

# SERENA DASHBOARD

**Getting Started Guide** 

Serena Proprietary and Confidential Information

Copyright © 2011-2012 Serena Software, Inc. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted by such license, no part of this publication may be reproduced, photocopied, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Serena. Any reproduction of such software product user documentation, regardless of whether the documentation is reproduced in whole or in part, must be accompanied by this copyright statement in its entirety, without modification. This document contains proprietary and confidential information, and no reproduction or dissemination of any information contained herein is allowed without the express permission of Serena Software.

The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Serena. Serena assumes no responsibility or liability for any errors or inaccuracies that may appear in this document.

#### **Trademarks**

Serena, TeamTrack, StarTool, PVCS, Collage, Comparex, Dimensions, Serena Dimensions, Mashup Composer, Mashup Exchange, Prototype Composer, Mariner, and ChangeMan are registered trademarks of Serena Software, Inc. The Serena logo, Version Manager, Meritage, and Mover are trademarks of Serena Software, Inc. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

Telelogic and DOORS are either registered trademarks or trademarks of Telelogic AB in the United States and/or other countries. Rational and IBM are either registered trademarks or trademarks of IBM in the United States and/or other countries. Eclipse is a trademark of the Eclipse Foundation in the United States and/or other countries. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

# **U.S. Government Rights**

Any Software product acquired by Licensee under this Agreement for or on behalf of the U.S. Government, its agencies and instrumentalities is "commercial software" as defined by the FAR. Use, duplication, and disclosure by the U.S. Government is subject to the restrictions set forth in the license under which the Software was acquired. The manufacturer is Serena Software, Inc., 1850 Gateway Drive, 4th Floor, San Mateo, California, 94404-4061.

Part number: Product version: 4.0

Publication date: 2012-10-24

# **Table of Contents**

Getting Started	1
Serena Dashboard Overview	. 5
About Serena Dashboard	5
What Is Included Out-of-the-Box	5
Displaying Dashboard Metrics on Mobile Devices	5
Using the Dashboard Out-of-the-Box	. 5
Logging in to Serena Dashboard	5
Setting User Preferences	6
Customizing Your Dashboard Views	6
Out-of-Box Metrics for Serena Release Manager	7
Compare Release Trains	7
Application Release Rates	7
Package Break / Fix Per Stages	7
Deployment Tasks	8
Release Train on Time	8
Deployment Status by Application	9
Deployment Status by Train	10
Out-of-Box Metrics for Serena Development Manager	11
Build Success Rate	11
Defect Escape Rate	11
Project Defects Found / Project Defects By Month	12
Development Packages Iterations	13
Project Packages Count	14
Project Change Requests	15
Project Status	16
Project Duration	16
Test Execution Status Bar	18
Out-of-Box Metrics for Serena Requirements Manager	18
Average Requirement Approval Iteration Count Across Projects	19
Requirement Approval Status Distribution Across Projects	19
Ratio of Requirements to Development Change Requests	20
Out-of-Box Metrics for ChangeMan ZMF	20
All Applications by Instance	20
All packages by Status	21
All Packages by Application	21
All Packages Average Lifecycle	22
All Packages Average Lifecycle by Status	22
Application Packages Average Lifecycle	23
All Packages by Level	24

	All Packages by Type	25
	All Packages Installed by Date	25
	All Packages Scheduled by Date	26
	All Planned Packages by Week	26
	All Unplanned Packages by Week	27
	Build and Recompile Report	27
	Change Activity by All Applications	28
	Change Activity by All Types	30
	Change Activity by All Users	33
	Change Activity by Date	36
	Component Builds by All Applications	37
	Component Builds by All Components	39
	Component Builds by All Users	42
	Component Builds by Month	44
Out	t-of-Box Metrics for CIO Ops	45
	All Service Level Agreement (SLA) Risk	45
	Compliance Summary	46
	Open Incidents by Issue Type	47
	Performance Average	49
	Violates v. In Compliance	50

# **Getting Started with 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.

# Serena Dashboard Overview

# 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.

# Displaying Dashboard Metrics on Mobile Devices

You can display Serena Dashboard metrics using a mobile device, such as an Apple iPad. Your administrator and configure the Dashboard server to enable mobile connections, and then you can set up your mobile device to connect to the Dashboard server. For details on configuring mobile access on the Dashboard server and on connecting your device, please see Enabling Mobile Access.

# Using the Dashboard Out-of-the-Box

# 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 casesensitive.

# 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 following ways:
  - First select an existing view from the Views view, click the Actions button, then select Copy View to Favorites. 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.
- 3. From here, you can set the following:
  - General settings for the view. Under View Settings, the options include:
    - 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.
  - Which metrics are displayed in the view, and how they are laid out. Under Metrics In View, the settings include:
    - Which metrics are available to lay out in the view. Click the Add button to add a new metric. A box appears representing the placement of a metric on the page.
    - How the metrics are laid out in the view. Click and drag in the middle of any metric box in order to move the metric to a different location in the view. Click on the top, bottom, or side walls of a metric and drag to resize it.
    - To choose which metric displays in a box, select the box and choose the metric under Selected Metric. You must choose the package to which the metric belongs before you can select the metric itself.

- 2. Repeat these steps until you have chosen and arranged all of the metrics you want for this view.
- 3. Click Test to preview the changes.
- 4. 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.
- ChangeMan ZMF

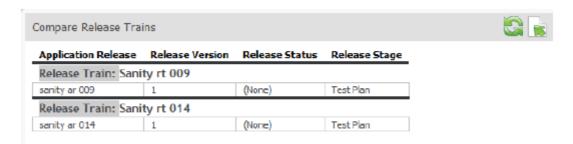
The following metrics are included.

#### **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:



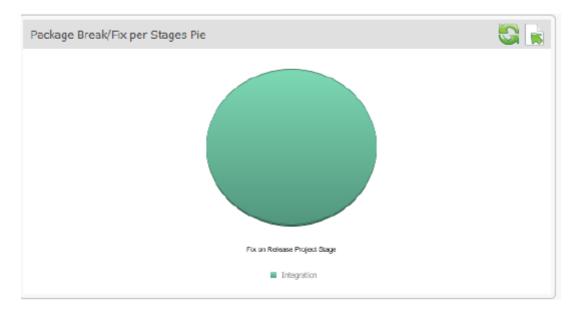
#### **Application Release Rates**

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 display details about where the break-fixes occurred.

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

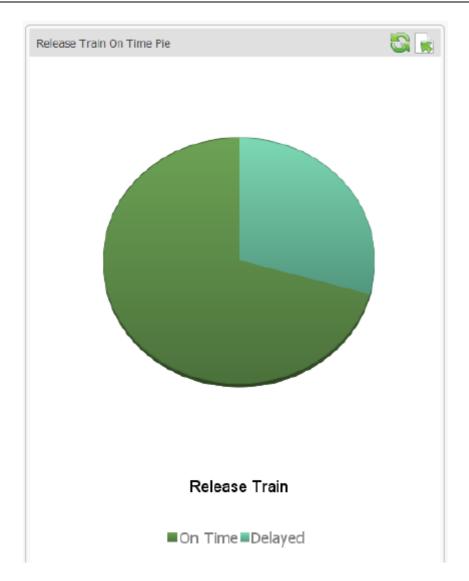


# **Deployment Tasks**

The deployment tasks metric 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**

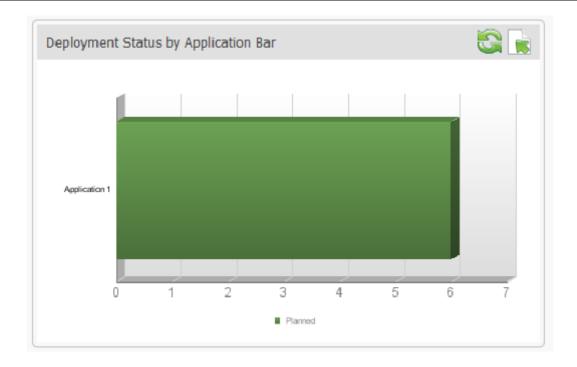
The Release Train on Time metric displays a pie chart that illustrates the number of release trains that are on time and that are delayed, as in the example below:



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:

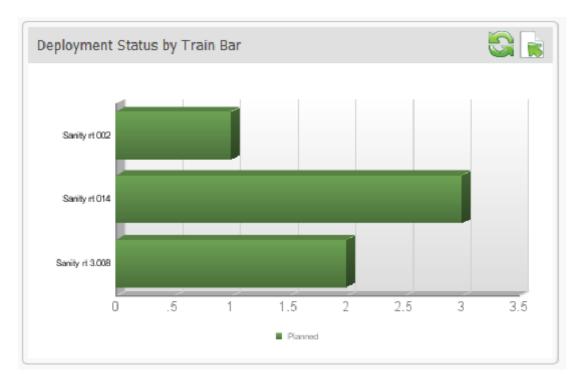


You can represent this data in a pie chart as well, and click a stage to display detailed tabular information about all deployment tasks.

### **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 outof-the-box with the default Development Manager configuration. The Dashboard pulls data from the following sources:

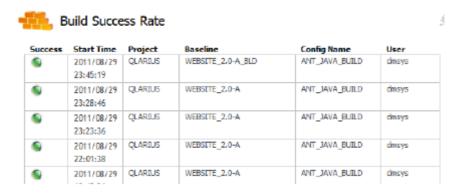
- The Development Control process apps running on SBM
- · Dimensions CM, to display data on build success

#### **Build Success Rate**

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

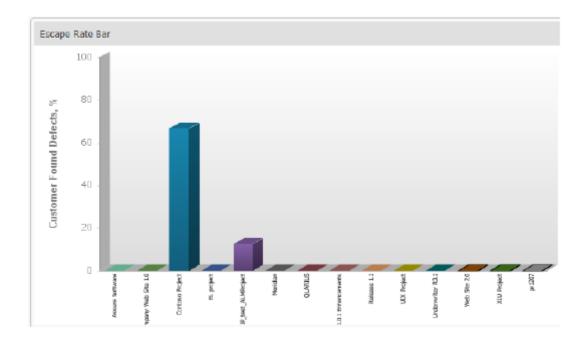


You can click the metric to see information about specific builds, including the name of the Dimensions CM build configuration, when the build stopped, and whether it succeeded.

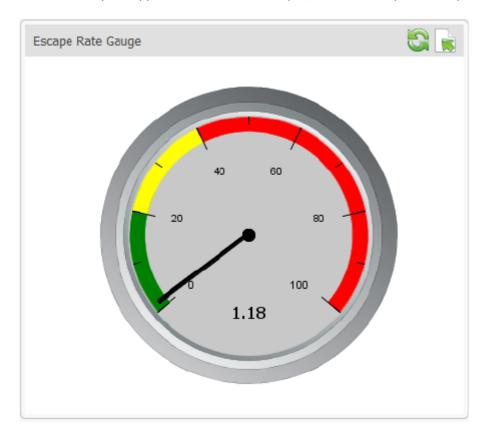


#### **Defect Escape Rate**

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.

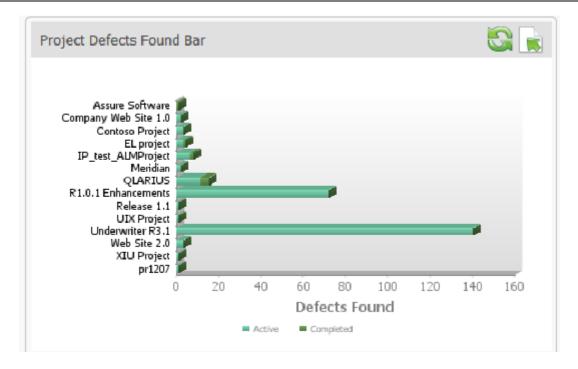


You can also display a Defect Escape Rate Gauge, which shows you the total number of escaped defects across your applications. In this example, there are very few escape defects.



## **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 Iterations**

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

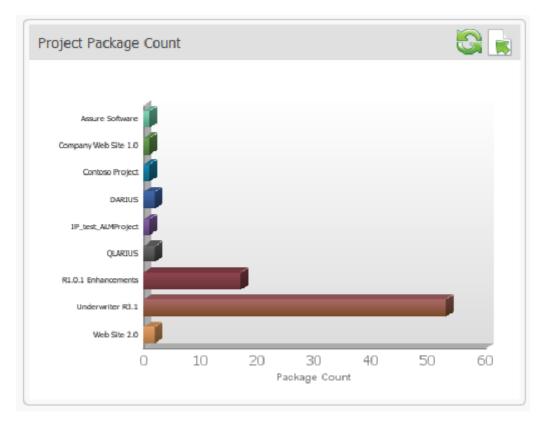


You can also display this data as a pie chart:

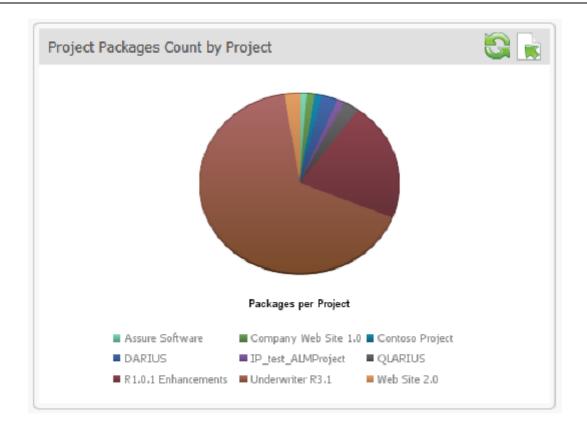


#### **Project Packages Count**

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:

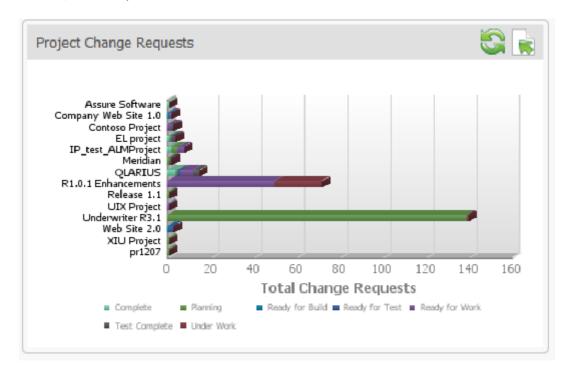


You can also display this data in a pie chart.



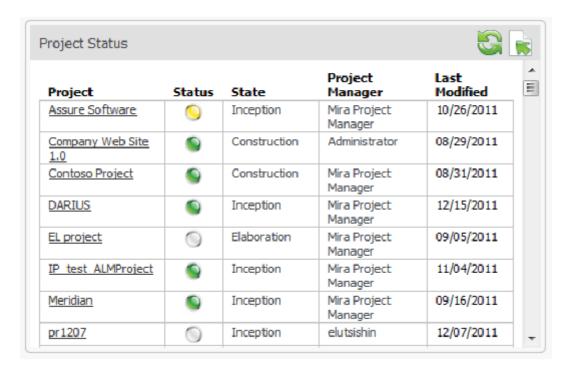
#### **Project Change Requests**

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.



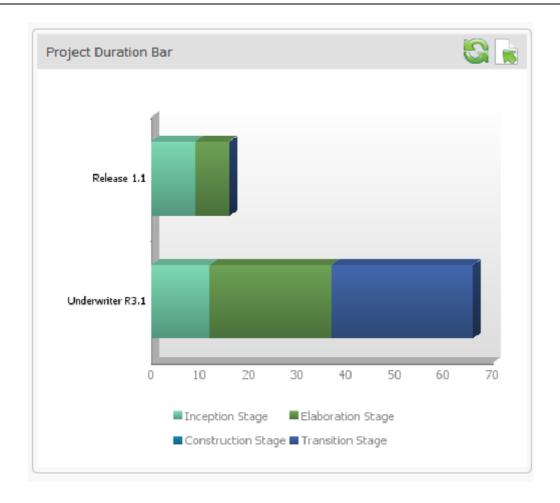
#### **Project Status**

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.

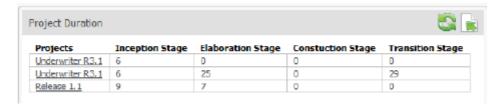


#### **Project Duration**

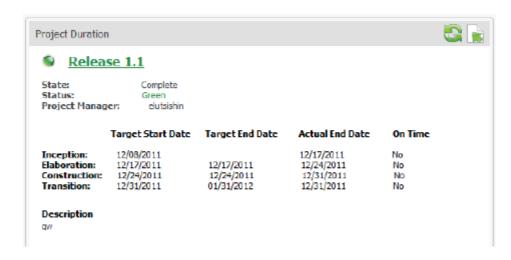
The Project Duration metric displays the number of days that projects has spent in each phase of the development lifecycle. You can display this data in a bar chart, such as the following:



You can display this data in tabular format as well:

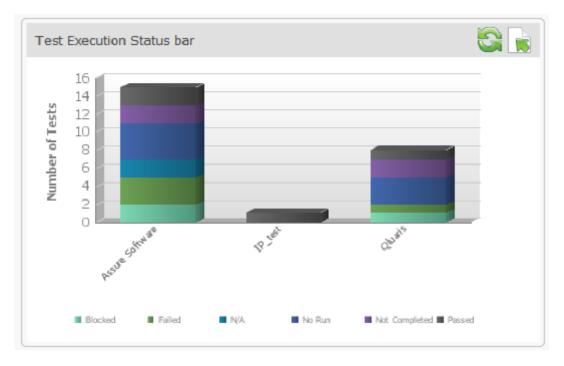


The Release 1.1 project spent 9 days in the Inception stage and 7 days in the elaboration stage. Click any project name to detailed start and end dates for each phase:



#### **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.

Test Execution Status bar									
Assure Software :: No Run									
ID Test Name Test Folder OA Test Date									
ID	Test Name	Test Folder	QA	Test Date					
_	Test Name Password input - positive case	Test Folder Assure Software	<b>QA</b> hpadmin	Test Date					
1 4	12321121112								
1	Password input - positive case	Assure Software	hpadmin						

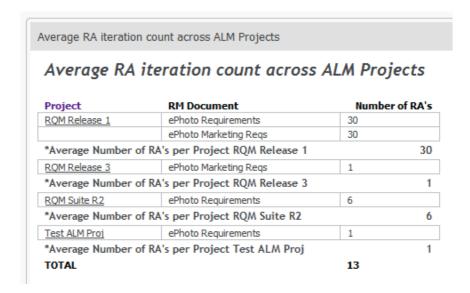
# Out-of-Box Metrics for Serena Requirements Manager

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

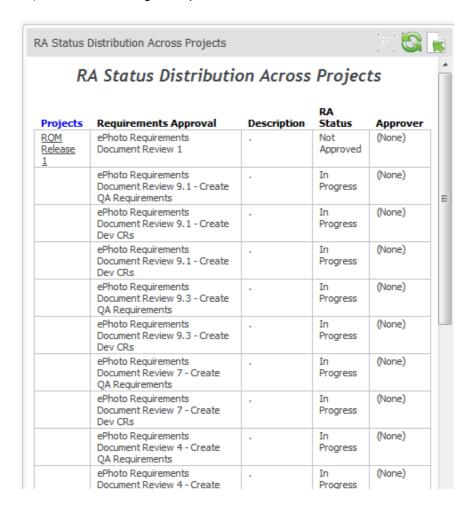
#### **Average Requirement Approval Iteration Count Across Projects**

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.



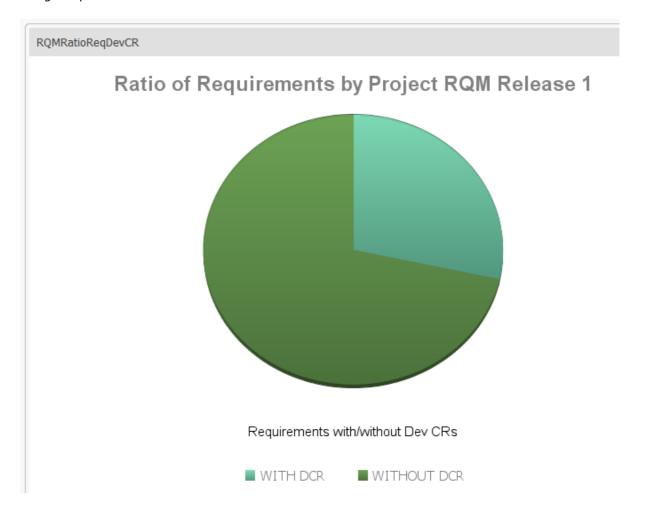
#### **Requirement Approval Status Distribution Across Projects**

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



# **Ratio of Requirements to Development Change Requests**

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

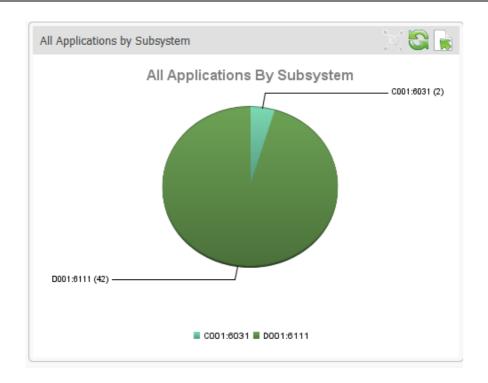


# Out-of-Box Metrics for ChangeMan ZMF

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

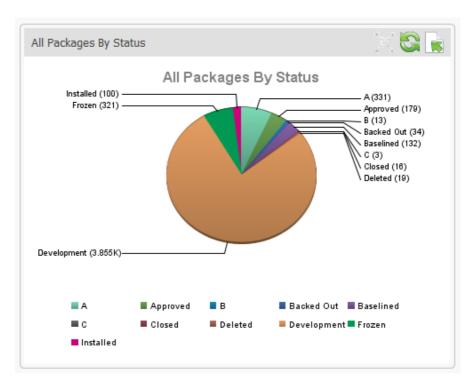
# **All Applications by Instance**

You can display all applications broken down by instance or sub-system.



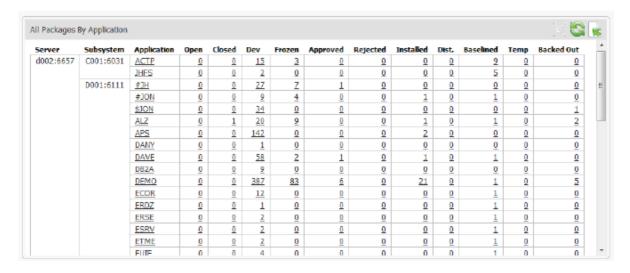
# All packages by Status

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



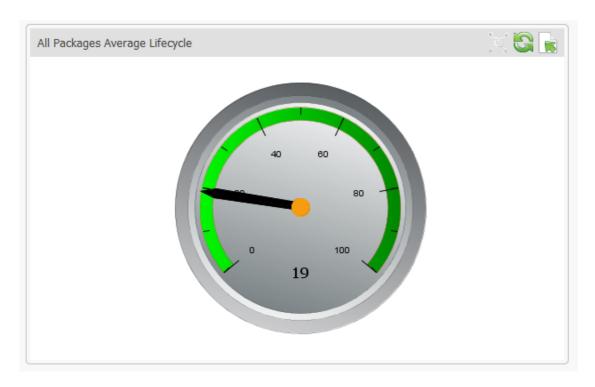
# **All Packages by Application**

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



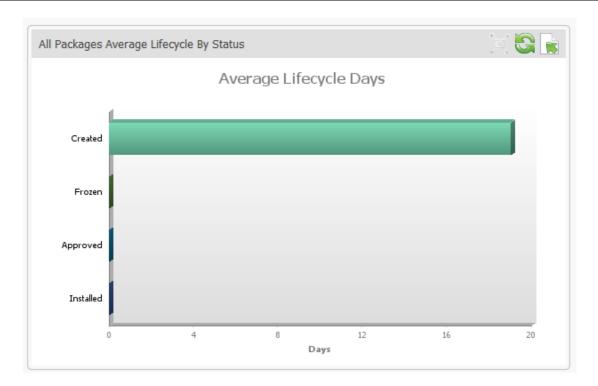
# **All Packages Average Lifecycle**

This metric displays the average lifecycle span for all packages.



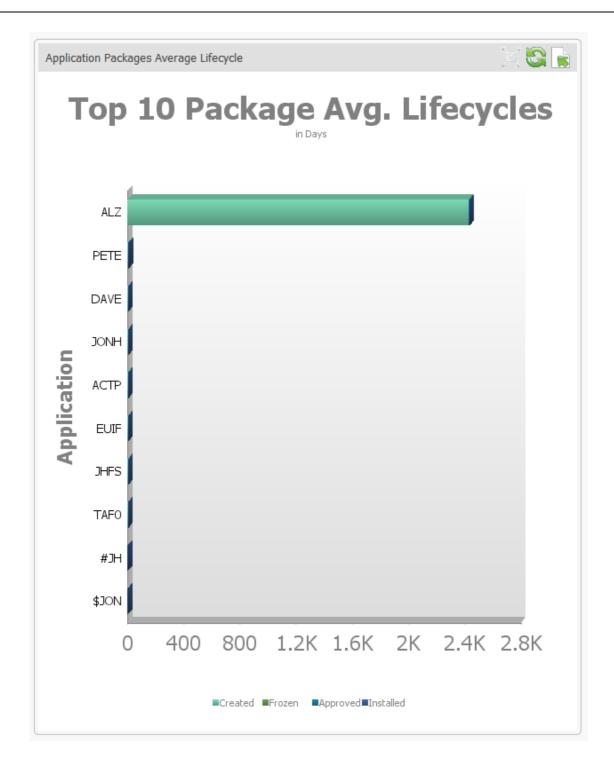
# All Packages Average Lifecycle by Status

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



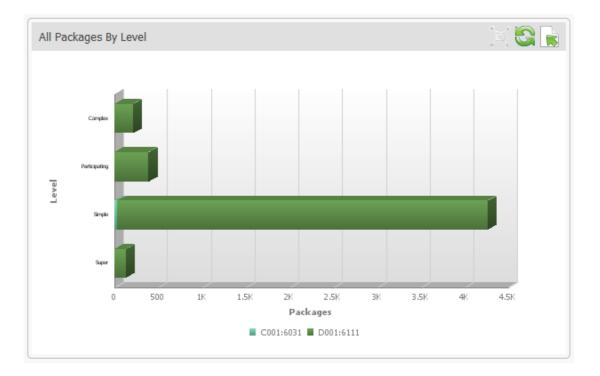
# **Application Packages Average Lifecycle**

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



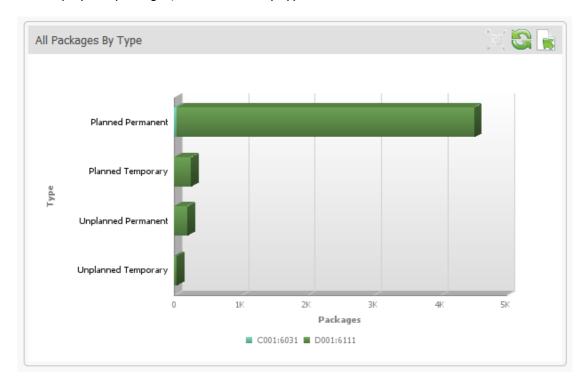
# All Packages by Level

This metrics displays all packages, broken out by level.



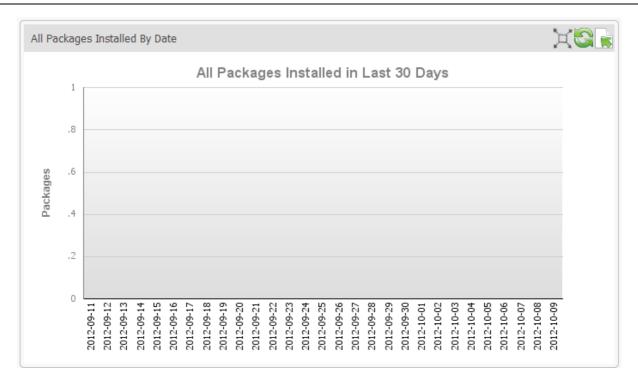
# All Packages by Type

This metric displays all packages, broken down by type.



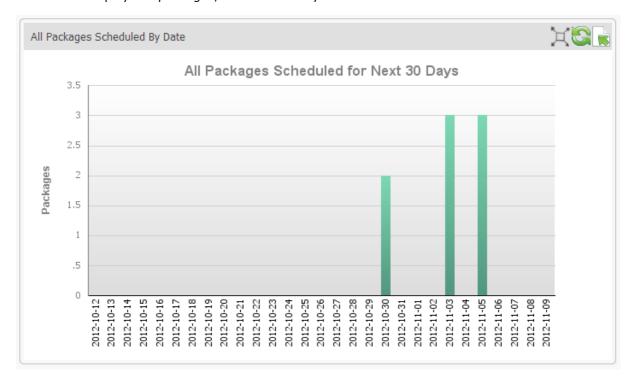
# All Packages Installed by Date

This metric displays all packages, broken down by installation date.



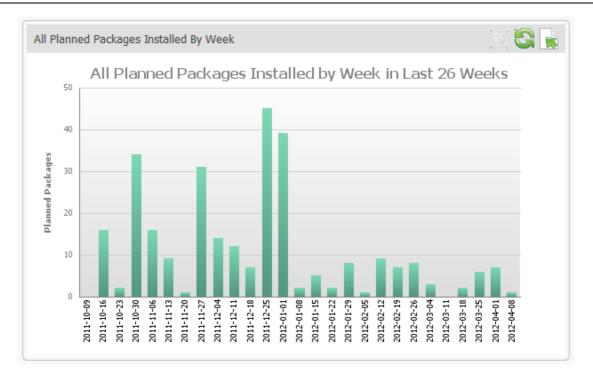
## All Packages Scheduled by Date

This metric displays all packages, broken down by their scheduled date.



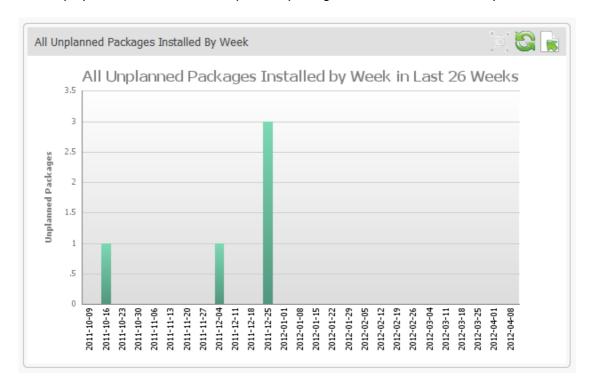
#### **All Planned Packages by Week**

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.



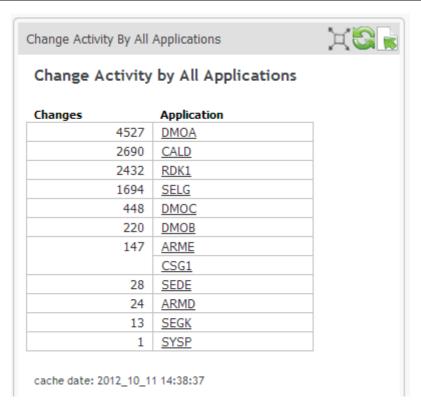
#### **Build and Recompile Report**

This metric displays the number of builds and recompiles and all packages.

uild and Recompile Report							
Instance	Component	Арр	Package	Builds	Recompiles		
SEREZMFS	DMOAA0	DMOA	DMOA000057	10	0		
			DMOA000083	2	0		
			DMOA000088	1	0		
			DMOA000090	1	0		
			DMOA000132	0	1		
	DMOAC0	DMOA	DMOA000050	1	0		
			DMOA000051	2	0		
			DMOA000052	4	0		
			DMOA000053	1	0		
			DMOA000054	1	0		
			DMOA000055	1	0		
			DMOA000084	1	0		
			DMOA000085	1	0		
			DMOA000086	7	0		
			DMOA000087	1	0		
			DMOA000089	3	0		
			DMOA000102	1	0		
			DMOA000103	1	0		
			DMOA000104	2	0		
			DMOA000105	2	0		
			DMOA000106	1	0		
			DMOA000120	1	0		
			DMOA000127	1	0		
			DMOA000130	1	0		
			DMOA000135	1	0		
			DMOA000138	1	0		
			DMOA000177	1	0		
		DMOC	DMOC000012	6	0		
			DMOC000015	1	0		
			DMOC000026	1	0		
			DMOC000027	1	0		
			DMOC000028	1	0		
			DMOC000029	1	0		
	DMOBA0	DMOB	DMOB000012	1	0		
			DMOB000013	1	0		
	DMOBC0	DMOB	DMOB000010	2	0		

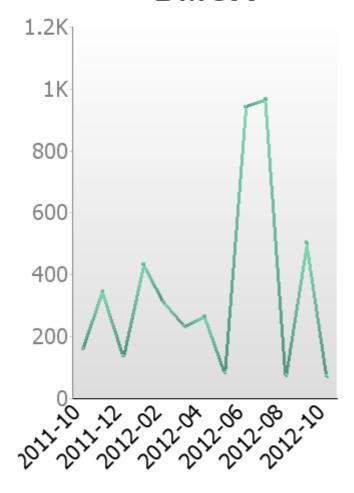
# **Change Activity by All Applications**

This metric displays change activity for all applications.



Click an application name to display change activity for that application, by date.

# **Change Activity by DMOA**

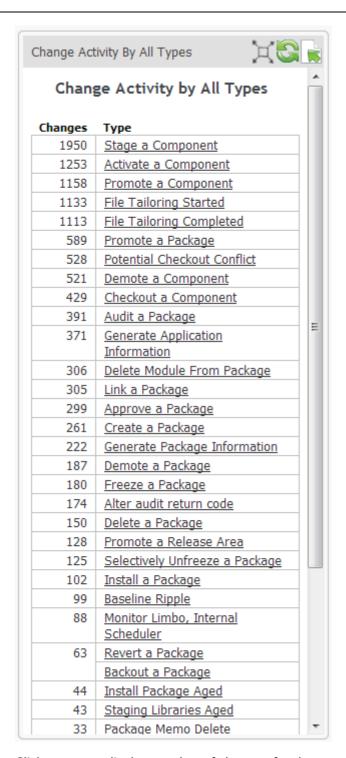


# Months

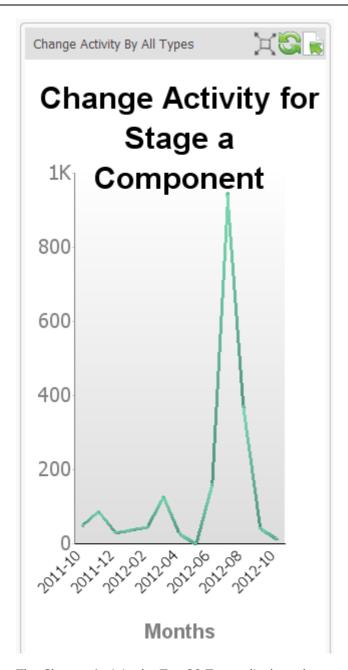
The Change Activity by Top 20 Applications metric displays the activity for the applications with the most change activity.

#### **Change Activity by All Types**

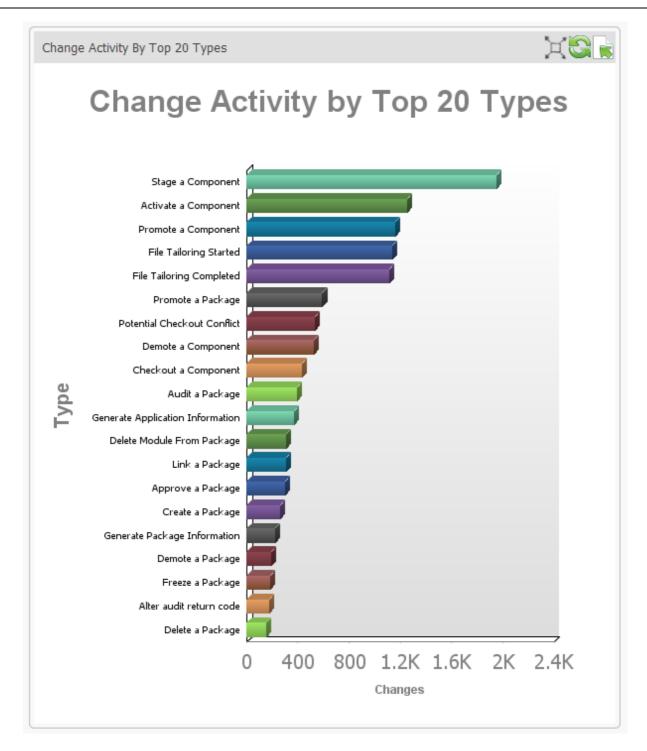
This metric displays total change activity, broken down by type.



Click a type to display number of changes for that type, by date.



The Change Activity by Top 20 Types displays the amount of activity for the 20 types with the most activity.



# **Change Activity by All Users**

This metric displays change activity, broken down by users.

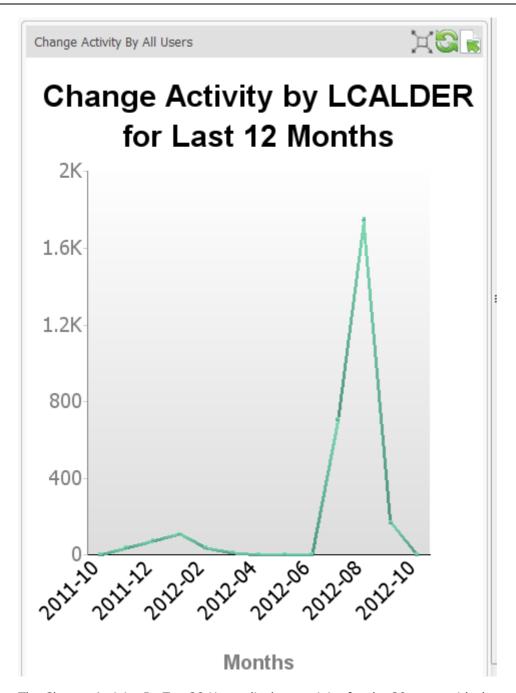
# Change Activity By All Users

# Change Activity by All Users

User	Changes	PKG Create	CMP Checkout	CMP Stage	PKG Audit	PKG Freeze	PKG Promote	PKG Approve	PKG Revert
LCALDER	2898	26	0	925	4	8	135	4	5
RKOEHLE	2401	43	0	280	108	28	89	97	7
LGASCA	2270	61	0	264	48	35	180	64	9
BYATES	1342	44	0	204	33	35	32	50	14
GKESTLE	811	15	0	76	61	14	22	20	6
MLEVY	533	20	0	51	3	18	28	23	4
GVANNES	383	9	0	46	29	7	6	13	2
<b>EMITCHE</b>	370	10	0	14	28	11	46	10	0
SERE	320	0	0	0	0	0	0	0	0
DFALVEY	273	6	0	7	22	9	19	4	6
KLEE	211	1	0	3	13	5	22	0	4
GKESTL2	151	1	0	27	18	1	2	2	1
<u>OFAURA</u>	136	6	0	28	1	1	4	0	1
LGASCA2	99	5	0	13	5	0	4	0	0
MPANNIS	93	11	0	0	15	5	0	12	0
MMCCART	43	0	0	12	0	0	0	0	0
BROSENB	16	0	0	0	0	3	0	0	4
SNEVIN	12	2	0	0	0	0	0	0	0
<u>FCAMUTO</u>	3	0	0	0	1	0	0	0	0
BYATES2	3	1	0	0	0	0	0	0	0
GKESTL3	2	0	0	0	2	0	0	0	0
TMAVOR	1	0	0	0	0	0	0	0	0

cache date: 2011\_10\_10 14:38:37

Click a username to display change activity for that user, for the past 12 months.

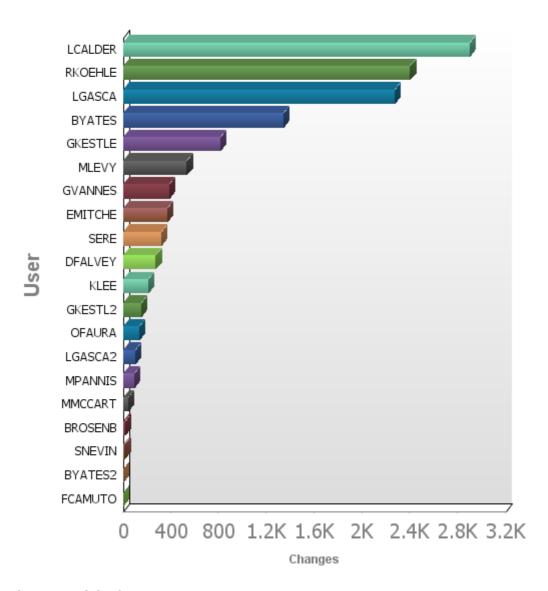


The Change Activity By Top 20 Users displays activity for the 20 users with the most change activity.

Change Activity By Top 20 Users

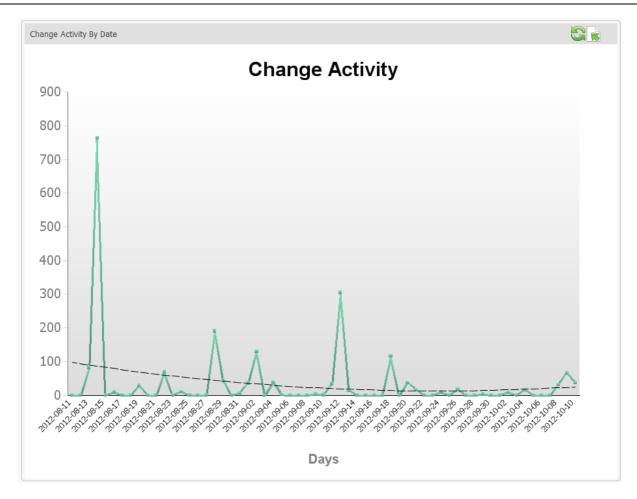


# Change Activity by Top 20 Users



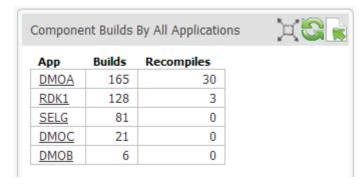
# **Change Activity by Date**

This metric displays the amount of change activity on specific dates.

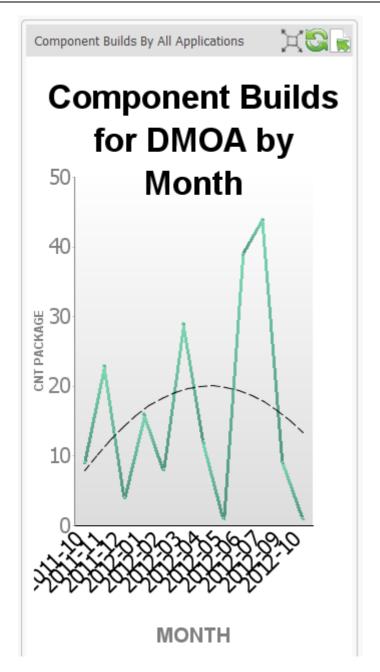


## **Component Builds by All Applications**

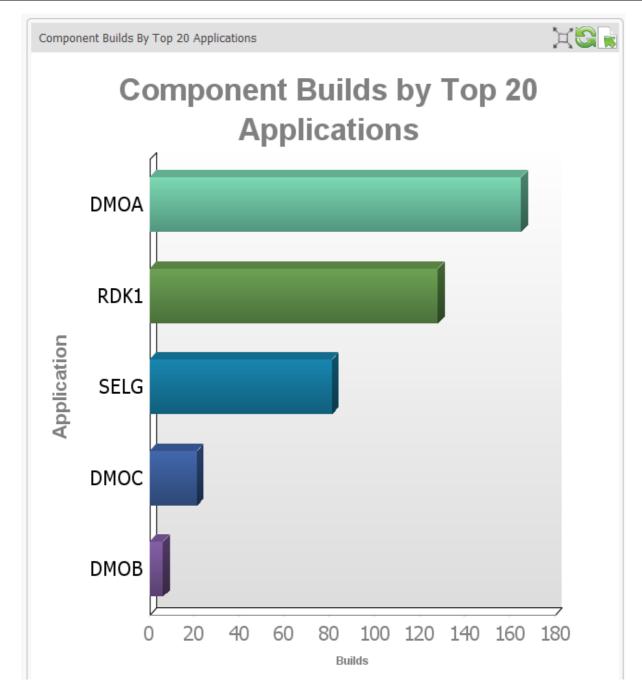
This metric displays component builds broken down by applications.



Click an application name to display builds broken down by month.

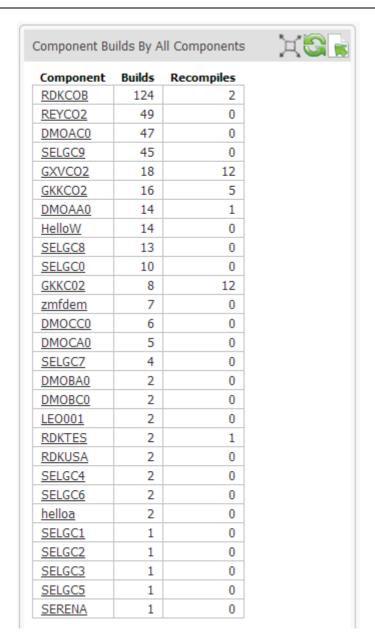


The Component Builds by Top 20 Applications shows the build activity for the applications with the most builds.

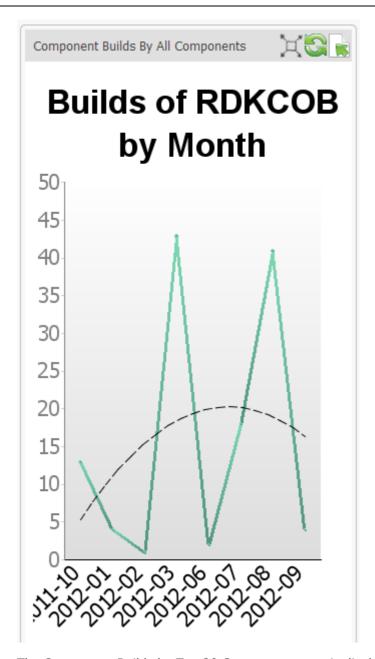


## **Component Builds by All Components**

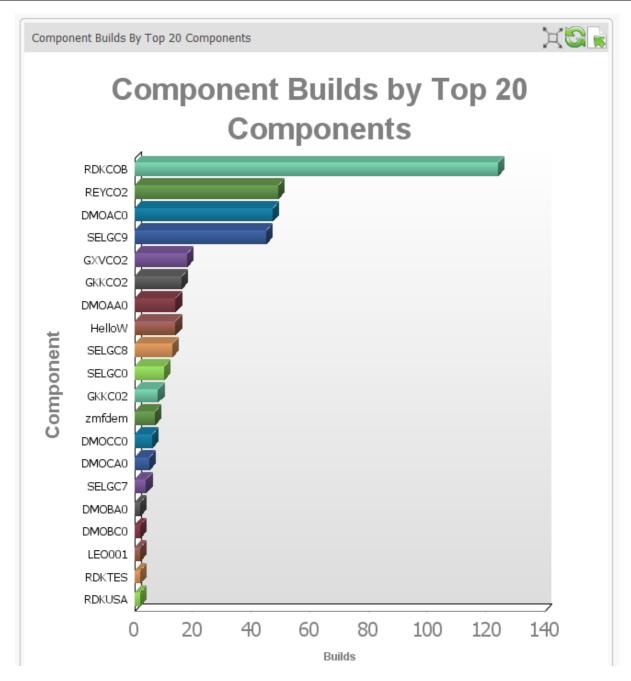
This metric displays component builds broken down by components.



Click a component name to display build totals per month for that component.

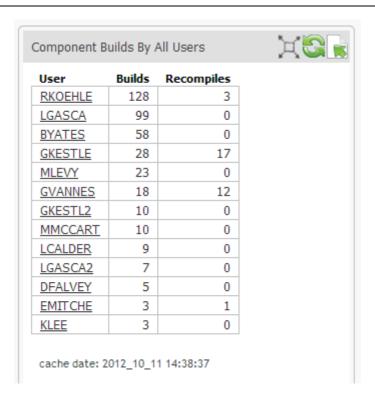


The Component Builds by Top 20 Components metric displays build totals by the 20 components with the most builds.

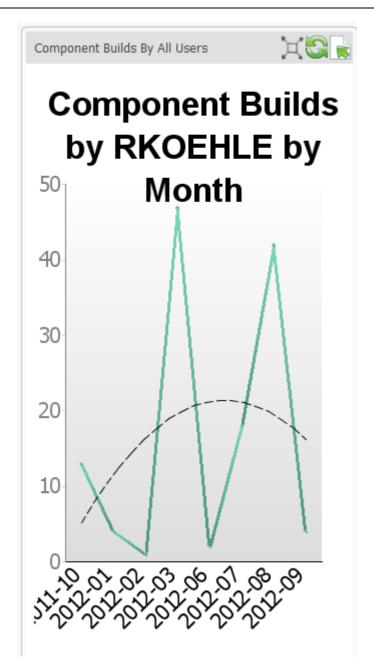


# **Component Builds by All Users**

This metric displays component build totals, broken down by users.



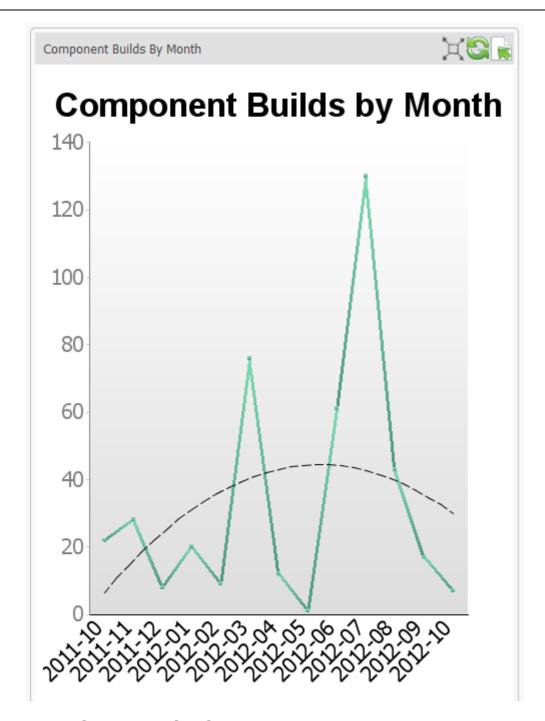
Click a user name to display monthly build totals by that user.



The Component Builds by Top 20 Users displays build totals for the 20 users with the most builds.

### **Component Builds by Month**

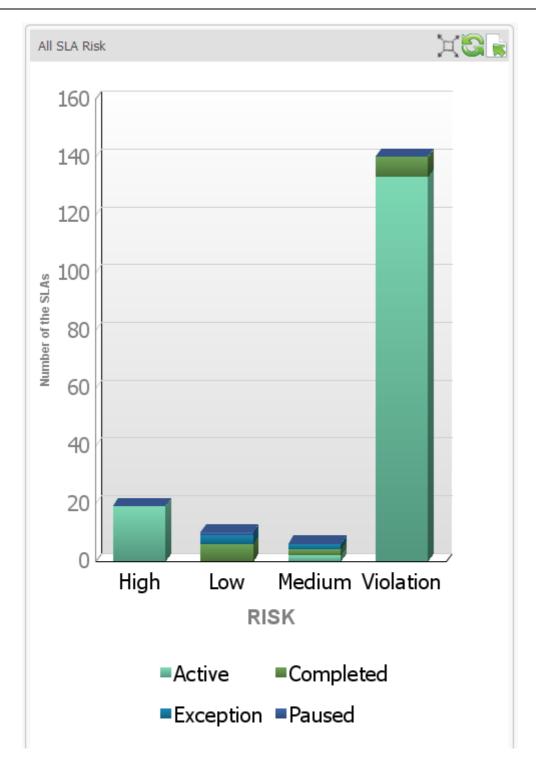
This metric displays all component builds, broken down by month.



# **Out-of-Box Metrics for CIO Ops**

## All Service Level Agreement (SLA) Risk

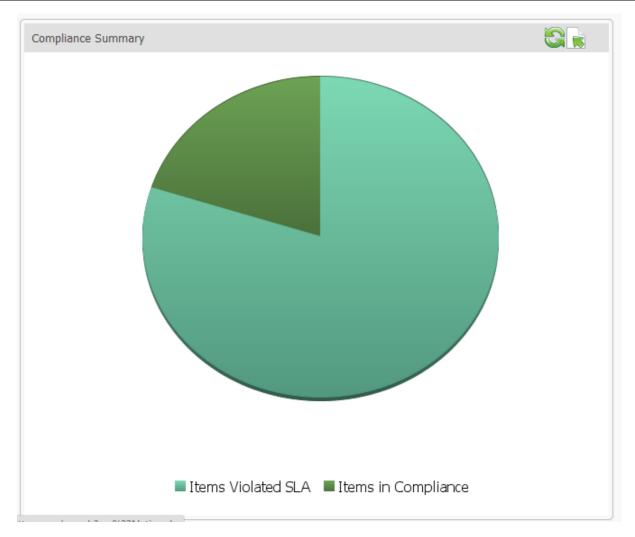
This metric provides a high level view of the number of service level agreements classified as high risk, low risk, medium risk, or in violation. This metric also displays the number of SLAs in each of these risk categories that are currently active, completed, paused, or that are exceptions.



To display details, you can click any part of the bar in the metric. This first displays a zoomed version of that portion of the bar. Click the bar again to display the specific SLAs.

### **Compliance Summary**

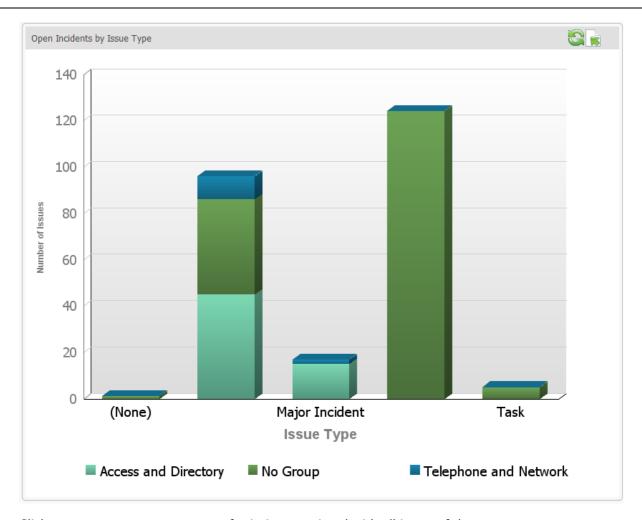
This metric shows you the number of items in compliance with Service Level Agreements and the number of items not in compliance.



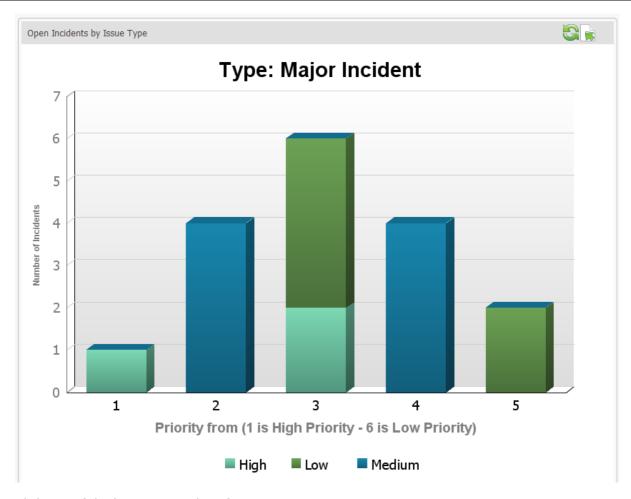
Click to see more information about the state of items either in compliance or in violation.

# Open Incidents by Issue Type

This metric displays the number of open incidents, categorized by incident type.



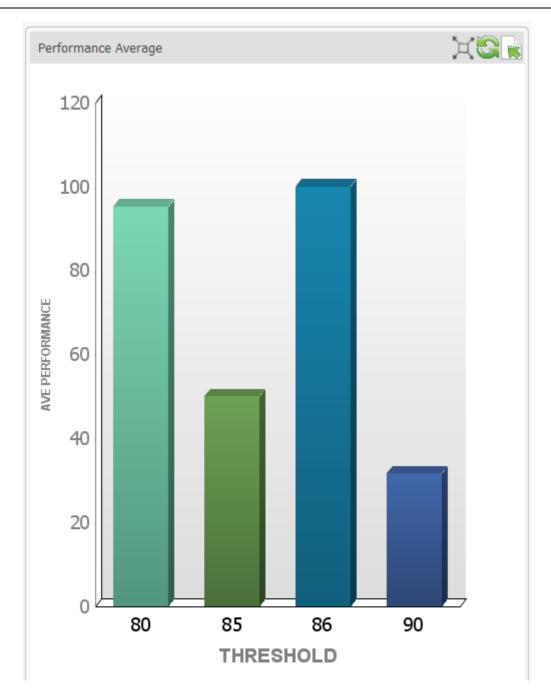
Click any type to see a summary of priority associated with all items of that type.



Click any of the bars to see a list of items.

## **Performance Average**

This metric displays average performance.



Violates v. In Compliance

