

**SBM CONNECT FOR
SHAREPOINT LETS YOU:**

- Know that you are working with the right version of a document relevant to the task at hand

- Gain a single view of task status and project performance – right from within a familiar environment like your SharePoint portal

- Expand the reach of your business processes to more customers - both internal and external to your organization - by leveraging your SharePoint portal

SBM Connect

For SharePoint

Is Your Company Realizing The Full Benefits Of Process Automation?

Companies are automating processes using Business Process Management (BPM) solutions to improve the accuracy of their business decisions, increase process visibility, and foster greater collaboration around tasks. However, the full benefits from process automation do not get realized at times. The following excerpts from conversations with our customers highlight some of challenges that they've run in to:

“We’ve automated our contract approval process. However, our contracts are stored in SharePoint and managed separately from this process. As our teams work on tasks related to reviewing and approving contracts, how do they know if they are making decisions based on the most recent version of a document?”

“Automating our release management processes using Serena Business Manager (SBM) increases process visibility by providing detailed insight into the status of tasks as well as rich project performance reports and dashboards. But our company has standardized on SharePoint as our project portal and executive teams don’t want to switch back and forth between applications to get to this information. How do we provide them with a 360° view of the project’s status – without them ever having to leave our portal?”

“We’ve automated our service desk-related processes. Is there a way to make this application more accessible to our customers - both internal and external to our organization – so that they can easily submit and review the status of their requests, perhaps even provide additional information to move these processes forward?”

It’s a fact that SharePoint implementations are mushrooming across organizations. A recent IDG CIO survey shows 62% of CIOs interviewed indicating SharePoint as being a critical component of their technology portfolio.

So why not combine the power of SBM, Serena’s BPM solution, with SharePoint’s document management and portal prowess to address the concerns listed above?



“Creating a project site on SharePoint allowed the Job Seeker and Job Poster product groups at CareerBuilder to move documentation, attachments, and meeting notes out of their personal computers into a central store for all project-related information. The new SBM Connect for SharePoint solution will ensure that as teams work on their tasks related to rolling out new job sites for clients, they are working off of the right versions of the project documentation at any given time.

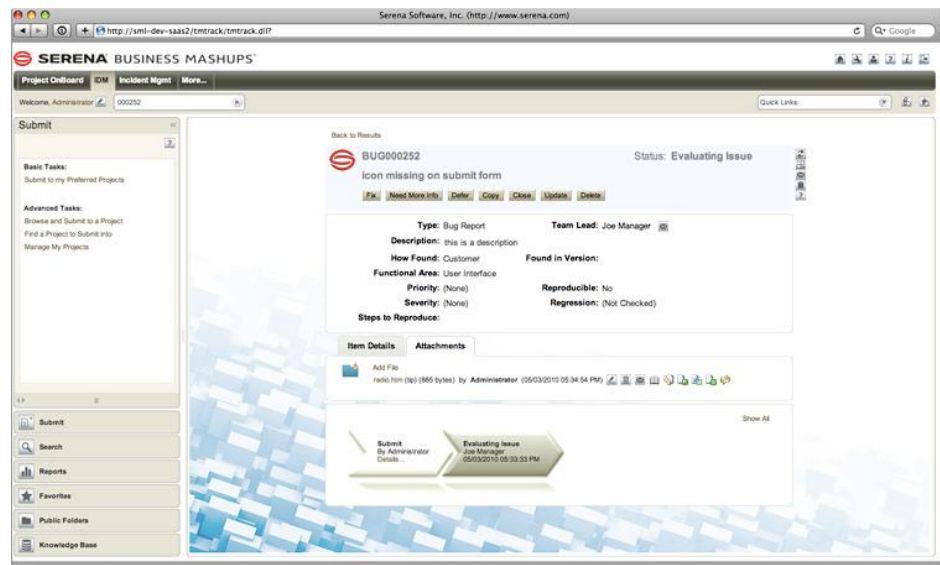
The business users are most excited about being able to access their reports and drill down into the details of tasks right from SharePoint. They can even submit requests and have processes kicked off without ever having to leave SharePoint.”

- Brian Speagle, CareerBuilder

SBM Connect For SharePoint: Improving Business Decision Accuracy, Process Visibility & Accessibility Using SharePoint

Increase the accuracy of business decisions by always accessing the right version of a document to get tasks done

Consider the previous example of the company that uses SharePoint to manage all of its contracts. By automating the contract approval process using SBM and leveraging SBM Connect for SharePoint, as soon as a process gets kicked off to initiate the review and approval of a new contract, a site gets automatically created within SharePoint to manage all the associated documents. Once a dedicated contract management site is created, teams can rest assured that they are always accessing the right version of a document relevant to the task at hand so that they can make accurate business decisions. The documents within this site are kept up-to-date by processes powered by SBM. Individuals from sales, finance, and legal can access and update documents related to the contract – directly from SharePoint as well as via the SBM user interface. Changes made are immediately visible to team members trying to access these documents either from SharePoint or via SBM.

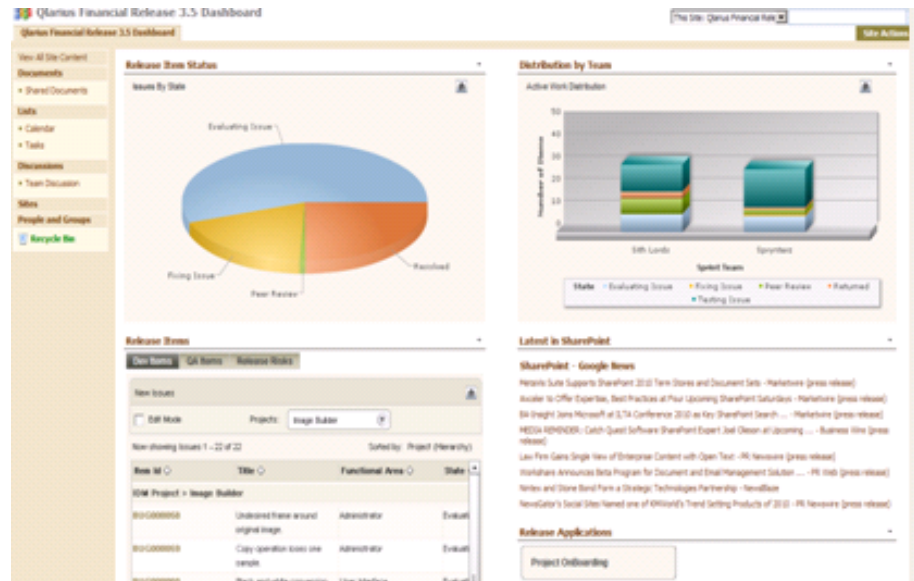


Changes made to documents through SharePoint are immediately visible in SBM and vice versa

SBM Connect for SharePoint provides the linkage between a specific business process and the associated documents and sites in SharePoint. It lets you tag specific documents or sites as related to a particular business process. You can also leverage pre-defined processes to visually configure site qualification and approval criteria. In addition, SBM Connect for SharePoint provides detailed audit trails and visibility into the life-cycle of documents that are linked to a particular process.

Gain a single view of task status and project performance – right from within the SharePoint portal

Managers can gain access to “to-do” lists, documents, and business performance dashboards related to a particular project from within a familiar environment to quickly make informed decisions and get work done.



Complete process transparency – right from within the SharePoint portal

For instance, in the product release management scenario outlined previously, the head of product development can get complete visibility into the progress of a release from the dedicated site - no more time lost on emails and phone calls in an effort to track down the status of a release. Immediate insight into the status of a release is presented through dashboards within the SharePoint portal – complete with the ability to drill down into various release metrics such as defect trends and risks. Similarly, a “demand management” process powered by SBM provides the Product Management team with real-time visibility into customer requests right from within the release management SharePoint site. An “issue management” process powered by SBM keeps track of escalations, time to resolution, and other KPIs within the same site. A “product launch” process powered by SBM helps the Program Office and Marketing team keep track of all the tasks that need to be completed prior to the roll-out of the product right from within the SharePoint portal.

Expand the reach of SBM applications by leveraging the SharePoint portal

By leveraging a familiar environment such as the SharePoint portal, business processes such as those related to service request fulfillment can be made far more accessible to customers both internal and external to an organization as they can interact with and move processes forward easily, without having to learn how to navigate a new environment such as SBM.

Supported versions of SharePoint:
Microsoft Office SharePoint Server
(MOSS) 2007, MOSS 2010,
Windows SharePoint Services
(WSS) 2007, WSS 2010

Supported versions of SBM:
SBM 2009.R3.01 or higher

Conclusion: SBM Connect for SharePoint is the ideal solution for managing the link between business processes and associated documents and sites in SharePoint. By leveraging an existing portal and automating business processes that span SharePoint and other systems, companies can benefit from a single point of access to 1) consolidated “to-do” lists; 2) process performance dashboards and 3) kick-starting a business process (e.g., to manage a new product release) – resulting in improved business process collaboration, visibility, and efficiency.