

Launch of Serena's SharePoint Workflow Solution

1. Overview

Serena controls roughly 20% of the market world wide in the Application Lifecycle Management (ALM) space, mainly at the top end of the market where integration across many different platforms is a compelling requirement for managing enterprise processes.

Large government departments and corporations are customers for this technology, with some having up to 20,000 users globally participating in managing integrated processes for customer management, IT change control and release management.

Serena's Workflow and Microsoft's SharePoint technology provides a completely out of the box collaborative management solution enabling enterprises to quickly and cost-effectively develop systems to support processes for a fraction of the cost of customised solutions. Implementation is measured in "days and weeks" rather than "months or sometimes years" using conventional approaches.

With the release of SharePoint 2010, documents stored in native MS Office formats (e.g. Word, Excel, PowerPoint, or Visio) will be able to be opened and edited within a thin client browser session where MS Office is not loaded on the client PC.

2. Serena Business Mashups

The "Mashup" in SBM does not refer to the commonly understood term "Mashup" in the IT environment. This common use of the term refers merely to a data or application screen mashup where data or screen layouts are mashed to produce a composite or mashed up presentation.

SBM is a substantially more sophisticated concept involving the ability to combine disparate applications into integrated work processes and provide end users with the ability to enforce business rules over how data is exchanged between applications.



The power of the underlying technology behind the Serena SBM is its ability to create enterprise wide business processes by binding together control or activities spanning several business divisions and the applications they use. The product enables enterprises to integrate these separate users and applications across these different organisational units or functions into a single workflow representing the entire end to end process.

To accomplish this SBM has been developed as an “Out of the Box” development platform that handles backend database and application authentication, synchronous or asynchronous messaging, and BPEL compliant workflow integration.

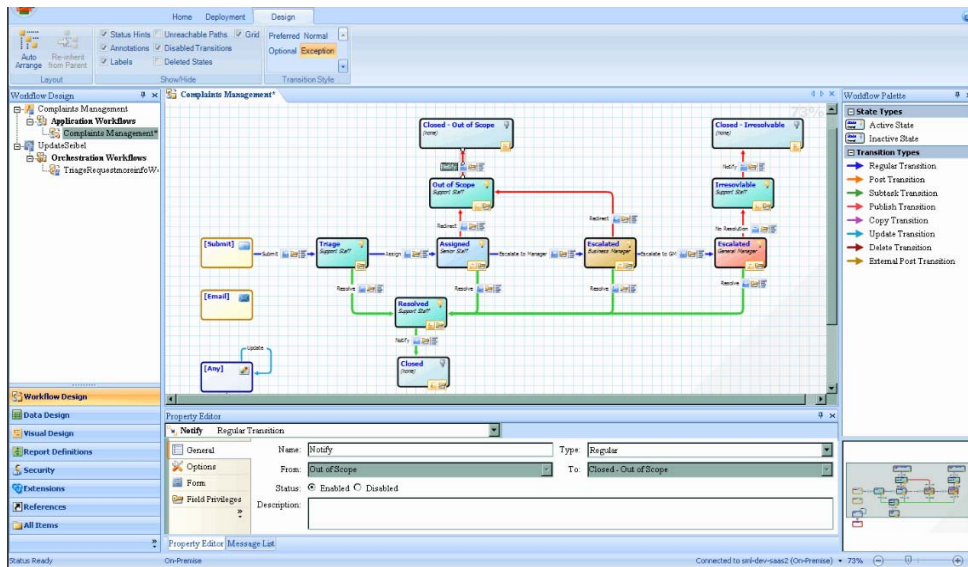


Figure 1 – SBM Workflow View

Figure 1 above shows the Workflow view of a typical process for a large organisation. These workflows can be easily modified or in future releases of Microsoft Visio 2010, Visio Workflows will be able to be imported directly and then linked to data and process integrations in order to publish an executable work process in a matter of hours.

Of course the product has capabilities to define form views which can incorporate existing screens from existing applications. While other applications also permit this capability, SBM allows the designer to manage the workflow context within which data is entered into the forms screens.

So for example some fields will not be able to be populated until the workflow reaches a particular state, some options may not be available for particular states, or users may not be able to undertake some functions based on insufficient privilege within a particular enterprise application. All this can be configured within the composer without any coding using drag and drop functionality.

Where workflows span multiple applications or divisions, the application enables designers to enforce business rules that will require the approval of relevant users at points where data is pulled from or pushed into other applications, providing an effective business process governance capability.

SBM can perform validation based on rules defined with the SBM workflow or business logic defined within the associated application¹.

Serena SBM has a wide range of out-of-the box tools for developing reports and dashboards to provide continuous monitoring and feedback about business processes. The product can be fully integrated with the .NET IDE enabling reporting add-ons to be developed using Microsoft's SQL Server Reporting Services.

Figure 2 shows a portal view with integrated dashboards about the activity within a typical process. These dashboards have full drilldown capabilities enabled so that users can quickly get access to the underlying business transactions even where these are stored within enterprise applications managed within the enterprise workflow.

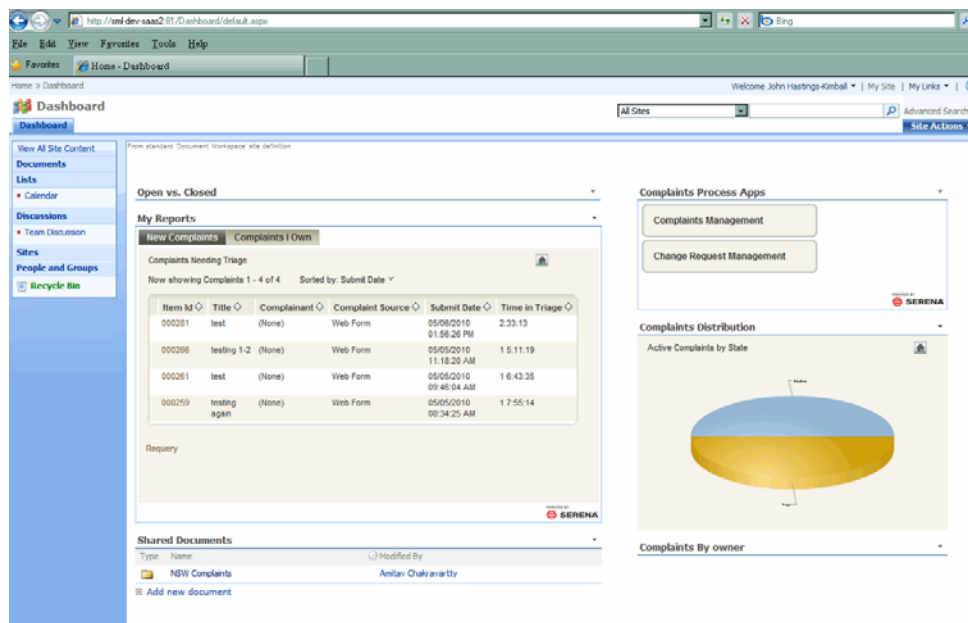


Figure 2 – Complaints Process Dashboard View

3. Share Point Integration

For organisations that use Microsoft for the desktop, SharePoint provides the added benefit of providing full desktop integration for applications developed on this platform.

Serena SBM has a rich integration with SharePoint and all documents and workflows can be accessed and displayed within SharePoint by any user within the organisation as long as they have the privilege to access the document or are parties to the complaint.

Only users who actually participate in the workflow need to have licences for the Serena SBM product but all other users, including the parties initiating the complaint, do not need a license to access the workflow details or the associated documents.

¹ Where the application supports Web Service integration or where pre-existing integrations exist for the product, for example, SAP or TRIM.

4. Share Point Governance using SBM

Serena SBM provides a governance integration that provides full visibility and workflow control over the creation of all Share Point sites deployed within the organisation and any files that are added to these sites. This provides a high level of control and visibility to IT by enforcing workflow over authorisation of these activities.

With the emerging popularity of SharePoint as an Intranet product that allows users to host a wide variety of content, the ability to manage this process with formal workflow is becoming a critical requirement for many organisations.

Figure 3 shows a typical screen a user or IT person would create to submit a request for a new SharePoint site or to add a new project within an existing site. Serena SBM has the integrations to manage the approvals workflow and then after they have been successfully completed automate the creation of the site. Figure 6 shows the completed workflows and the end result which is a single button that is presented to the project owner to create the new SharePoint site.

Submit Info: Project OnBoarding

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SharePoint
 New SharePoint Site
 Existing SharePoint Site

SERENA
 New SBM Project
 No SBM Project

Comments/Notes:

Item ID: (Auto)
State: (Auto)
Submitter: (Auto)
*** Project Manager:** Administrator

Cancel OK

Figure 3 –Workflow to manage creation of project using SharePoint

Without such workflow control over these activities then emails and forms are typically used to request IT personnel to complete these activities. This typically results in delays in site creation and unnecessary phone calls by end users following up their requests for a new site. Serena SBM provides full visibility of this process to all users who will know precisely the state of each request.

Any subsequent follow-up will be captured within the SBM application, communicated to the personnel currently handling the current activity and retained as history. The product has full capabilities to set escalation points so that inactivity of more than a define period will automatically trigger notification of the end users and other managers up the chain of the delay.

Figure 4 below shows a typical screen after the approval process has been completed and the SharePoint Portal creation process initiated to the point where the workflow user has been empowered to create the site.

The creation of the SharePoint portal is fully automated by SBM and will be initiated by the user clicking the blue button called “Create New SharePoint Site”. All meta data associated with the creation and approvals process will be captured within SBM for later reporting.



Figure 4 – After completing approval workflow activities