



**SERENA®**  
**BUSINESS MANAGER**  
**Quick Start Guide**

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# Welcome to Serena<sup>®</sup> Business Manager

SBM is a full-featured process app management tool that enables you to create process apps that pull and manage information and work-tracking items from different sources. Similarly, you can use SBM to manage orchestrations for your business processes, including access to other Web services and third-party applications.

## Audience and Scope

This document is intended for users who are considering purchasing and implementing SBM. It describes the simplest installation scenario to help you get a system running quickly. It also provides an introduction to process apps and how to get started with the sample process apps that Serena provides.

This document describes how to install and set up SBM for evaluation purposes only. When you are ready to install SBM in your production environment, follow the steps described in the *SBM Installation and Configuration Guide*.

For more information about SBM, refer to the SBM documentation available at the [Documentation Center](#).

## Getting Started

Before you begin the install, familiarize yourself with the various SBM server components.

- [SBM Components \[page 5\]](#)
- [Comparison: SBM Composer and SBM Application Administrator \[page 6\]](#)

## SBM Components

The following components are found in SBM. Note that SBM Configurator is not a component; it is launched immediately after the suite installer and included in every SBM installation.

SBM Application Engine	The component in SBM that executes applications. It powers Serena Work Center, SBM User Workspace, and SBM Application Administrator (the interface administrators use to work with applications).
SBM Orchestration Engine	The component in SBM that executes system workflows defined in orchestrations. Using SBM Composer, a designer can include Web services in an orchestration, which can then be executed in response to an event or by transitions in applications.
SBM Application Repository	A Web-based component that is responsible for the deployment and promotion of process apps to runtime environments. It also stores versions of process apps and their design elements as they are published or checked in using SBM Composer.

Single Sign-On (SSO)	Refers to Serena-installed software that enables a user to log in to a Web-based component of SBM and be recognized on subsequent accesses to that component or other Web-based components of SBM. This software also provides the ability for security tokens to be used in an orchestration, allowing Web services to be called without requiring the user to provide credentials at inconvenient times.
SBM Common Services	SBM Common Services powers the REST Grid and PDF widgets, Smart Search, and Agile services for Work Center backlogs.
SBM Mail Services	Consists of the Notification Server and Mail Client services. The Notification Server sends notifications and e-mail messages to SBM users. The Mail Client enables the E-mail Submission and the E-mail Recorder features.
SBM Logging Services	Powers solution usage reports in Serena Work Center and performs active diagnostics, which capture SBM Application Engine Web Server events that occur without requiring you to stop the IIS services. Once you start the SBM Logging Services service, all activities and events that are processed by the SBM Application Engine Web Server are logged, including the end-to-end processing of workflow activities that fire orchestrations.
SBM Composer	A Windows client application that designers can use to create, edit, and deploy process apps.
SBM System Administrator	A Windows application that administrators use to configure SBM Application Engine. SBM System Administrator is used to configure system settings and run database utilities, such as the Data Import Wizard.
Serena License Manager	The Serena License Manager (SLM) is a separate component that allows administrators to centralize license management across multiple software tools. The Serena License Manager helps administrators keep track of active licenses.
SBM Configurator	SBM Configurator provides a graphical interface that enables you to configure the settings and layout of your installation (whether hosted on a single server or distributed across multiple servers). You can run SBM Configurator any time after the install to re-configure your installation.

## Comparison: SBM Composer and SBM Application Administrator

SBM has two components, SBM Composer and SBM Application Administrator, that you use to create and manage applications and orchestrations.

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In general, these two components are used as follows:

- **SBM Composer** is used to design process apps, applications, and orchestrations. This includes designing workflows, custom forms, actions, and other elements. You also use SBM Composer to create roles and tie the roles to particular states or transitions.
- **SBM Application Administrator** is used to configure applications after they are deployed. Specifically, you can add projects and make certain process overrides, add user and group accounts, assign users to specific roles, and create notifications.

The following sections describe the tasks you perform in each component.

## Project Management

The following table describes the project management tasks that are performed from each component:

Task	Tool
Creating and editing projects	SBM Application Administrator

## Workflow, State, and Transition Management

The following table describes which workflow, state, and transition management tasks are performed from each component:

Task	Tool
Creating a workflow (application or orchestration)	SBM Composer
Adding states to a workflow	SBM Composer
Adding transitions to a workflow	SBM Composer
Adding, deleting, or modifying actions for a state or transition (including scripts, triggers, events, Web services, and transitions)	SBM Composer
Restricting transitions by type, role, or rule	SBM Composer
Restricting transitions by group	SBM Application Administrator
Creating forms	SBM Composer
Associating privileges with a form (using roles)	SBM Composer

## Table and Field Management

The following table describes which table and field management tasks are performed from each component:

Task	Tool
Adding a primary or auxiliary (non-system) table	SBM Composer
Adding system auxiliary tables (created when you create a database with Create Database wizard)	SBM System Administrator
Adding fields to a table	SBM Composer
Modifying field properties	SBM Composer
Modifying field overrides in a workflow, state, or transition	SBM Composer
Setting general field overrides	SBM Composer
Setting field overrides for specific projects or user fields	SBM Application Administrator
Adding roles to a user-type field	SBM Composer
Adding groups or users to a user-type field in primary table (via workflows)	SBM Application Administrator
Adding groups or users to a user-type field in an auxiliary table	SBM System Administrator
Enabling data import for primary or auxiliary tables	SBM System Administrator
Importing data into primary or auxiliary tables from a spreadsheet	SBM Application Administrator
Importing data into primary or auxiliary tables using an ODBC connection	SBM System Administrator

## User, Group, and Role Management

The following table describes which user, group, and role management tasks are performed from each component:

Task	Tool
Creating roles	SBM Composer

Task	Tool
Creating users and groups	SBM Application Administrator
Assigning permissions to roles	SBM Composer
Assigning privileges to users	SBM Application Administrator
Assigning privileges to groups	SBM Application Administrator
Assigning users to groups	SBM Application Administrator
Assigning users and groups to roles	SBM Application Administrator
Modifying privileges for specific project or field section	SBM Application Administrator

## Installation and Configuration

- [Installation Considerations \[page 9\]](#)
- [About the Sample Database \[page 10\]](#)
- [Installing and Configuring SBM \[page 11\]](#)
- [Verifying Installation \[page 14\]](#)
- [Installing SBM Composer \[page 17\]](#)

## Installation Considerations

You can install SBM in its entirety (including SBM Composer) using the SBM suite installer or you can install only SBM Composer using the client installer. If you only install SBM Composer, you can design applications and process apps, but you cannot publish them to the repository or deploy them to SBM Application Engine for running and testing.

Read the following scenarios to help you decide what to download and install.

### Install SBM if:

- You want to access and use sample process apps in Serena Work Center.
- You want to evaluate the end-to-end process of designing, publishing, and deploying process apps.
- You want to modify sample process apps and view your changes in Serena Work Center.

- You want to explore the repository, which is used to store and track versions of design elements created in SBM Composer.

**Install only SBM Composer if:**

- You want to design your own workflow without publishing and deploying it to the SBM User Workspace.
- You want to explore the concept of roles and how they can be used to restrict workflow transitions.
- You want to design custom forms, and are satisfied with previewing them in SBM Composer.

If you decide that you only want to install SBM Composer, skip ahead to [Installing SBM Composer \[page 17\]](#).

## About the Sample Database

The sample database that is supplied with SBM contains real data, which you can use to test your installation. The database is designed to get SBM up and running quickly, allowing users to test and use the features that are available without having to manually add all of the necessary data. The sample database is a single database that contains all of the tables for each of the SBM databases.

## Sample Process Apps

The sample database is pre-populated with users, process apps, and data. This allows you to explore the functionality available in SBM by logging in as the sample users and working with the items in the database.

The sample database includes the following process apps:

- **Issue Defect Management**

Manages the capture, triage and resolution process for software or hardware issues (bugs). This process app includes the Animation Pro and the Image Builder sub-projects.

- **Change Approval Requests**

Works for any type of change approval, whether it be a request for modifying an IT system or a software application. It allows you to manage the Change Review Board voting process, and when used in conjunction with Issue Defect Management, send approved Change Requests to Development for implementation.

- **Incident Management**

Includes a full-featured service-desk for capturing, routing and resolving incidents. When used in conjunction with Issue Defect Management, you can seamlessly escalate incidents into the development process for resolution.

## Sample Login IDs

You can log in to the sample database using the following accounts that represent various user roles. No password is required.

- **Management Roles**

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- **Carmen** – A chief officer whose Incident Management home page displays a rich graphical report of the active incidents by type and status. Carmen can click on the report to drill-down for further details.
  - **Joe** – An upper-level manager who has extensive privileges in all three applications. Joe's IDM home page shows a multi-view report giving him a high level overview of the status of the projects in IDM.
  - **Engineer Roles**
    - **Samir** – A software engineer who has privileges to view, submit, update, and transition items in the Issue Management solution. Samir also has limited privileges in the Incident Management and Issue Defect Tracking applications.
    - **Newton** – A software engineer with the same access as Samir. Both users are members of the Engineers group.
  - **Tester Roles**
    - **Chris** – A tester who, like Newton and Samir, primarily works in the Issue Defect Management application. Use this login ID to see how issues move through the testing cycle.
    - **Hans** – A technical analyst, who performs the role as a technical analyst in the Change Request application and is part of the IDM team.
  - **Support Roles**
    - **Tom** – A Support manager who primarily uses the Incident Management solution. He also has limited privileges to the Issue Defect Management solution, enabling him to submit and view items into development projects.
    - **Chad** – As a level-one support technician, Chad's primary job is to answer customer questions as he is able, and then assign the remaining to another support technician. Chad can also search for customers, add new customers, search the Knowledge Base, run reports, and submit new incidents.
    - **Ethan** – A level-two support technician whose job is to answer questions that Chad cannot.

## Installing and Configuring SBM

For evaluation purposes, these instructions walk you through installing SBM on a 64-bit Windows machine. To get up and running quickly, you will also install Microsoft SQL Express on this machine (if needed) and restore the SBM sample database.



**Remember:** The installation and configuration steps that are provided in this guide are intended to help you start evaluating SBM right away using default configuration settings where necessary. When you perform the SBM install for use in a production environment, read the *SBM Installation and Configuration Guide* to understand all of the configuration options that are available and select the options that will best suit your needs.

Your system must meet the following software and hardware requirements:

- 64-bit Windows operating system

- Microsoft Internet Information Services (IIS) 7 or higher
- Microsoft .NET Framework 4.0 or higher
- Minimum of 2.0 GB operational disk space

Detailed information about supported platforms and software configuration is available in the *Supported Platform Matrix*. (Click **View** to see the complete platform matrix for the release you are installing).

## Installing SBM

The following steps describe how to perform a complete installation of all the SBM components (including SBM Composer) on a single machine.

### To install SBM:

1. Launch the SBM suite installer executable .
2. The "Welcome to the Install Wizard for Serena Business Manager" message appears. Click **Next** to continue.
3. Accept the license agreement. Click **Next** to continue.
4. Provide the location in which to install SBM. Click **Next** to continue.
5. If either the **Microsoft SQL Native Client** or **Microsoft ODBC Driver 11 for SQL** are not detected on your machine, the installer provides you the option to install SQL Express. If you do not have a database system installed on your machine, select the option install SQL Express now. If you plan to restore the sample database in SQL Server or Oracle instead of SQL Express, clear the check box and click **Install** to begin the installation process.
6. Allow the install to complete, and then click **Configure** to launch SBM Configurator.

## Configuring SBM

The following steps describe how to configure your SBM installation after the installer is finished. SBM Configurator is initially launched in **wizard mode** immediately after the suite installer is finished. In **wizard mode**, you progress through the **General** tabs by clicking **Next**. Click **Back** to return to the previous tab. Once you finish **wizard mode**, SBM Configurator runs in **utility mode**.

### To configure SBM:

1. Launch SBM Configurator. The "Welcome to SBM Configurator" page appears.
2. On the Welcome page, select the **Use Configuration Settings database** option. Click **Next** to continue.
3. On the **Database Servers** tab, select the **Use sample database** check box. If you chose to install SQL Server Express, this check box is selected for you by default, and **SQL Server** appears in the **Database type** drop-down list.

- 
4. Enter the required server information and database credentials depending on the type of database you will use to host the sample database. For SQL Express, use the following default values:

Field Name	Value
ODBC Data source	SBM
Database type	SQL Server
Windows Authentication	Do not select
Host	Host name of your local machine
Instance	SBMSQLEXP
Port	1433
Database name	sample
User name	sa

In the **Database and connection credentials** section, select **Use default credentials** to create the database with the name "sample" and use the default user account (sa) and default password (Password123). Select **Use custom credentials** to enter a different name or user name and password if your DBMS uses different credentials.

Click **Import Sample Database** to import the database. A progress indicator appears while the import operation runs.

Click **Test connection** to confirm that you can connect to the database. If the sample database has not been imported yet, the test will fail. Do not test the connection until after the database has been imported. Click **Next** when the restore operation is finished.



**Tip:** For detailed instructions on importing the sample database in SQL Server or Oracle instead of SQL Express, click the help icon and follow the instructions in the SBM Configurator Help.

5. On the **Component Servers** tab, you typically define the distribution of the SBM components and configure port numbers for IIS and Tomcat. For evaluation purposes, every component will be installed on your local machine. Verify that the information is correct, and then click **Next** to continue.
6. On the **IIS Server** tab, select **Default Web Site** and click **Next**.
7. On the **Tomcat Server** tab, accept the default values and click **Next**.
8. On the **License Server** tab, select **Use Evaluation License**, and then click **Next** to continue.
9. On the **Authentication** tab, select the following authentication options:

- **Browser sessions** – Single Sign-On
- **Browser authentication** – SBM Login Form
- **Authenticate against** – Internal SBM Database
- **User session time-out** – Does not time out

These options provide a login page that enables you to log in using one of the sample user accounts listed in [Sample Login IDs \[page 10\]](#). Click **Next** to continue.

10. On the **Mail Services** tab, click **Next** to continue. After **wizard mode** is finished, you can set up mail servers to test the Notification Server and Mail Client.
11. On the **Common Services** tab, accept the default values and click **Next**.
12. The **Summary** tab provides help for the next steps in a production install. Because they do not apply to an evaluation installation, click **Finish**. Click **Yes** when you are prompted to stop the services.
13. Open the **Manage Services** tab and start the services that are listed if they are not started already. Continue to the next section to verify the installation.

## Verifying Installation

After you install and configure SBM, verify that everything is installed correctly by accessing each SBM component. If you have problems connecting to a component, restart IIS and SBM Tomcat. You can restart the services on the **Manage Services** tab in SBM Configurator.

## Serena Work Center and SBM User Workspace

1. To access Serena Work Center, use the following URL:

`http://serverName/workcenter`

The Serena Business Manager login page opens. Log in as **bill** (no password):



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This confirms that Serena Work Center is accessible and ready for use.

2. Navigate to the following URL:

To access the classic interface (SBM User Workspace), use the following URL:

`http://serverName/tmtrack/tmtrack.dll?`

The Serena Business Manager login page opens. Log in as **bill** (no password):

A screenshot of the Serena Business Manager login page. The page has a light beige background. At the top, it says 'Please Sign In' in blue, followed by 'To access your applications.' Below that, there are two input fields: 'User Name:' with 'Bill' entered, and 'Password:' which is empty. At the bottom, there is a 'Log On' button.

This confirms that SBM User Workspace is accessible and ready for use.

## Application Repository

1. To access Application Repository, navigate to the following URL:

`http://serverName:8085/mashupmgr`

The Application Repository login page opens. Log in as **Admin** (no password):

A screenshot of the Application Repository login page. The page has a light gray background. At the top, it says 'Please Sign In' in gray, followed by 'Application Repository' with a small gear icon. Below that, there are two input fields: 'User Name' with 'Admin' entered, and 'Password' which is empty. There is a 'Remember Me' checkbox with a checked mark. At the bottom right, there is a blue 'Sign In' button.

## SBM Application Administrator

1. Open Serena Work Center or SBM User Workspace:

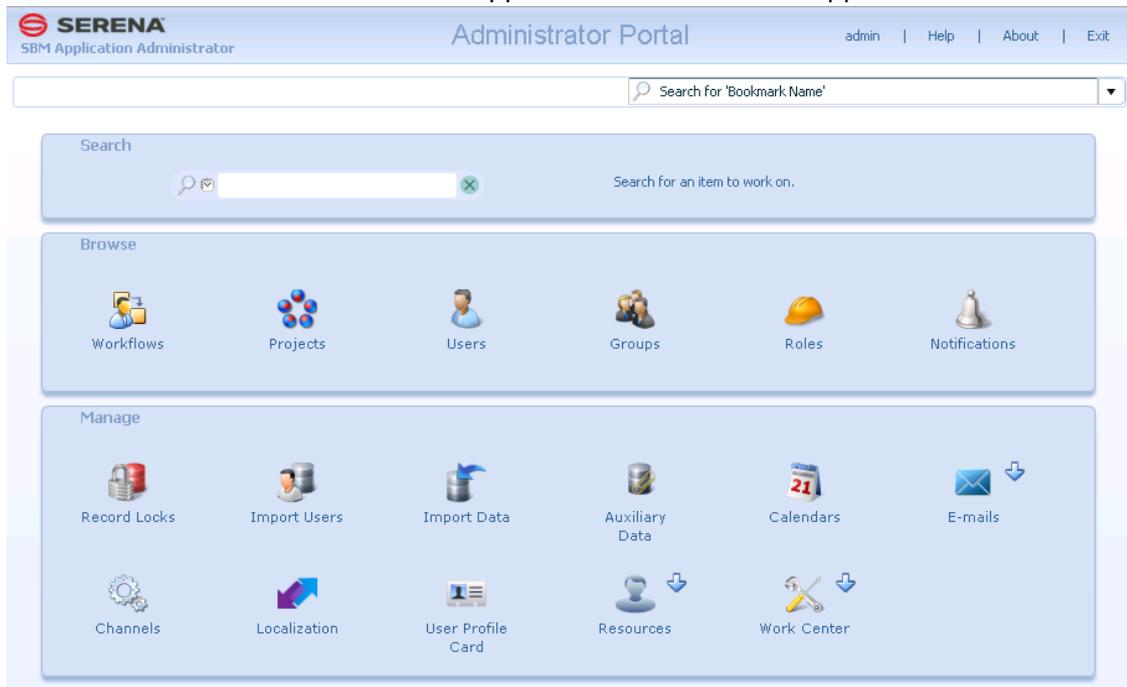
`http://serverName/workcenter`

`http://serverName/tmtrack/tmtrack.dll?`

Log in as an administrator (**Bill** or **Admin**).

2. Launch SBM Application Administrator from within either interface:
  - In Serena Work Center, click the user icon, and then select Application Administrator.
  - In SBM User Workspace, click the **Administrator** icon .

The **Administrator Portal** in SBM Application Administrator appears:



## SBM Composer

1. Launch SBM Composer from the Windows Start menu.
2. If you are prompted to connect, click **Connect Now**.  
Otherwise, click **File**, and then click **Composer Options**.
3. Under **Repository**, click **Connection**, and then select **Work online**. Enter your **Machine Name** (`localhost`) and **Port** (`8085`).
4. Enter `admin` in the **User Name** field. Leave the **Password** field blank.
5. Click the **Test Connection** button. If the connection succeeds, you are ready to start developing and deploying applications.

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## Installing SBM Composer

Follow these instructions to install SBM Composer. After it is installed, you can access links to tutorials and other useful information to help get you started with your evaluation.

If you plan to install SBM in its entirety, skip this section and go to [Installing and Configuring SBM \[page 11\]](#).

1. Launch the client executable. The installer is available on the installation DVD and as a download. To launch it from the HTML front-end on the DVD, click the **Install SBM Composer** link.
2. Click **Next** on the **Welcome** dialog box.
3. Accept the license agreement and click **Next**.
4. Choose the location path to install the client and click **Next**.
5. Choose whether to create a desktop shortcut and click **Install** on the summary dialog box to install SBM Composer.

When the installer finishes, SBM Composer is installed and links are added to your Windows **Start** menu.

## Designer Tasks

The designer is responsible for creating and modifying the workflow, roles, forms, and data within a process app. The process app is a collection of the applications, orchestrations, and accompanying data such as primary and auxiliary tables. Designers use SBM Composer to make the changes and then deploy their changes to make them active.

The following topics describe the SBM Composer interface and how you can download a prebuilt process app directly from SBM Composer.



**Note:** Use **admin** and no password to configure SBM Composer to connect to the sample repository.

- [SBM Composer \[page 17\]](#)
- [Navigating SBM Composer \[page 18\]](#)
- [Getting Started With Sample Process Apps \[page 20\]](#)

## SBM Composer

SBM Composer is the visual design component of Serena Business Manager (SBM). Use SBM Composer to design the structure of a process app, which can contain applications and orchestrations.

Applications and orchestrations contain workflows that coordinate the flow of information through business processes. Application workflows coordinate the work of people; orchestrations coordinate Web service-enabled systems. In SBM Composer, design tasks include:

- Defining workflows that control the flow of data

- Creating roles that control the actions users can perform and the information they can access
- Designing custom forms that present "view" and "update" pages to your users
- Defining the events and workflows used by orchestrations

After process apps are designed, they are deployed to a runtime environment, where the processes are run by two engines: the Application Engine runs applications workflows and the Orchestration Engine runs orchestration workflows.

SBM Composer provides two mechanisms to deploy a design to a runtime environment:

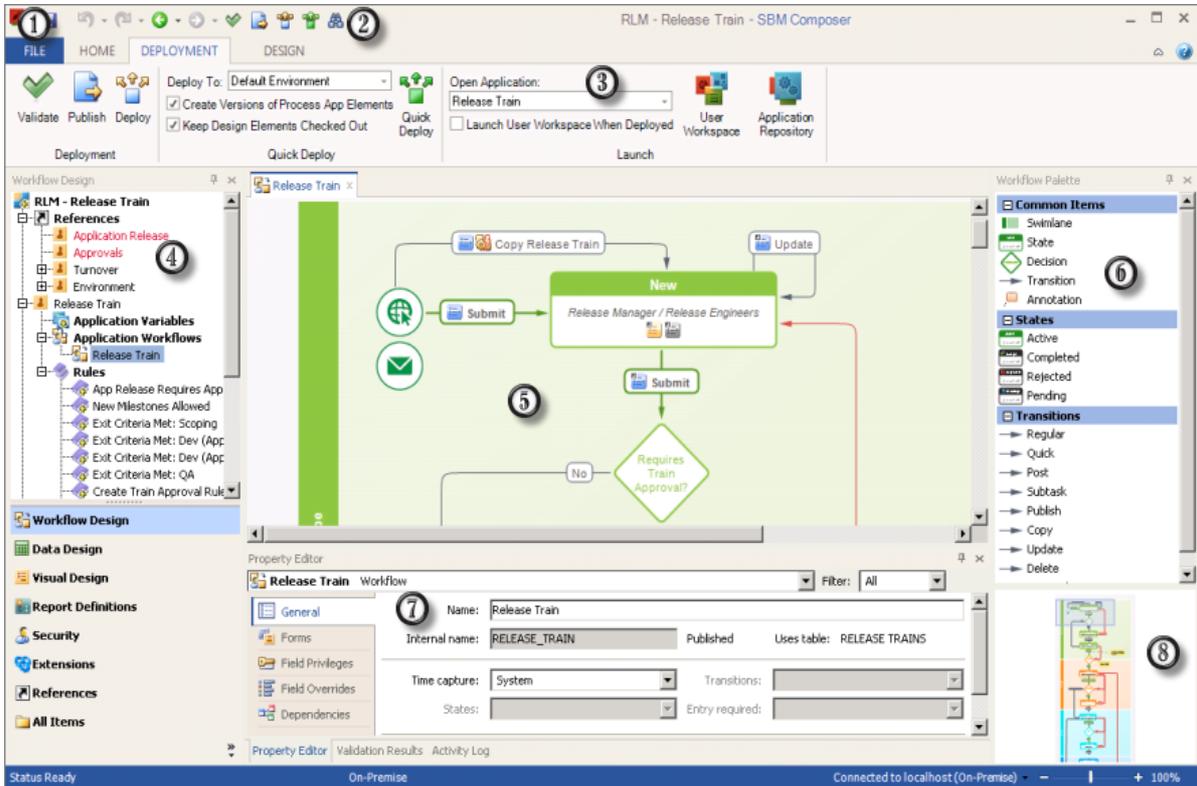
- You can publish a process app to the SBM Application Repository, from which an administrator can deploy the process app to the target environment.
- When administrative control is not needed, you can use the quick deploy command in SBM Composer to directly deploy a process app through the Application Repository to a specified environment.

Once a process app is deployed, use the SBM Application Administrator to perform configuration tasks, such as creating projects that store process items, assigning users to roles, and creating notifications. Once configuration tasks are complete, the process app is ready for users.

## Navigating SBM Composer

SBM Composer is organized to help you quickly design process apps. Use the App Explorer to open design elements in a visual editor. The quick access toolbar makes commonly used commands readily available, while the Ribbon displays tabs with options and commands that vary according to the task you are performing. Right-click (context) menus provide access to commands as you need them.

The following figure shows SBM Composer as it looks with a checked-out process app open. Use the legend and reference links to learn about interface elements identified in the figure.



### 1. File Options

Use **File** options to manage process app files, set options, and exit SBM Composer. Depending on your theme settings, these options are available in the upper left corner from the **File** tab, the Composer Start button, or a drop-down menu.

### 2. Quick Access Tool Bar

Contains commonly used commands, such as undo, redo, save, and validate.

### 3. Ribbon

Provides a central location for the commands you use to perform design tasks. The Ribbon contains commands appropriate to the design element you are editing and is organized into task-specific tabs:

- The **Home** tab is selected when SBM Composer is first opened. It contains common commands that are available in all of the editors.
- The **Deployment** tab is always visible. It contains common commands related to validation, publishing, and deployment.
- The **Design** tab is visible when you open a workflow or form. Its contents vary depending on the design element being edited.
- The **Appearance** tab is visible when you customize the appearance of an annotation or a swimlane.
- The **Script** tab appears is visible when you add or edit a script.



**Tip:** Use the arrow at the top right corner to collapse and expand the Ribbon if you need more viewable space in the main window.

#### 4. **App Explorer**

Navigate design elements in an open process app.

#### 5. **Design Editor**

Select elements from the App Explorer to open them in the Editor, which is the main work area.

#### 6. **Palette**

Contains design artifacts related to the element in the Editor. You can drag and drop design artifacts into the editor.

#### 7. **Property Editor**

Set properties for the selected design element.

#### 8. **Zoom Preview**

Drag the rectangle to move to a different part of the form or workflow. Use the slider bar below the zoom preview to change the size of the rectangle, so that more or less of the form or workflow is visible in the editor pane.

## Getting Started With Sample Process Apps

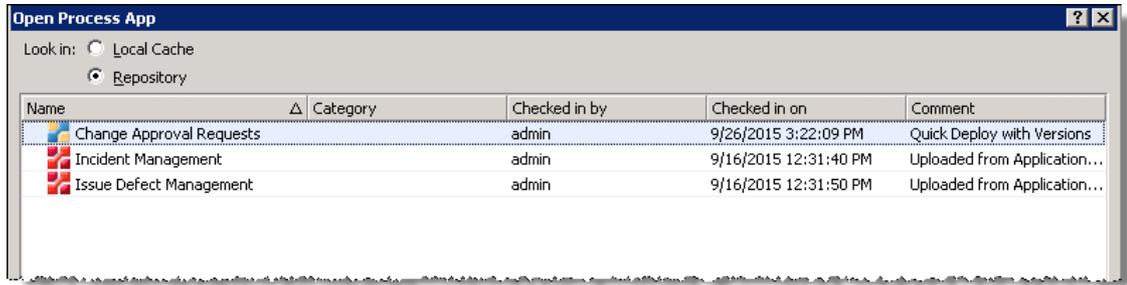


**Note:** You must install SBM in its entirety to publish and deploy the sample process apps.

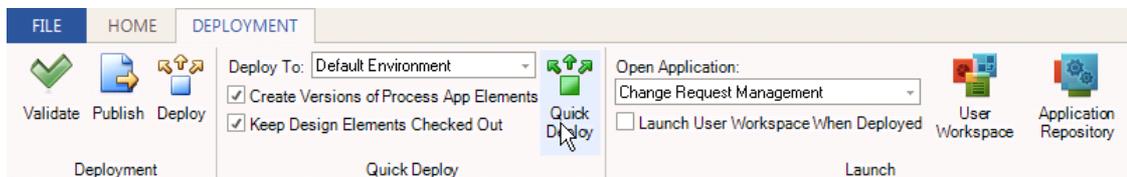
SBM provides a number of sample process apps that you can use as-is or customize to meet your needs. You modify sample process apps in SBM Composer.

### To modify the sample process apps:

1. In SBM Composer, from the **File** menu, select **Open**.
2. Select the **Repository** option, and then select the process app you want to modify.



3. Click **Open**. The process app opens.
4. You can explore and modify the process app design elements as needed. For example:
  - Select a workflow located under the **Application Workflows** heading in the left pane, which is referred to as App Explorer. The workflow opens in the application workflow editor, enabling you to see the process and its states and transitions.
  - Select a form under the **Forms** heading in App Explorer. Depending on the process app you are exploring, you may see state and transition forms. State forms represent a "view" form for items; transition forms represent an editable form.
  - Select the first table under the **Tables** heading in App Explorer. The first table is always the primary table for the process app. This table contains the fields used to collect data for your process app. Many field types are available, including *Text*, *Date/Time*, *Single Selection*, and *User* field types.
5. After you have modified the process app design elements, you can view your changes in Work Center by selecting the **Deployment** tab, and then clicking the **Quick Deploy** icon.



6. When you are prompted to deploy the process app, click **Yes**. This action checks in the process app to the repository and deploys the process app to the SBM Server.
7. Log in to Work Center. If you are using the sample database, you can log in as "admin" with no password.
8. Click the **Change Requests** icon. You can explore the process app in the runtime environment as needed. For example:
  - Submit new items into the process app. After you click the **+New** button, you can select the **Change Approval Request Project**. When you do, the **Submit** form opens, enabling you to enter pertinent information for each item.
  - Search for items you submit in the process app by clicking the  icon. When the Search page opens, click the **Search** button to view items.

- Create reports that return various views of the data in your system. You can choose from Listing, Trend, and Distribution reports, as well as more advanced report types.



**Tip:** Refer to the online help in Work Center to learn more about these features.

## Administrator Tasks

Administrative tasks include creating users, assigning privileges, and creating new projects. Administrators use three main interfaces: SBM Application Administrator, SBM Application Repository, and SBM System Administrator.

- **SBM Application Administrator**

Used to create users, create projects, and to assign users to roles.

- **SBM Application Repository**

Used to import solutions, deploy and promote process apps, and manage privileges associated with publishing and deploying process apps.

- **SBM System Administrator**

Used for database actions such as creating a new database or putting files into the database.

The following topics describe the different interfaces:

- [SBM Application Repository \[page 22\]](#)
- [SBM Application Administrator \[page 25\]](#)
- [SBM System Administrator \[page 32\]](#)

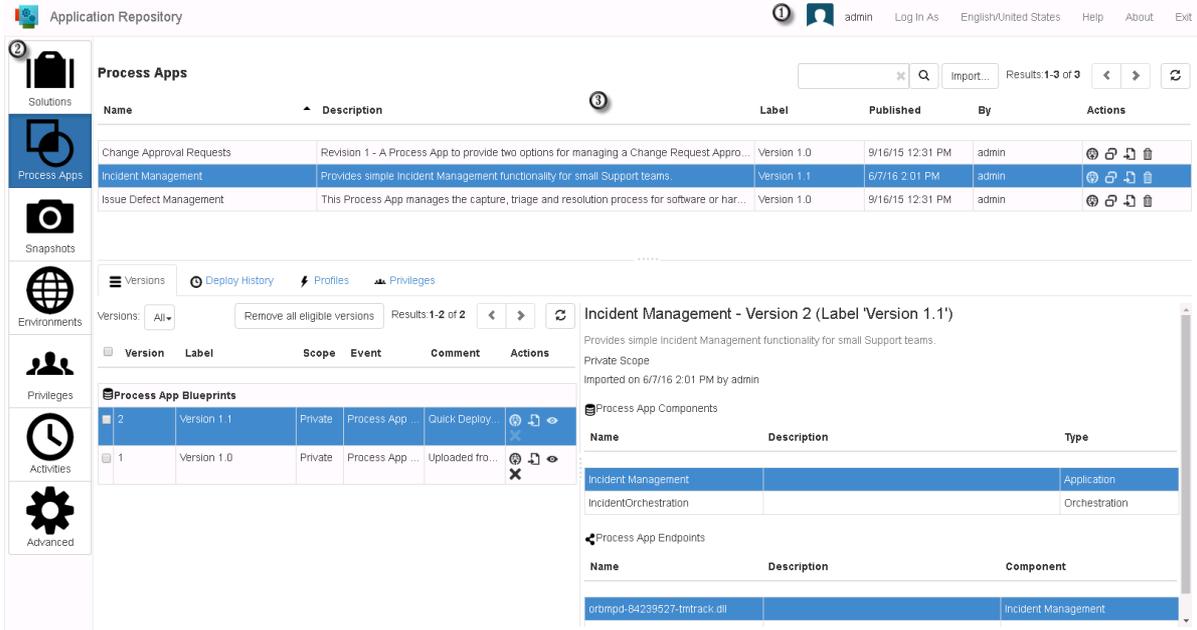
## SBM Application Repository

Application Repository is the interface that enables administrators to import solutions, deploy and promote process apps, manage environments, and assign repository privileges.

If you are using the sample database, you can log in as `Admin` with no password. In order to log in to SBM Application Repository, you must use an account like Admin, which has the **Remote Administration** privilege.

# Parts of the Interface

SBM Application Repository is divided into these main parts:



1. **Toolbar** – The toolbar provides commands that pertain to all of SBM Application Repository.  
Refer to [About the Toolbar \[page 23\]](#).
2. **Navigation pane** – The navigation pane provides quick access to the entities, activities, and logs that you work with in SBM Application Repository.  
Refer to [About the Navigation Pane \[page 24\]](#).
3. **Content pane** – The content pane displays details for the current selection in the navigation pane.  
Refer to [About the Content Pane \[page 25\]](#).

## About the Toolbar

The toolbar contains the following:

Toolbar Item	Description
User ID and Avatar	Displays the ID and avatar of the user who is currently logged in. The avatar that is displayed is the same avatar you specify in Serena Work Center.

Toolbar Item	Description
Log In As	<p>Enables you to log in as another user (without knowing that user's password) for troubleshooting purposes. Any actions that you perform while logged in as another user are logged under your name <i>on behalf of</i> the other user. While logged in as the other user, you have the set of privileges assigned to that user.</p> <p> <b>Note:</b> You must have the <b>Logon as Another User</b> privilege, which is located on the <b>System</b> privileges tab in SBM Application Administrator before you can log in as another user.</p>
Locale	Displays the current language and country. Click the link to select a different locale.
Help	Link to the SBM Application Repository help on the <a href="#">Documentation Center</a> .
About	Provides additional information about SBM Application Repository, including the build and version numbers and system configuration.
Exit	Exits SBM Application Repository.

## About the Navigation Pane

The navigation pane contains the following tabs:

1. **Solutions**

Displays solution files, which contain a bundle of process apps and snapshot files.

2. **Process Apps**

Displays the list of process apps that have been published and that you have the privileges to view.

3. **Snapshots**

Displays the list of process app snapshots that have been created, and enables you to load a new snapshot from a file or create a new snapshot.

4. **Environments**

Displays the list of environments.

5. **Privileges**

Displays the privileges controlling the deployment actions that administrators and designers can perform in SBM Composer and SBM Application Repository.

6. **Activities**

Displays the status of Application Repository activities, including process app deployments and snapshot promotions.

7. **Advanced**

Displays audit history, performance statistics, and logging information for SBM Application Repository.

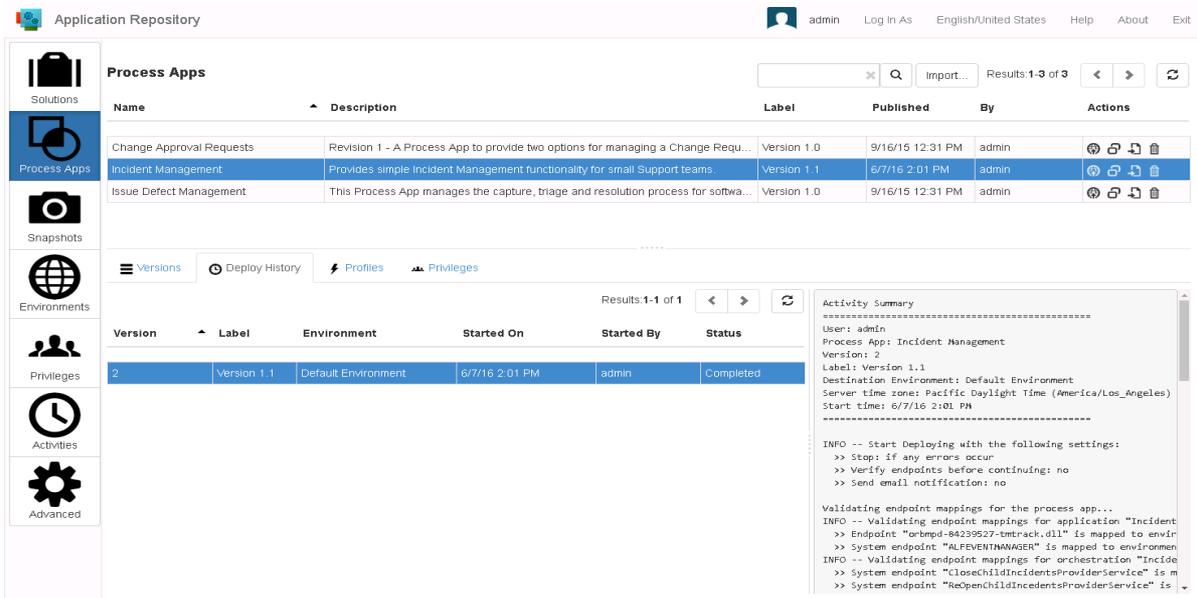
## About the Content Pane

The top of the content pane typically displays a list of items that correspond to your current selection in the navigation pane. The **Actions** column provides the available actions that you can perform against an item in the list.



Label	Published	By	Actions
Version 1.0	9/16/15 12:31 PM	admin	[Icons]
Version 1.1	6/7/16 2:01 PM	admin	[Icons]
Version 1.0	9/16/15 12:31 PM	admin	[Icons]

Below the list, a set of tabs provides detailed information and settings that you can modify for the selected list item. For example, if you select **Process Apps** in the navigation pane, a list of process apps appears at the top of the content pane. In the tabs below, you can access **Versions**, **Deploy History**, **Profiles**, and **Privileges** for the selected process app.



The screenshot shows the 'Application Repository' interface. The 'Process Apps' section is active, displaying a list of process apps. The 'Incident Management' app is selected, and its details are shown in the main pane. The 'Versions' tab is active, showing a table of versions for the selected app.

Name	Description	Label	Published	By	Actions
Change Approval Requests	Revision 1 - A Process App to provide two options for managing a Change Requ...	Version 1.0	9/16/15 12:31 PM	admin	[Icons]
Incident Management	Provides simple Incident Management functionality for small Support teams.	Version 1.1	6/7/16 2:01 PM	admin	[Icons]
Issue Defect Management	This Process App manages the capture, triage and resolution process for softwa...	Version 1.0	9/16/15 12:31 PM	admin	[Icons]

Version	Label	Environment	Started On	Started By	Status
2	Version 1.1	Default Environment	6/7/16 2:01 PM	admin	Completed

```
Activity Summary
-----
User: admin
Process App: Incident Management
Version: 2
Label: Version 1.1
Destination Environment: Default Environment
Server time zone: Pacific Daylight Time (America/Los_Angeles)
Start time: 6/7/16 2:01 PM
-----
INFO -- Start Deploying with the following settings:
>> Stop: if any errors occur
>> Verify endpoints before continuing: no
>> Send email notification: no
-----
Validating endpoint mappings for the process app...
INFO -- Validating endpoint mappings for application "Incident
>> Endpoint "onmpd-84239537-ctrack.dll" is mapped to envir
>> System endpoint "ALFEVENTMANAGER" is mapped to environm
INFO -- Validating endpoint mappings for orchestration "Incide
>> System endpoint "CloseChildIncidentsProviderService" is m
>> System endpoint "ReOpenChildIncidentsProviderService" is
```

## SBM Application Administrator

SBM Application Administrator enables you to perform application configuration tasks—such as adding projects and assigning them to workflows, creating user accounts and assigning them to roles and groups, and creating notifications.

You can also use Application Administrator to import users, import data from spreadsheets, manage record locks, create business calendars, and manage items in auxiliary tables.



**Note:** Application Administrator requires the Adobe Flash Player. If the Flash Player is not installed or enabled for your browser, you are prompted to install or enable it when you open Application Administrator. If you are using Internet Explorer 11 or later, you must use Adobe Flash Player 13 or later.

## Administrative Concepts

Make sure that you understand the following administrative concepts before you use SBM Application Administrator.

### SBM Composer

SBM Composer is used to design applications, including workflows, states, transitions, forms, roles, and other process elements. Once deployed, these applications are configured using SBM Application Administrator.

### Applications

An application is a collection of elements that work together in an interactive process to solve a business requirement, such as managing work tasks or tracking customer support calls. An application is based on a single primary table and typically contains workflows, fields, forms, roles, projects, reports, and notifications. Applications are created in SBM Composer as part of a process app, which can contain multiple applications.

### Projects

Projects serve as storage bins for primary items, which follow a workflow. Projects are grouped by application.

Projects enable you to organize groups of primary items in a way that makes sense for your workflow. For example, you can create a project for each functional team working on a product or for each version of the product.

### Workflows

A workflow is a collection of states, transitions, and fields that define a process. Workflows are created in SBM Composer and deployed to your runtime environment. You can then assign projects to workflows. This two-fold system enables you to first define your processes, and then assign them to projects to track primary items at various levels. Several projects may use the same workflow.

### Roles

A role is a collection of application-related privileges. Users may have different roles in different projects, and a user can be assigned to multiple roles. Examples of the types of permissions associated with a role are the ability to view and update fields; the ability to perform specified actions on items, attachments, notes, and reports; and the ability to specify access to, or restriction from, certain transitions. Designers create roles in SBM Composer as part of an application.

### User Accounts

Each user has an account with characteristics such as a user login ID, password, and e-mail address. Each account has privileges associated with it that determine the

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information the user can access and functions the user can perform. Privileges are assigned to users as part of their group membership and role assignment.

## **Groups**

A group is a named collection of users who have the same privilege set. A group might be created for a particular project, for example, or for a division within the company. A user can be assigned to multiple groups.

The core privileges available for groups and roles are generally the same. However, groups contain additional privileges, such as system and administrative privileges that are not available with roles. Typically, complex process apps require a combination of roles with the additional privileges that groups provide.

## **Resources**

Resources enable you to manage resource team assignments, scheduling, job functions, and skills of employees in your organization. Resources can be based on SBM user accounts or for employees who do not have SBM accounts. This information can be used for assigning resource teams to plans in Serena Demand Center or for other planning purposes.

## **Notifications**

Notifications are generated when certain events occur in the system. For example, users can be sent e-mail notifications when an item is assigned to them. Notifications can also be used to execute scripts, call Web service functions, and automatically add and remove items from folders.

## **"Quick" Administrator Features**

When a new process app is deployed, certain features are automatically enabled. This eases the process of adding new applications.

"Quick" Administrator features include:

- A project is created for each application workflow. The project name is the workflow name, appended with the string "Project". If the workflow name includes "Workflow", it is replaced by "Project". If necessary, the whole name is truncated to 32 characters to comply with database constraints.
- The application workflow hierarchy becomes the project hierarchy.
- The person who deployed the process app can view and submit items into the application's projects and is automatically assigned all roles on these projects.
- A default set of notifications are automatically created.

## **Key Benefits**

- Eases the process of configuring applications.
- Allows for quick testing of applications as they are being developed.
- Provides a foundation for a more complex project hierarchy.

## Managed Administration

Depending on your product-access type and privileges, you may only be able to administer specific applications and application features, users, and groups. For details, refer to the "Managing Administrators" chapter in the *SBM Application Administrator Guide*.

## Administrative Locking

Application Administrator does not lock application elements with features, such as projects, roles, users, groups, and notifications.

If multiple administrators edit the same feature, such as a project, at the same time, and one administrator saves his or her changes, a pop-up opens for the next administrator who attempts to save changes. This administrator can select one of the following options:

- **Save My Changes**

Delete changes made by the first administrator and save your changes.

- **Get Data**

Delete your changes and update the page with the changes made by the first administrator.

- **Cancel**

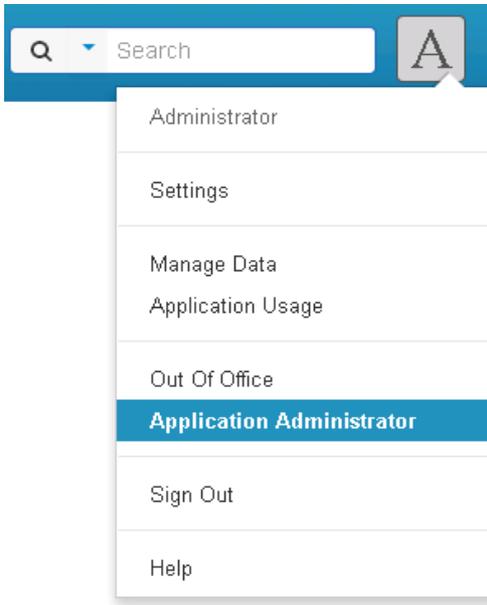
Cancel the save operation.

## Parts of the SBM Application Administrator Interface

### The Administrator Portal

The Application Administrator provides access to application configuration features and utilities.

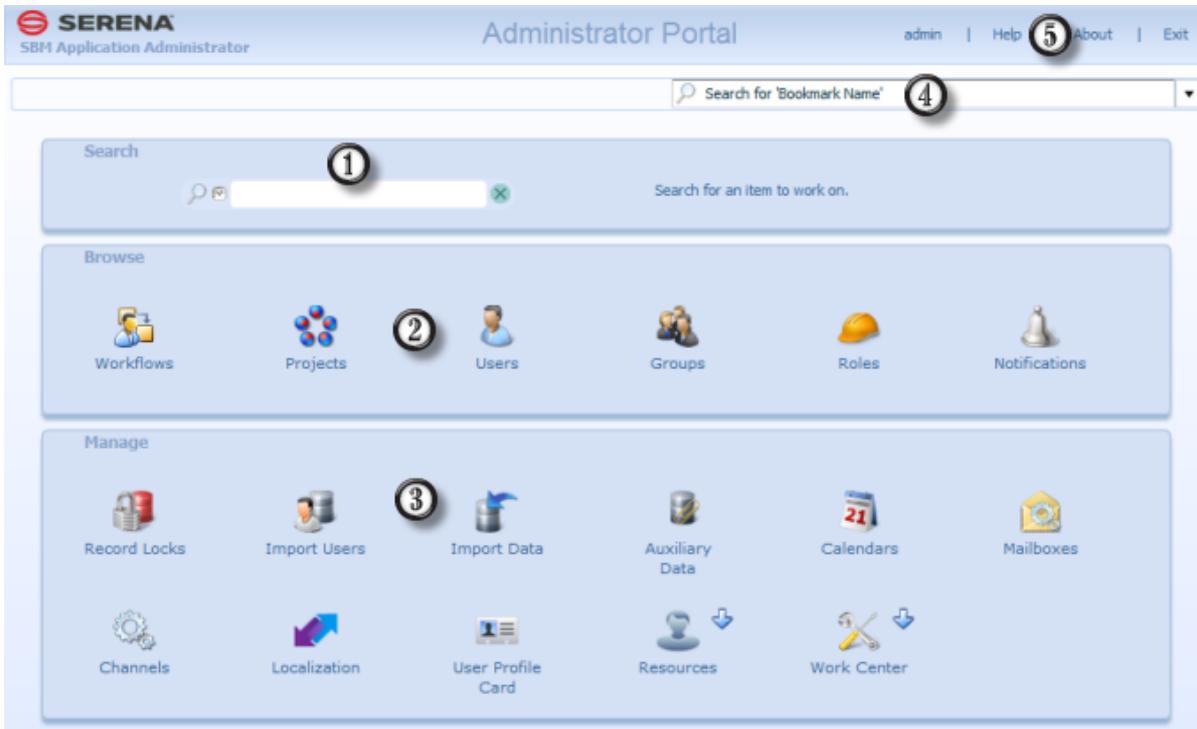
To open the Application Administrator from Serena Work Center, click the user icon in the upper right corner, and then select Application Administrator.



To open the Application Administrator from the SBM User Workspace, click the **Administrator** icon.



The **Administrator Portal** has the following parts:



## 1. Search

Search for users, groups, and projects by name. Select an item in the results list to open links to quick actions, such as **Edit User** (when a user is selected) or **Edit Project** (when a project is selected).

2. **Browse**

Click the icons to configure application elements.

3. **Manage**

Click the icons to open administrative utilities.

4. **Bookmarks**

Select or search for a bookmark in the list. Bookmarks enable you to quickly access to certain features, such as users, groups, roles, projects, and notifications.

5. **Toolbar**

Provides the following links and information:

- **User Name**

Indicates the user logged into the system.

- **Help**

Click to open online help for the page you are viewing.

- **About**

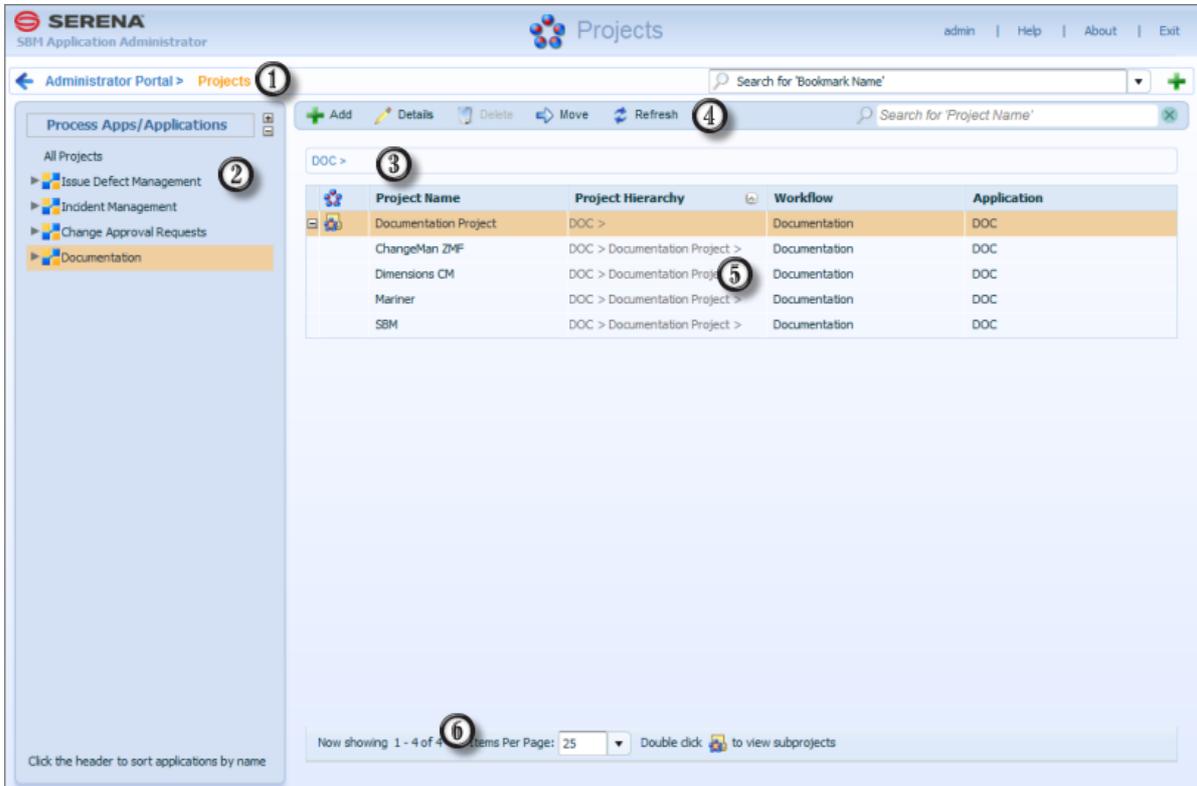
Click to view version and configuration information.

- **Exit**

Click to log out of Application Administrator.

## Feature Views

Views refer to the main pages for specific areas of the interface, such as the **Projects** view or the **Notifications** view. The following figure shows an example of a view and explains the terminology used to describe the most common parts of the interface.



## 1. Navigation Links

Use this link to return to the **Administrator portal**. If you have drilled down into a specific feature, such as a user account, you can also use this link to return to the **Users** view, for example. The orange text indicates the page you are currently viewing.

## 2. Navigation Pane

Refers to the left pane, which is used to navigate to specific feature areas. Some features, such as projects and notifications, require you to navigate the applications list. Other features, such as users and groups, provide tabs that open content pages.

## 3. Bread Crumbs

Use bread crumbs to return to the **Administrator Portal**. If you have drilled down into a specific feature, such as a user account, you can also use this link to return to the **Users** view, for example.

## 4. Toolbar

All content pages include a toolbar containing buttons and links that enable you to add, edit, delete items and more. A **Search** box is also available on the toolbar for most features. This search mechanism applies to the feature you are working with. For example, from the **Users** view, you can search for users by name or login ID.

## 5. Content Pages

Refers to pages that enable you to view and configure various features. Most of your work will be done in these pages, which may be divided into various panes.

## 6. Pagination

Use **Items Per Page** to set the number of items to display on pages that contain long data lists, such as projects, fields, users, and groups. You can use one of the provided amounts or specify your own number under 1,000 items. Use the navigation arrows to move through multiple pages.

## SBM System Administrator

SBM System Administrator provides SBM Application Engine administration capabilities, such as running database utilities and configuring system settings. The tasks administrators can perform depend on their administrative privilege set and how they are connected to the database. All options are available when connected to SBM System Administrator using ODBC; more limited capability is available when connected to SBM System Administrator remotely. Privileges can control a remote administrator's access, however.

Most application configuration tasks are performed in SBM Application Administrator. These tasks include creating projects and notifications, managing user and group accounts, and assigning users and groups to roles.



**Note:** When you create a new SBM database using the **Create Database Wizard**, you must establish an account for your primary system administrator. Typically, this user is someone who has ODBC access to SBM System Administrator and can fully administer all aspects of your system. After you run the wizard, you should log in to SBM Application Administrator and grant additional privileges to this user and create accounts for other administrators as needed. For guidance on managing different types of administrators, refer to the *SBM Application Administrator Guide*.

## End User Tasks

The SBM end user creates, tracks, and reports on issues. The end user accesses SBM using Serena Work Center, the modern user interface, or SBM User Workspace, the classic user interface.

The following topics describe Work Center and demonstrate some basic tasks using the prepopulated information in the sample database, such as creating or submitting new items, transitioning items, and searching for existing items. For details on using SBM User Workspace, refer to the *SBM User's Guide*.

- [Serena Work Center \[page 32\]](#)
- [Navigating Work Center \[page 33\]](#)
- [Viewing Reports \[page 35\]](#)
- [Searching for Items \[page 35\]](#)
- [Creating and Transitioning Items through a Workflow \[page 36\]](#)

## Serena Work Center

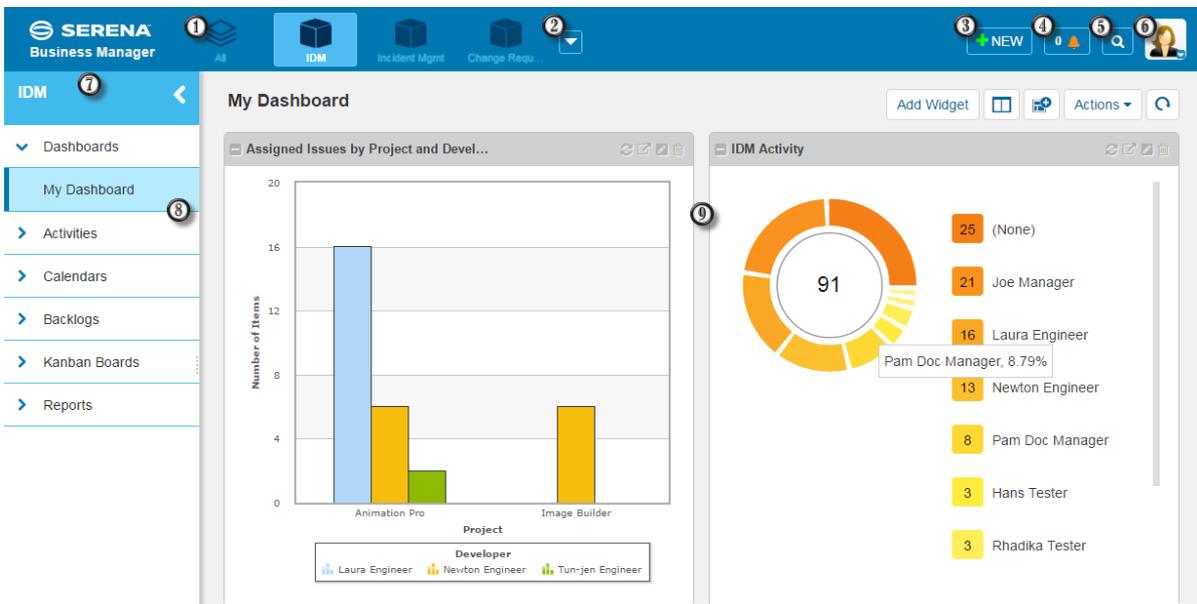
Serena Work Center brings the power of all of your SBM-powered solutions and applications to a single portal.

You can:

- Use views to access information in a variety of formats and application contexts. Four types of views are available:
  - Dashboard
  - Activity
  - Calendar
  - Backlog
- Use the Report Center to run and manage reports for specific applications or application groups.
- Submit new work items into projects assigned to any application you can access. You can choose to limit the scope of projects to your preferred projects or to the selected application or application group.
- Search for items in all applications, in a selected application, or in your preferred projects.
- Customize navigation menus for each application context.
- Browse notifications that reflect changes in the system.

## Navigating Work Center

Use the legend below the figure to learn about the different parts of Work Center.



### 1. All

Click to work with views and reports in a global context.



**Note:** If this icon is not available, your administrator has disabled the **All** context.

## 2. **Applications/Application Groups**

Click the **Down** arrow to pin applications and application groups to the toolbar. Once an application is pinned, click the associated icon to work with application-specific views and reports.

## 3. **Submit New Work Items**

Click to submit a new work item into a selected project.

## 4. **Notifications View**

Click to view notifications based on your subscriptions.

## 5. **Search**

Search for work items and reports in all applications or in the selected application.

## 6. **Settings Menu**

Click the user icon to:

- Change **Settings** in your user profile.
- Search for and work with auxiliary items via the **Manage Data** link.
- Run an **Application Usage** report (available for users with administrative access only).
- Set up an **Out of Office** period to delegate items to other users.
- Launch **Application Administrator** (for users with administrative access only).
- Log out of Work Center.
- Launch the **Quick Tour** or view online help.

Your user privileges determine which menu options are available.

## 7. **Side Menu**

When **All** is selected, the side menu provides access to global views. When a pinned application or application group is selected, the side menu provides access to application-specific views and reports.

You can resize the navigation pane horizontally or collapse the side menu by clicking the arrow icon.

## 8. **Views and Reports**

Click a view to create, modify or delete views of that type. Click **Reports** to find, manage, and schedule reports in the current application context.

## 9. **Content Pane**

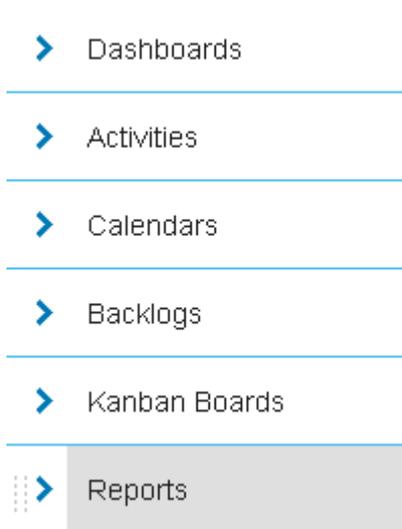
Use this area to view and manage work item data. The content in this pane depends on the selected view, search results, etc.

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# Viewing Reports

## To view a report in Work Center:

1. In the **Address Bar** of your browser, type the Work Center URL. An example of the URL is `http://serverName/workcenter`
2. Log in as the manager **Joe** with no password.  
Joe's dashboard appears. A 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.
3. You can view or create other reports by clicking **Reports** in the side menu.



Refer to the online help found in Work Center for more information on finding and creating reports.

## Searching for Items

SBM allows you to search for items using a variety of criteria such as item ID, keywords, and submitter. **Search** is usually used to quickly find one item, while **Reports** are used to view multiple items that meet particular criteria.

### To search for an item:

1. In the **Address Bar** of your browser, type the Work Center URL. An example of the URL is `http://serverName/workcenter`
2. Log in as the manager **Joe** with no password.
3. Click the Search (  ) icon located on the Work Center toolbar. The search page opens, as shown in the following figure.



4. In the **Search** box, enter `zoom tool` for the keyword and click the Search icon.
5. In the search results, you should see the item **ENH000079 Zoom tool needs more options** at the top. Click on the Item Id to open the item.

Relevance ▾ Expand All Results: 1 - 5 of 5 < >

ENH000079 Zoom tool needs more options  
 The zoom tool needs to have more options - the increments of 20 do not allow users to zoom in nicely.  
**Relevance: 100%** Project: Animation Pro Item State: Fixing Issue Submitted by: Chris Tester on 02/12/2009 08:38:35 AM

BUG000106 zoom feature is broken  
 You can zoom out, but when trying to zoom back in, you can never get smaller than the original size. If you zoom in before zooming out, the image will get smaller than +  
**Relevance: 2%** Project: Image Builder Item State: Fixing Issue Submitted by: Rhadika Tester on 02/13/2009 02:55:21 PM

BUG000069 Circle tool is not working right  
 The tool to create circles is not creating perfect circles, instead elliptical shapes are being drawn  
**Relevance: 1%** Project: Image Builder Item State: Evaluating Issue Submitted by: Chris Tester on 02/12/2009 08:26:26 AM

BUG000062 Line tool not working right  
 The line tool does not seem to be ending at the point where you let go of the mouse button. There seems to be a slight delay, so it ends a few seconds after you have let +  
**Relevance: 1%** Project: Image Builder Item State: Evaluating Issue Submitted by: Rhadika Tester on 02/10/2009 11:25:33 AM

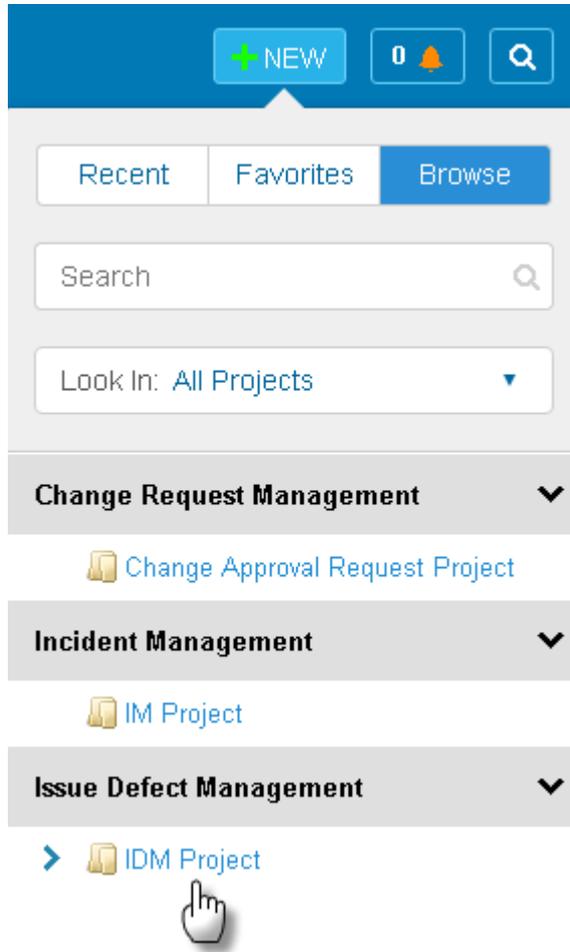
Refer to the online help found in the Work Center for more information on finding and creating reports.

## Creating and Transitioning Items through a Workflow

Creating a new item in SBM is called *submitting* a new item. Transitioning an item refers to moving an item to a new state in the workflow. States track the current status of the item. States may include *New*, *In Progress*, and *Completed*.

**To create an item and move the item through the IDM workflow:**

1. In the **Address Bar** of your browser, type the Work Center URL. An example of the URL is `http://serverName/workcenter`
2. Log in as the manager **Joe** with no password.
3. Submit an issue into the IDM application:
  - a. Click **+New**.
  - b. Select **IDM Project**.



- c. Complete the form for creating a new issue by entering a **Title** and selecting **Joe Manager** as the Team Lead.



**Tip:** You can click the magnifying glass icon to look for similar issues before actually submitting the issue. The search is performed based on the words in the title of the issue. The search uses these words and searches for these keywords in the searchable fields of existing items. The searchable fields have the **Include Field in Keyword Searches** option selected in the table properties in SBM Composer. For this application, the default fields with this option are Description, Item ID, Status Log, Steps to Reproduce, and Title.

4. The issue is created and moved to the Evaluating Issue state. The Team Lead is the primary owner, and the entire development team is the secondary owner. This means that the Team Lead can either assign issues to specific developers, or developers can assign issues to themselves.
5. As you view the form, you can see an example of a Web page widget, which enables you to embed a Web site into your form. Expand the **Wiki** section, and the Wikipedia Web site loads.
6. To allow work on the issue to start, click the **Fix** button.

Other transitions include:

- **Defer** – Moves the issue out of the active queue. Only Team Leads can defer an issue in this state.
  - **Need More Info** – Requests more information from the submitter.
  - **Close** – Moves the issue to the Resolved state, where it becomes inactive.
7. Complete the Fix form, selecting the priority, severity, Developer (**Laura Engineer**) and Tester (**Chris Tester**). The issue then moves to the Fixing Issue state and Laura becomes the owner.



**Tip:** You see the current state of the issue in the Action History section of the issue.

8. To send the issue to QA, click the **Fix Complete** button and select the resolution. You can add information to the *Description* and *Status Log* to allow others to understand the issue.



**Tip:** You could perform this task as Laura by signing out and logging in as **Laura** (no password).

Other transitions include:

- **Request Review** – Assigns the issue to another developer for peer review. The developer can decide whether to have a peer review based on the nature of the code change; not every issue must go through a peer review.
  - **Delegate** – Assigns the issue to another developer for fixing.
  - **Copy** – Creates another issue based on the values of the first issue. This can be used if you need to duplicate the issue into another project line. The original item is shown on the *Attachments* tab.
  - **Return** – Moves the issue back to the Evaluating Issue state, where the team lead is owner. The issue can be returned by the developer for a variety of reasons, such as the issue is not in his area of expertise or the issue needs more information for him to solve.
9. To pass the issue, click the **Pass** button on the Testing Issue form. The issue is moved to the Resolved state, where it becomes inactive.



**Note:** If you had logged in as Laura Engineer, you will need to log in as the tester that you selected, such as **Chris** (no password). If you are acting as Joe Manager, you will be able to perform the transition since you have managerial privileges.

Other transitions include:

- **Fail** – Reassigns the issue to the developer who originally worked on it and increments the **QA Reject Count** field.
- **Delegate** – Assigns the issue to another QA tester for testing.

This completes the item moving through the workflow. You can see the workflow of an item at anytime by clicking the  icon within the item.