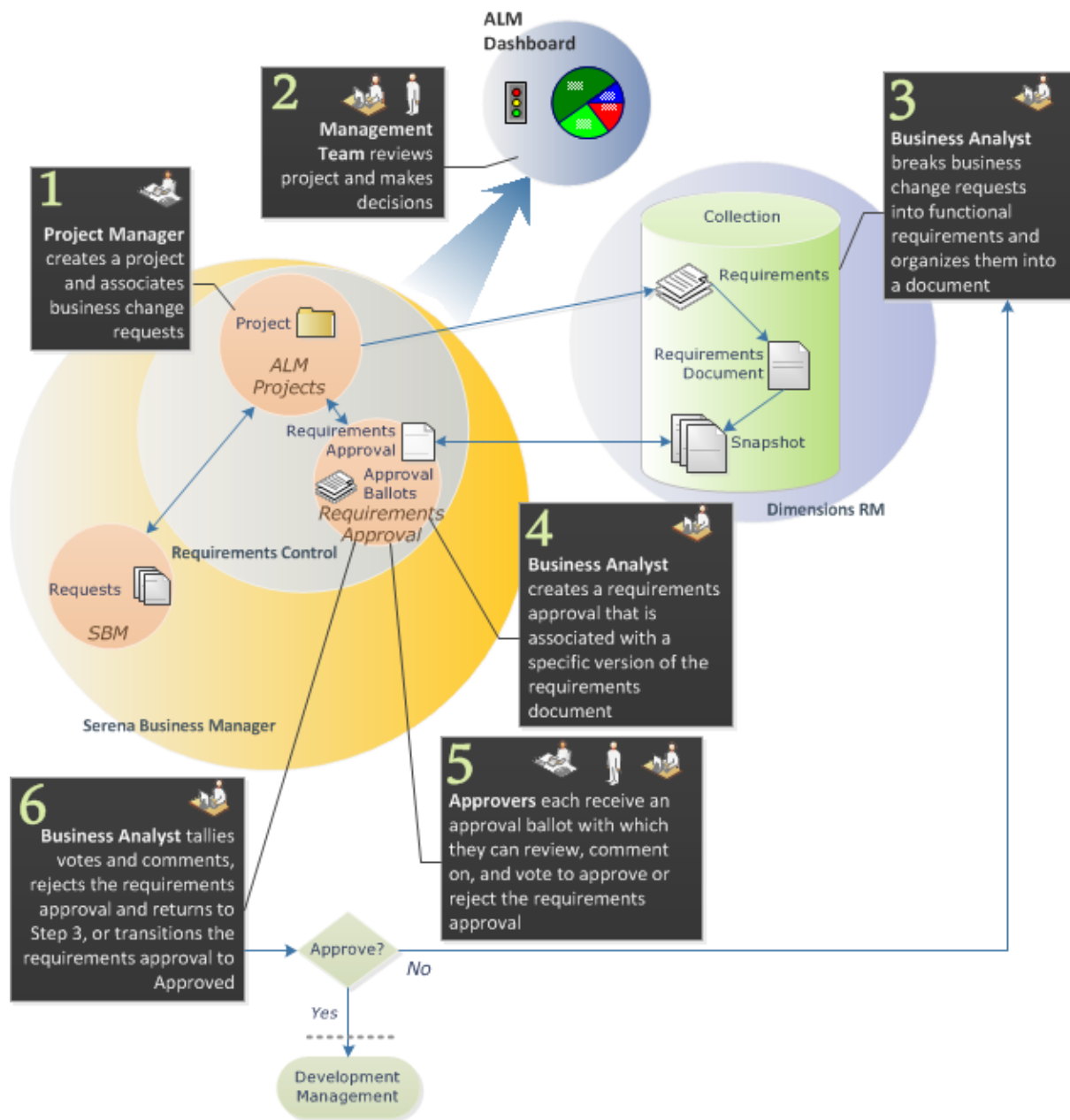
Serena Requirements Manager consists of the following components:

- **Requirements Control (powered by SBM):** A set of process applications implemented on Serena Business Manager to provide high-level project management and requirements review/approval capabilities:
 -  **ALM Projects:** A process application to track projects through the various workflow states of planning, development, testing, and release.
 - › Used by project managers.
 -  **Requirements Approval:** A process application to propose, review, comment on, edit, and approve/reject collections of requirements in Dimensions RM.
 - › Used by business analysts and requirement approvers.
 - **RM to RQM Connector:** A process application to facilitate interactions between Dimensions RM and SBM.
 - › Used behind the scenes by Requirements Manager itself.
- **Serena Dimensions RM:** An enterprise-wide requirements solution that allows the creation, editing, organization, and reporting on of requirement data.
 - › Used by business analysts.
- **Serena Prototype Composer:** A powerful application planning, modeling and prototyping environment that non-technical business users can use to visually define their application needs, including business processes, activities, user interfaces, requirements, and data. It makes it easy to plan, model and rationalize business applications before beginning their development.
 - › Used by business analysts.
- **Serena Dashboard (optional):** A powerful, highly configurable reporting solution built on the IBI WebFocus platform. With Serena Dashboard, you can build dashboards of graphs that provide precisely the information you, your managers, and your executives need, when they need it.
 - › Used across the enterprise.

Usage Overview

The components included in Serena Requirements Manager work together as outlined in the following diagram.

NOTE This represents the standard, non-customized out-of-box configuration. Your implementation may be customized and differ significantly from that depicted here, but the general principals are the same.



The following table elaborates on the steps in the diagram above and includes references to more detailed information.

| Step | Description |
|------|---|
| 1 | <p>At the beginning of a project, a project manager uses the ALM Projects process application in Requirements Control (running on Serena Business Manager) to create a new project. This is typically in response to incoming demand, such as a request for a new feature or a defect fix. In the example diagram, these requests originate from Serena Business Manager (SBM). This project is associated with a new (empty) or existing collection in Dimensions RM.</p> <p>For details on the Development Project workflow, see ALM Projects Workflow. For details on creating projects, see Creating and Managing Projects.</p> |

| Step | Description |
|------|---|
| 2 | <p>At any point during a project’s lifecycle, leads, managers, executives, and others may consult Serena ALM Dashboard to review project status and key performance indicators (KPIs). The reports displayed here may help decision makers choose the correct path forward when work must be prioritized or re-evaluated.</p> <p>For more on viewing and customizing ALM Dashboard views, see Displaying Project Metrics with the ALM Dashboard.</p> |
| 3 | <p>The Business Analyst analyzes the requests associated with the project, breaks them down into individual requirements in Dimensions RM, and organizes them into a requirements document. These requirements all belong to the collection associated with the project in Step 1.</p> |
| 4 | <p>In the Requirements Approval process application, the Business Analyst creates a requirements approval for the Dimensions RM requirements document. This associates the requirements approval with a specific version (snapshot) of the requirements document. The Business Analyst then selects approvers and sends them approval ballots from the requirements approval.</p> |
| 5 | <p>Using the Requirements Approval process application, approvers open their approval ballot, view the requirements document, and add comments or raise change requests against the requirements as needed. They then individually vote to accept, accept with comments, or reject the requirements approval.</p> |
| 6 | <p>After the reviewers have completed their review or the specified review period has elapsed, the Business Analyst tallies the votes and comments received via the approval ballots.</p> <p>If changes must be made to the requirements, the Business Analyst disapproves the requirements approval, revises the requirements, and issues a new requirements approval associated with a new version of the requirements document; So the process returns to Step 3 and proceeds again.</p> <p>Once the requirements approval is accepted by the approvers, the Business Analyst approves the requirements approval and the approved requirements proceed to the Development Management process (in the case of Serena Development Manager, it would share the same ALM project and have access to all the requests and requirements created up to this point).</p> |

ALM Project Workflow

The ALM Projects process app provides a high level view of the overall project workflow and status. The out-of-box workflow is as follows:

ALM Projects Workflow



The states include the following:

1. **Inception:** During this state, the Project Manager creates the project.
2. **Elaboration:** During this state, the Business Analyst defines change requests for the project based on the Dimensions RM requirements approved as part of the Requirements Approval workflow.
3. **Construction:** At this point, the Development Manager or Lead prioritizes the change requests and creates tasks related to the requests. The tasks are assigned to developers to implement. Developers work on the tasks, storing new versions of files in their configuration management

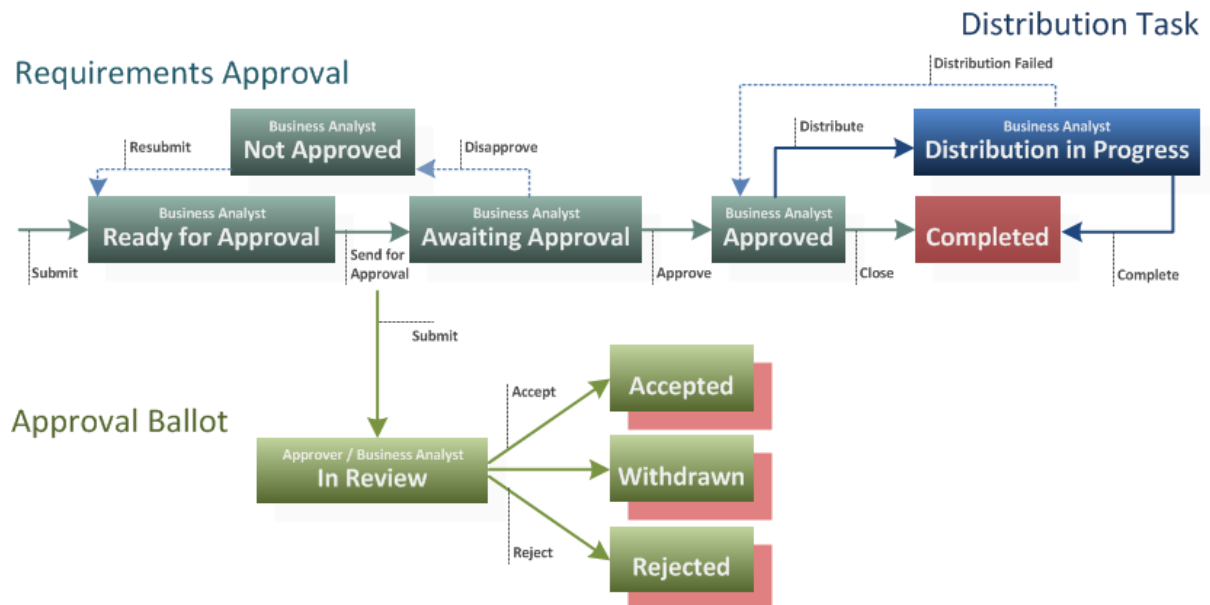
system (such as Dimensions CM). Regular builds are compiled and installed for testing, and requests are assigned to QA to test. Once all of the requests have been implemented, the Development Manager can transition the project to the next state.

4. **Transition:** During this state, QA perform robust testing of the completed product or features, recording defects as they find them. QA may use a test management system such as HP Quality Center to track test case execution. QA submits defects to the Change Request process app, and the defects are assigned to developers to fix. QA validates fixes and closes defects as they are resolved. When all critical defects are complete, QA can transition the project into the Complete state.
5. **Complete:** During this state, the finished product is prepared for release. The final builds are collected and packaged for deployment, perhaps using Serena Release Manager. When the product is ready to deploy or release, the project can move to the final state.

Requirement Approval Management Workflow

The Requirement Approval Management process app facilitates and tracks the review and approval of a Dimensions RM requirements document. The out-of-box workflow is illustrated in the following diagram and includes up to three types of items:

- **Requirements Approval (RA):** Tracks the review and approval of a specific version of a Dimensions RM requirements document.
- **Approval Ballot (BLT):** Records the comments and vote of each Approver. One is sent to each Approver associated with a given Requirements Approval.
- **Distribution Task (DTSK):** If both Requirements Manager and Development Manager are implemented, a Distribution Task can be initiated to feed the approved requirements into the Development Manager workflow where development change requests will be created from them.



The states for the items include the following:

1. **RA - Ready for Approval:** The Business Analyst adds Approvers to the Requirements Approval and sends it for approval.
2. **RA - Awaiting Approval:** After reviewing the Approval Ballots, the Business Analyst either Approves or Disapproves (**Not Approved**) the Requirements Approval.
 - a. **BLT - In Review:** Each Approver receives an Approval Ballot and reviews the Requirements Document associated with the Requirements Approval. Each Approver casts a vote to Accept (**Accepted** or **Accepted w/ Comments**) or Reject (**Rejected**) the Requirements Approval. If an Approver does not act before the Business Analyst Approves

or Disapproves the Requirements Approval, then his Approval Ballot is transitioned to the **Withdrawn** state.

- b. **BLT - Accepted / Rejected:** The Business Analyst reviews the Approval Ballots of the Approvers.
3. **RA - Approved:** If Development Manager is implemented along with Requirements Manager, the Business Analysts initiates a Distribution Task; Else the Requirements Approval is Closed (**Completed**).
4. **DTSK - Distribution in Progress:** The approved requirements are handed off to the Development Manager workflow via a Distribution Task where development change requests will be created from them.
5. **RA/DTSK - Completed**

Supporting Your Development Process

Serena Requirements Manager is a powerful, highly customizable lifecycle management and reporting application. To make the best use of it, spend some time evaluating your own development processes. It is important to decide what processes and issues Serena Requirements Manager can help you solve, to set expectations appropriately and begin to plan roll-out and adoption. Consider creating a diagram of your development lifecycle if you do not already have one, as this can be a valuable resource when mapping your workflows in Serena Business Manager.

Using Requirements Manager

After installing the Requirements Manager components, you can log in right away to the out-of-the-box configurations in Requirements Control and Serena Dashboard. You can then start learning your way around the default process apps. A process app is an application running in Serena Business Manager with a web-based user interface and workflow logic that coordinates the features and integrations across all included platforms. Process apps can be customized as needed to meet the needs of your organization; However, right out-of-the-box, you can step through the default process apps to see a mature example of a Requirements Manager implementation.

To get started using Requirements Manager, see the following topics:

- Logging In to Requirements Control [page 11]
- Interface Basics [page 11]
- Creating a Project [page 12]
- Working with Projects [page 13]
- Creating Requirements Approvals [page 15]
- Working with Requirements Approvals [page 16]
- Working with Approval Ballots [page 18]
- Working with Dimensions RM Requirements Documents [page 21]
- Displaying Project Metrics with Serena Dashboard [page 24]

Logging In to Requirements Control

Requirements Control is roles based: what you can see and do is determined by the role assigned to the user that you log in as. Log in with a user name that has been configured with the desired role, for example:

- **Approvers:** Can be assigned Approval Ballots with which they can comment or vote whether to accept or reject the associated Requirements Approval.
- **Business Analyst:** Can create Requirements Approvals, assign Approval Ballots, and comment on and Approve or Disapprove Requirements Approvals.
- **Project Manager:** Can create projects in ALM Projects and associate them with business change requests.
- **Viewers:** Can view Requirements Approvals, Approval Ballots, and Distribution tickets, but cannot participate in the comment and approval process.

To log in to Requirements Control:

1. In a supported browser, open the following URL:


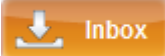






```
http://sbmServer:sbmPort/tmtrack/tmtrack.dll?shell=alm
```

Where *sbmServer* and *sbmPort* are those of your Serena Business Manager server.

2. At the Login page, enter your login credentials.

Interface Basics

The items and options displayed are determined by the role of the user you are logged in as and the display selections you make in the interface.

-  Click the **Actions** button to select from a menu of actions permitted for the current user's role, such as creating a **New Requirements Approval** or **New Project**.
- To control what items are displayed:
 -  Click the **Inbox** button to list all of the items assigned to you by others.
 -  Click the **Requirements Approval** button to list all of the requirements approvals assigned to you regardless of who assigned them.
 -  Click the **Projects** button to list all of the projects assigned to you regardless of who assigned them.
 - **View:** Select a filter, such as: **All, Mine, In Review, Closed**, etc., to filter the list of displayed items.
 - **Project:** Select a project to filter out all items not in the selected project.
- To control how items are displayed:
 -  Click to refresh the currently displayed items.
 -  Click to move the details view from below the list view to beside the list view, and back.
 -  Click to view the currently open item in its own browser tab.
 -  To toggle between collapsing or displaying the list view, click the central dark gray (orange when hovered over) area of the divider between the list view and the details view. To resize the views, drag the light gray (green when hovered over) area of the divider to the desired position.

Creating Projects

Before you can create Requirements Approvals and initiate the requirements approval process, there must be an ALM Project for the Requirements Approvals to belong to.

NOTE The roles and fields referenced in this procedure are based upon the default out-of-box configuration. The specifics of your implementation may differ.

To create a new project:

1. Log in as a user with the Project Manager role.
2. Click **Actions** and select **New Project** from the resulting menu. The Create New Project dialog appears.
3. Complete the fields as needed; Required fields are marked with an asterisk (*) and the name is shown in red.

The following list describes some of the fields included in the default configuration:

- **Roles:** Specify the owners of the key roles for the project. The Business Analyst role is central to the default Requirements Approval workflow.
- **Dates:** Target start and end dates for each phase/state of the project, including Inception, Elaboration, Construction, and Transition. The actual start and end dates will be recoded as the transitions from state to state occur.

- **Configuration Management Settings:** If both Requirements Manager and Development Manager are implemented, you can specify the Dimensions CM products and projects/streams to associate with the ALM Project. Enter the information or click the **Get CM Products** and **Get Projects or Streams** buttons to populate the selection lists.

NOTE In the default implementation, you may need to log in as the Development Manager after the ALM Project has been created in order to make this association.

- **Requirement Management Settings:** Specify the Dimensions RM collection to associate with the ALM Project. Enter the information or click the **Get RM Collections** button to populate the selection list.

4. Click **OK**.

Working with Projects

A project is the common thread that ties your information and resources together and provides a high-level workflow from start to end. From the project, you can access all of the associated SBM, Requirements Manager, and Development Manager artifacts, as well as the Dimensions RM, Dimensions CM, and TestDirector resources to which they refer.

NOTE The details referenced in this procedure are based upon the default out-of-box configuration. The specifics of your implementation may differ.

To view or modify a project:

1. Click the **Projects** button to display a list of available projects.
2. Select a project in the list to open it for work.

| Title | Item Id | Description | State | Project Status | Project Manager |
|-----------------------------------|-----------|--|-----------|----------------|------------------------------|
| CAD Endeavor 2012 | 000249 | Updates, fixes, and new features for 2012. | Inception | (None) | Mira Project/Program Manager |
| New Demo Project | IN0000247 | Sample demo project | Inception | Green | Mira Project/Program Manager |
| No RQM Project | IN0000242 | Project with no connection to RM/RQM | Inception | Green | Mira Project/Program Manager |

Project: **CAD Endeavor 2012** [Edit](#) **State:** Inception [Begin Elaboration](#)

Description: Updates, fixes, and new features for 2012.

Project Manager: Mira Project/Program Manager

Project Status: (None)

Item Id: 000249

[Change Requests](#) [Packages](#) [Approvals](#) [Tasks](#) [Requirements](#) [Schedule](#) [History Log](#) [Dimensions RM](#)

RM Collection Name: Ephoto Hot List

RM Collection ID: 2

3. To edit the properties that were set when the project was created, click the **Edit** link next to the project name. An Update dialog appears with fields similar to those of the Create New Project dialog.
4. To advance the project to the next state in the workflow, click the button with the next transition's name on it just below the display of the current state. In the image above, the current state is **Inception** and the next available transition is **Begin Elaboration**.
5. View or modify the content of the project's tabs as needed:
 - **Change Requests:** You can view a list of the change requests associated with the project, as well as open them for viewing and editing.
 - **Packages:** You can view a list of development packages associated with the project, as well as open them for viewing and editing.

NOTE This is available only if Development Manager is implemented.

- **Approvals:** You can view a list of the Requirements Approvals associated with the project, as well as open them for viewing and editing.
- **Tasks:** You can view a list of the tasks associated with the project, as well as open them for viewing and editing.

NOTE This is available only if Development Manager is implemented.

- **Requirements:** You can view a list of the Dimensions RM requirements associated with the project and the Distribution Tasks associated with the requirements, as well as open them

for viewing and editing where you can edit attributes, add a comment, or submit a change request against the requirement.

- **Schedule:** You can view the target dates and actual dates for each phase/state of the project.
- **History Log:** You can view the change history of the transitions from state to state (when the transitions occurred and who initiated them), as well as an activity log listing all changes to the project and who made them.
- **CM:** You can view the details of the Dimensions CM product and project/stream associated with the project.

NOTE This is available only if Development Manager is implemented.

- **Dimensions RM:** You can view the details of the Dimensions RM collection associated with the project.

Creating Requirements Approvals

Requirements Approvals are Requirements Manager items that facilitate and track the review and approval of a specific version (snapshot) of a Dimensions RM requirements document. A new Requirements Approval is created for each successive version of the Dimensions RM requirements document that is submitted for approval.

NOTE The roles and fields referenced in this procedure are based upon the default out-of-box configuration. The specifics of your implementation may differ.

To create a Requirements Approval:

1. Log in as a user with the Business Analyst role.
2. Click Actions and select New Requirements Approval from the resulting menu. The Create New Requirements Approval dialog appears.
3. Complete the fields as needed; Required fields are marked with an asterisk (*) and the name is shown in red.

The following list describes some of the fields included in the default configuration:

- **Search for and select an ALM Project:** Specify the project that the requirements approval will belong to.
- **Select a Requirements Document to associate with this Requirements Approval:** Select the desired requirements document from the list. Once you have made a selection here, the next field is populated with the available versions (snapshots) of the requirements document.
- **If the Requirements Approval is for an existing version of the Requirements Document, select it here:** Select the desired version of the requirements document.
- **To create a new version of the Requirements Document, change the version name here:** Specify a unique name for the new version.
- **Business Analyst:** Specify the user who will fill the Business Analyst role for this Requirements Approval.

NOTE This may have been set at the project level.

4. Click **OK**.

Working with Requirements Approvals

Depending on your user role, you can view and edit a requirements approval and its associated Dimensions RM requirements document, and send out Approval Ballots to solicit feedback and votes.

NOTE The details referenced in this procedure are based upon the default out-of-box configuration. The specifics of your implementation may differ.

To view or modify a requirements approval:

1. Click the **Requirements Approvals** button to display a list of available requirements approvals.
2. Select a requirements approval in the list to open it for work.

The screenshot shows the Serena Requirements Control web application interface. The browser title is "Serena Software, Inc. (http://www.serena.com) - Mozilla Firefox". The URL is "http://orl-rqm-sbm1/tmtrack/tmtrack.dll?shell=alm". The page header includes "SERENA REQUIREMENTS CONTROL" and "Welcome, Matt Business Analyst (IT)". The main navigation bar has buttons for "Inbox", "Requirements Approvals", and "Projects". Below the navigation bar, there are filters for "View: All" and "Project: All Projects". A table lists requirements approvals, with one entry selected: "ePhoto Requirements Review 1".

| Name | Requestor | Business Analyst | Item Id | ALM Project | State |
|------------------------------|----------------------------|----------------------------|----------|-----------------------------------|-----------------|
| ePhoto Requirements Review 1 | Matt Business Analyst (IT) | Matt Business Analyst (IT) | RA000005 | 000197: RQM Release 1 (Inception) | Not Approved |
| | Matt Business Analyst | Matt Business Analyst | | 000197: RQM Release 1 | Distribution in |

The selected approval details are shown below:

Requirements Approval: Round-1 for CAD Endeavor 2012 [Edit](#)

State: Awaiting Approval

Buttons: Approve, Disapprove, Comment, Add Approvers

First draft of requirements for review.

Business Analyst: Matt Business Analyst (IT)

ALM Project: 000249: CAD Endeavor 2012 (Elaboration)

Requirements Document Version: ePhoto Marketing Reqs V1

Target Due Date: 06/01/2012

Approval Ballots, Comments, History Log, Properties

| Name | Item Id | Approver | State | Comments |
|-------------------------------|-----------|----------------------------|----------------------|--|
| Round-1 for CAD Endeavor 2012 | BLT000040 | Josh Dev Manager | Accepted w/ Comments | 05/02/2012 06:02:32 PM - Josh Dev Manager: Looks good, but I think we could safely increase the minimum supported resolution to 1080p. |
| Round-1 for CAD Endeavor 2012 | BLT000041 | Matt Business Analyst (IT) | In Review | |
| Round-1 for CAD Endeavor 2012 | BLT000042 | Kari Product Owner | In Review | |

3. Do any of the following:
 - To edit the properties that were set when the requirements approval was created, click the **Edit** link next to the approval's name. An Update dialog appears with fields similar to those of the Create New Requirements Approval dialog.

- **Requirements Document Version:** Click the name/link of the requirements document to open it and view the requirements. See Working with Dimensions RM Requirements Documents [page 21].
- **ALM Project:** Click the name/link of the project to open it and view all information associated with the project. See Working with Projects [page 13].
- **Send for Approval:** Click the button to specify users and send Approval Ballots to them so that they may review, comment, and vote on this Requirements Approval and its associated Dimensions RM requirements document.

The Send for Approval dialog appears. Complete the following fields:

- a. **Target Due Date:** Optionally, you can enter a date by which the approvers should respond.
- b. **Approvers:** Specify the desired users.
- c. Click **OK**.

NOTE You can send Approval Ballots to additional users by clicking the **Add Approvers** button and completing a dialog similar to the one described above.

- To advance the requirements approval to the next state in the workflow, click the button with the desired transition's name on it just below the display of the current state. In the image above, the current state is **Awaiting Approval** and the next available transitions are **Approve** and **Disapprove**.

TIP See the Requirements Approval Management Workflow [page 9] for more information on the transitions and states available in the default implementation.

4. View or modify the content of the requirements approval's tabs as needed:

- **Approval Ballots:** You can view a list of the approval ballots associated with the requirements approval, as well as open them for viewing. If a ballot is still in the In Review state and you possess the required role, you can transition the approval ballot to another state.
- **Distribution Tasks:** You can view a list of the distribution tasks associated with the requirements approval, as well as open them for viewing.

NOTE This is available only if Development Manager is implemented.

- **Comments:** You can view all of the comments that have been submitted via approval ballots or directly into the requirements approval itself.
- **History Log:** You can view the change history of the transitions from state to state (when the transitions occurred and who initiated them), as well as an activity log listing all changes to the requirements approval and who made them.
- **Properties:** You can view various properties of the requirements approval, including: who the approvers are, who holds the key user roles, the name of the associated Dimensions RM requirements document, etc.

Working with Approval Ballots

A Business Analyst sends Approval Ballots out to Approvers who then return their comments and votes for the Business Analyst to review and tally. See the following sections for a role-based look at working with Approval Ballots.

NOTE The details referenced in this procedure are based upon the default out-of-box configuration. The specifics of your implementation may differ.

Voting an Approval Ballot as an Approver

As an Approver, you will see Approval Ballots (BLT) appear in your Inbox as they are assigned to you. You can then review the Requirements Approval and its associated Dimensions RM requirements document and respond via the Approval Ballot with your comments and vote.

To vote an Approval Ballot:

1. Click the **Inbox** button to see if you have any pending approval ballots.
2. Click an approval ballot to open it for work.

The screenshot shows the Serena Requirements Control interface in a Mozilla Firefox browser. The page title is 'SERENA REQUIREMENTS CONTROL' and the user is logged in as 'Mira Project/Program Manager'. The main navigation bar includes 'Inbox', 'Requirements Approvals', and 'Projects'. A table lists requirements, with the selected one being 'Round-1 for CAD Endeavor 2012' (Item ID: BLT000043) in 'In Review' state. Below the table, the 'Approval Ballot' details are shown, including the state 'In Review', an 'Edit' button, and action buttons 'Accept', 'Accept w/ Comments', and 'Reject'. The ballot description is 'First draft of requirements for review.' and includes fields for Business Analyst (Matt Business Analyst (IT)), Approver (Mira Project/Program Manager), ALM Project (000249: CAD Endeavor 2012 (Elaboration)), Target Due Date (06/01/2012), Requirements Approval (RA000039: Round-1 for CAD Endeavor 2012 (Awaiting Approval)), and Requirements Document Version (ePhoto Marketing Reqs V1). At the bottom, there are tabs for 'Comments', 'History Log', and 'Properties', and a summary section showing the Owner (Mira Project/Program Manager), Project (Approval Ballot Project), Submit Date (05/02/2012 05:37:37 PM), and Close Date.

3. Do any of the following:

- **Requirements Approval:** Click the name/link of the associated requirements approval to open it and view the comments and votes of other approvers as well as general information about the requirements approval. From the Requirements Approval, you can click the **Comment** button to leave a comment without yet voting. See Working with Requirements Approvals [page 16].
- **Requirements Document Version:** Click the name/link of the requirements document to open it and view the requirements. See Working with Dimensions RM Requirements Documents [page 21].
- **ALM Project:** Click the name/link of the project to open it and view all information associated with the project. See Working with Projects [page 13].

4. Cast your vote:

- **Accept:** Your approval ballot is transitioned to the **Accepted** state.
- **Accept w/ Comments:** Enter your comment in the resulting dialog and click **OK**. Your approval ballot is transitioned to the **Accepted w/ Comments** state.

- **Reject:** Enter your reason for rejection in the resulting dialog and click **OK**. Your approval ballot is transitioned to the **Rejected** state.

NOTE If you do not act by the time the Business Analyst transitions the requirements approval to Approved or Disapproved, your approval ballot will be withdrawn.

Tallying Approval Ballots as a Business Analyst

As a Business Analyst, you will send Approval Ballots to the Approvers associated with a Requirements Approval (see Working with Requirements Approvals [page 16]) and then analyze the resulting votes and comments returned via the Approval Ballots. You will then Approve or Disapprove the associated Requirements Approval.

To tally Approval Ballots:

1. Click the **Requirements Approvals** button to display a list of available requirements approvals.
2. Select a requirements approval in the list to open it for work.

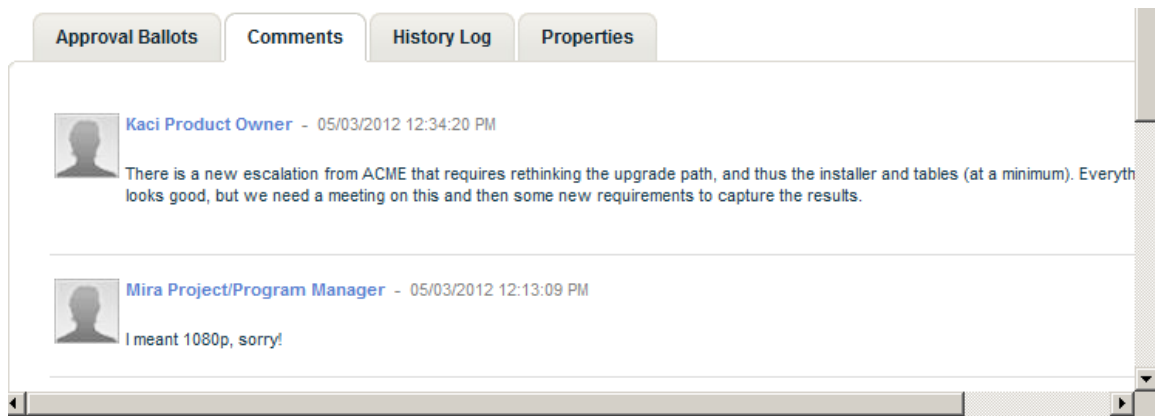
The screenshot shows the 'SERENA REQUIREMENTS CONTROL' web application. The top navigation bar includes 'Inbox', 'Requirements Approvals', and 'Projects'. Below this is a table listing several approvals. The detailed view below the table shows the 'Requirements Approval: Round-1 for CAD Endeavor 2012' with a state of 'Awaiting Approval'. It includes buttons for 'Approve', 'Disapprove', 'Comment', and 'Add Approvers'. The 'Business Analyst' is identified as 'Matt Business Analyst (IT)'. The 'ALM Project' is '000249: CAD Endeavor 2012 (Elaboration)'. The 'Requirements Document Version' is 'ePhoto Marketing Reqs V1' and the 'Target Due Date' is '06/01/2012'. At the bottom, there is a table of 'Approval Ballots' with columns for Name, Item Id, Approver, State, and Comments.

| Name | Item Id | Approver | State | Comments |
|-------------------------------|-----------|----------------------------|----------------------|---|
| Round-1 for CAD Endeavor 2012 | BLT000040 | Josh Dev Manager | Accepted w/ Comments | 05/02/2012 06:02:32 PM - Josh Dev Manager: Looks good could safely increase the minimum supported resolution |
| Round-1 for CAD Endeavor 2012 | BLT000041 | Matt Business Analyst (IT) | In Review | |
| Round-1 for CAD Endeavor 2012 | BLT000042 | Kaci Product Owner | Rejected | 05/03/2012 12:34:19 PM - Kaci Product Owner: There is from ACME that requires rethinking the upgrade path, and tables (at a minimum). Everything else looks good, b |

3. On the Approval Ballots tab, review the vote (state) and comments of each approver's Approval Ballot.

TIP To send a reminder or comment to an approver via e-mail, click the name/link of their approval ballot to open it, and then click the envelope icon next to the approver's name.

4. On the Comments tab, you can view all comments, including those that were entered directly into the requirements approval rather than as the result of voting an approval ballot.



5. After reviewing the approval ballots, click the appropriate button, **Approve** or **Disapprove**, to transition the requirements approval to the desired state.

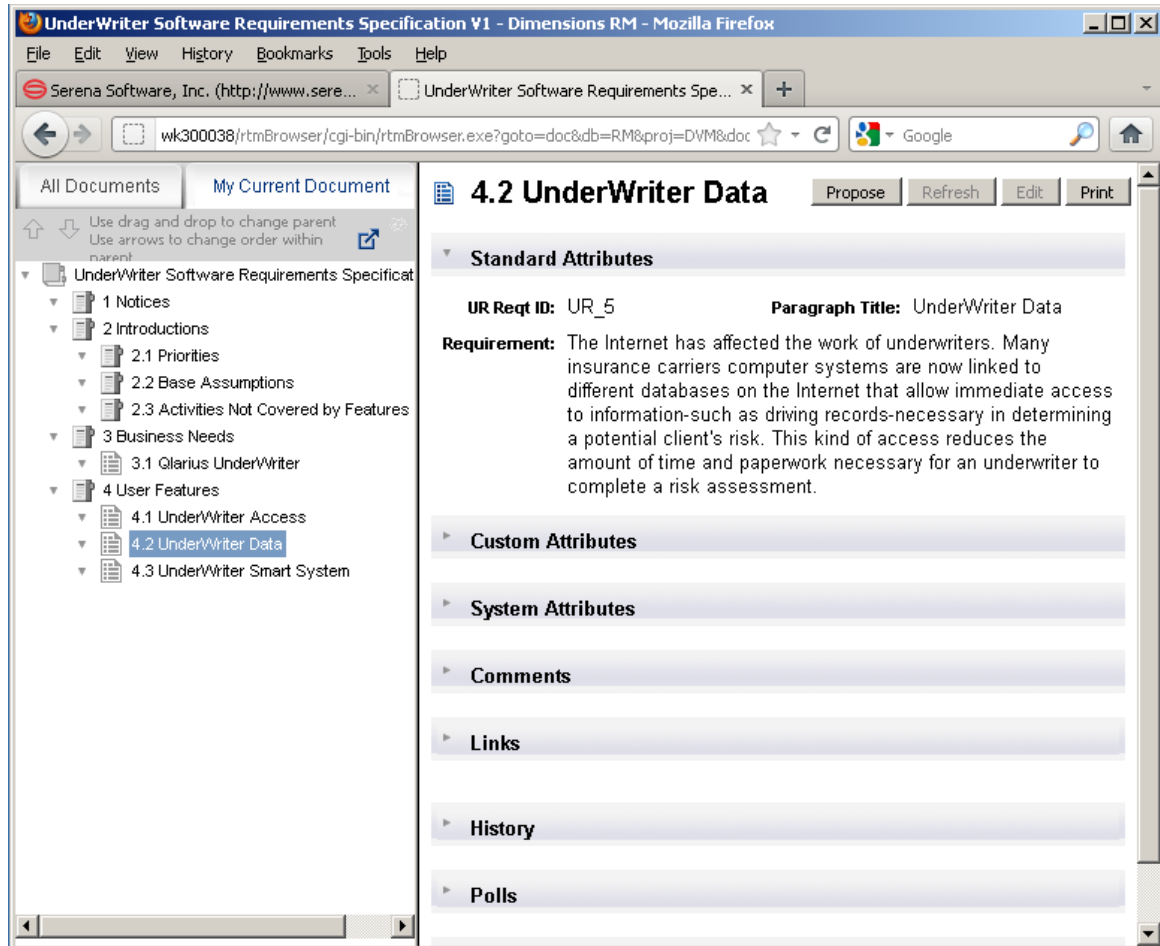
Working with Dimensions RM Requirements Documents

You can view and edit the Dimensions RM requirements document associated with a requirements approval, assuming that your user name exists in Dimensions RM and has the required privileges.

TIP See the *Serena Dimensions RM Browser User's Guide* for more information on working with requirements documents.

To view or edit an associated Dimensions RM requirements document:

1. From any requirements approval or approval ballot, click the **Requirements Document Version** name/link. The Dimensions RM requirements document opens



2. Do any of the following:

- **Propose:** Click to submit a Change Request against the selected requirement.

Submit a Change Request - Dimensions RM - Mozilla Firefox

wk300038/rtmBrowser/cgi-bin/rtmBrowser.exe

User_Requirements: UR_5

Action: Add a comment Submit a change request

Standard Attributes

UR Req ID: UR_5 Paragraph Title: UnderWriter Data

Requirement: The Internet has affected the work of underwriters. Many insurance carriers computer systems are now linked to different databases on the Internet that allow immediate access to information-such as driving records-necessary in determining a potential client's risk. This kind of access reduces the amount of time and paperwork necessary for an underwriter to complete a risk assessment.

Custom Attributes

System Attributes


Comments

Links

History

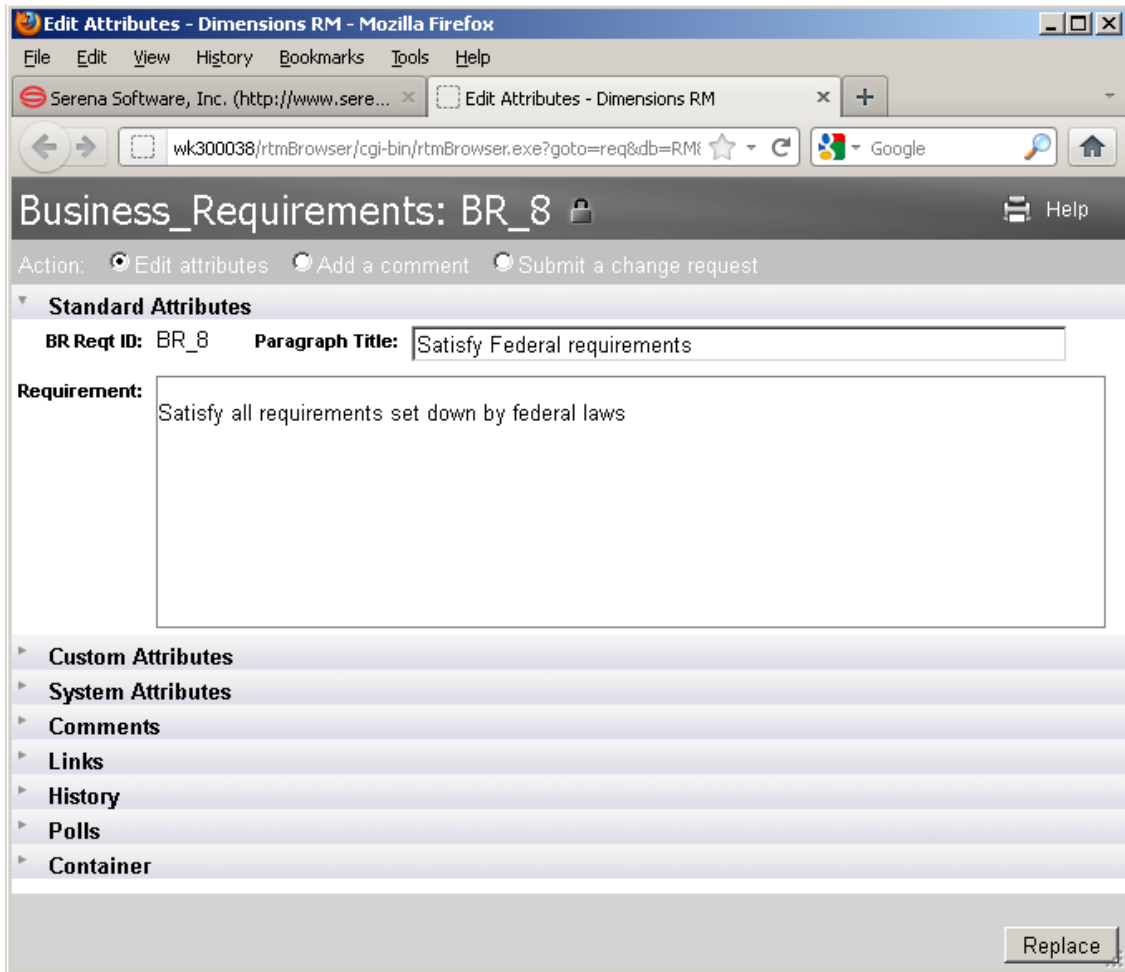
Polls

Container

Reason for change: 

[Show navigation bar](#)

- **Edit:** Click to edit the selected requirement.



NOTE The Comments and Polls on these dialogs are not related or linked to the comments and approval ballots in Requirements Control.

Displaying Project Metrics with Serena Dashboard

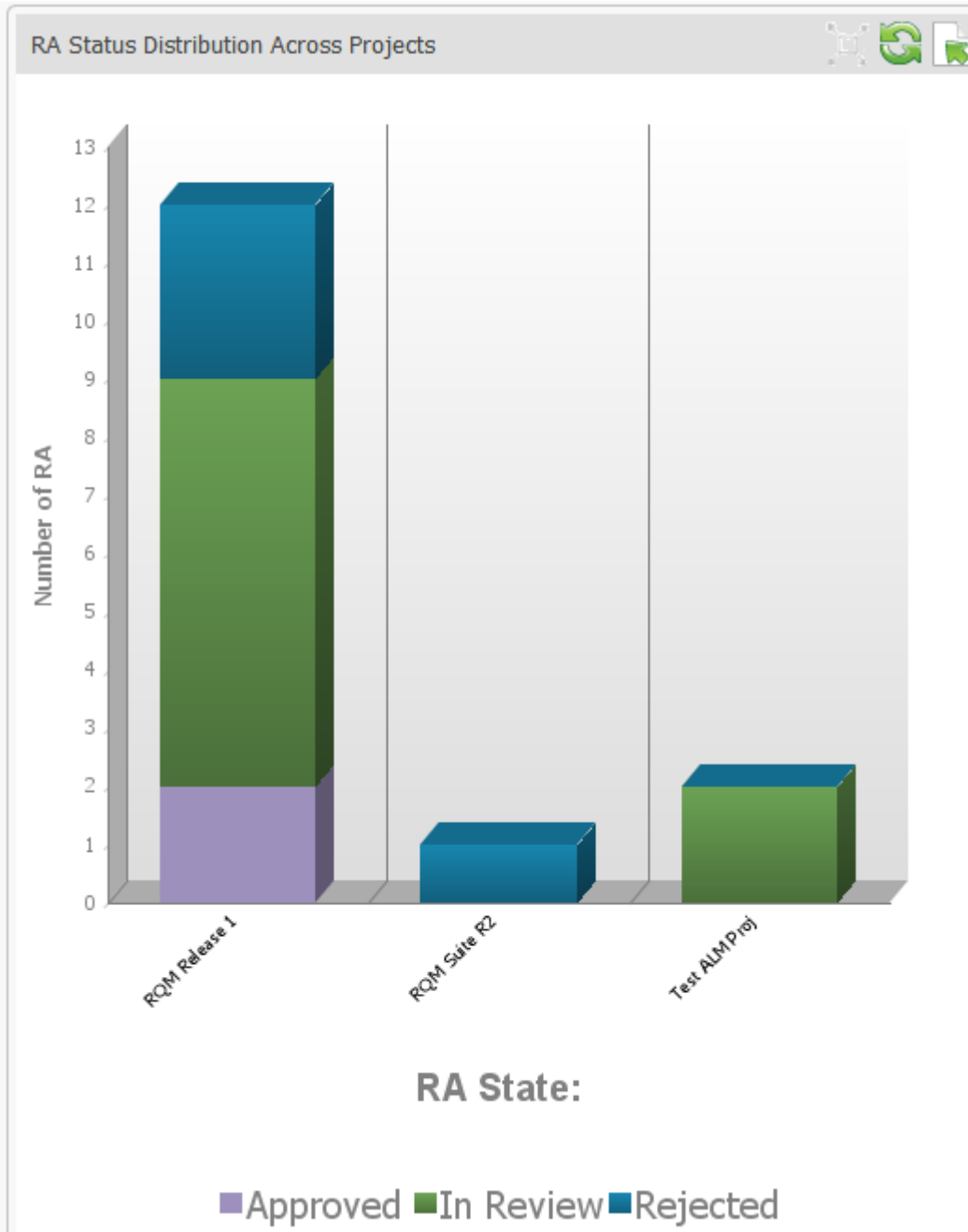
Serena Requirements Manager can be used with Serena Dashboard, a rich, graphical reporting tool that allows you to carefully monitor key performance indicators (KPIs). The Dashboard is fully configurable, and can provide graphical information on any aspects of your projects that managers or executives need to track.

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

Below are a few examples:

| RA Status Distribution Across Projects | | | | |
|--|--|-------------|--------------|----------|
| Projects | Requirements Approval | Description | RA Status | Approver |
| ROM 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) |



NOTE See the Serena Dashboard documentation for more information: <http://help.serena.com/alm/sdb/index.html>.