SAFE® REPORTING GUIDELINES for CLM 6.0.2 (or older)

Deploying the SAFe reports in your CLM JRS 6.0.2 (or older 6.x) environment

Abstract
This document describes how to import the SAFe reports delivered via archive files published on the external SAFe Landing page and the best practices for deploying those reports as widgets on your SAFe dashboards.

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SAFe Reports Overview

Last Update: Tuesday, January 31, 2017

Change History:

2017-01-13	Separated the document by version
2016-11-11	Expanded for SAFe 4.0 to include the SAFe 4.0 3- and 4-Level reports for 6.0.2
2016-03-15	Clarified instructions for 6.0.2 environments (simpler configuration process)
2016-03-08	Clarified the report archives to include SAFe and CLM versions
2016-01-06	Added Troubleshooting section for known JRS import issues

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STOP! Derby is not a supported database so please ensure your Data Warehouse is based on a supported technology.

This document describes the set of Jazz Reporting Service (JRS) reports developed to support SAFe® (Scaled Agile Framework) metrics, along with instructions on how to import those reports into your IBM Collaborative Lifecycle Management (CLM) solution environment. Most of these reports are packaged in separately downloadable archive files although a few of the team-level reports do come out of the box with JRS.

The report archives provided are aligned with specific versions of CLM and SAFe. In addition, versions of the reports that support both 3- and 4-Level SAFe 4.0 are provided. The archives are described below.

CLM Version (click the version to go to the appropriate section below)	SAFe Version	SAFe Archive	Notes	Status
CLM 6.0	SAFe 3.0	SAFe 3.0 Reports (6.0)	No updates since March 2016	Complete
CLM 6.0.1		SAFe 3.0 Reports (6.0.1)		Complete
CLM 6.0.2	SAFe 4.0	SAFe 4.0 [3-Level] (6.0.2)	Supports 3-Level SAFe 4.0. These are essentially the SAFe 3.0 reports updated for SAFe 4.0	Complete
		SAFe 4.0 [4-Level] (6.0.2)	Supports 4-Level SAFe 4.0. These are versions of the SAFe 4.0 3-Level reports augmented to support 4-Level SAFe.	Complete

Table 1: SAFe Report Archive Descriptions

Unless otherwise specified, you are free to use a report archive for the specified *or later* version of CLM (JRS). Following the instructions in the appropriate section below to import the reports. Later in this document the available reports, their purpose and setup are described.

Importing the SAFe 4.0 Reports

In the following sections, instructions for importing the applicable SAFe archive files into your CLM environment are described, grouped by CLM version.

CLM 6.0.2

**Required CLM (RTC, RDNG, RQM, JRS) version:** 6.0.2
Applicable SAFe Archive(s): SAFe 3.0 Reports (6.0.1), SAFe 4.0 [3-Level] (6.0.2), SAFe 4.0 [4-Level] (6.0.2)

Follow these instructions to import reports in the *applicable SAFe archive* into your JRS 6.0.2 *or later* environment. Note that the creation of project areas across all CLM components is optional, but you may encounter errors during import if you do not have a complete environment.

Note: If you are using the SAFe 4.0 "beta" templates, please consult the How to use the SAFe 4.0 templates in CLM *document before proceeding.*

1. If you do not already have a CLM 6.0.2 environment with SAFe project areas (SAFe 3.0 or SAFe 4.0), create a sample set of metadata for Portfolio and/or Program (otherwise, proceed to Step **2**):
    a. Install CLM 6.0.2 with the JRS feature and follow the instructions to configure your environment via /jts/setup.
    b. Create project areas using the SAFe templates:
        -   **[SAFe Program] RTC**
            i. On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates** (for SAFe 3.0 out of the box templates) or **Import Template** to import the SAFe 4.0 template(s) into your environment
            ii. Create a new SAFe Program project area based on the SAFe Program process template
        -   **[SAFe Portfolio CLM Lifecycle Project Area] CLM (JTS)** – *Skip this step* if you are not using all of the CLM component products *or* if you are using the SAFe 4.0 "beta" templates
            i. On the Jazz Team Server Administration page, select the **Create Lifecycle Project** option.
            ii. Create a CLM LPA using the SAFe templates (default)
        -   **[SAFe Portfolio] RTC**
            iii. On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates** or **Import Template** (if you did not already do this above)
            iv. Create a new SAFe Portfolio project area based on the SAFe Portfolio process template
        -   **[SAFe Portfolio] RDNG**
            i. Create a Portfolio project area based on the SAFe project template:

Hint: you must go to the /rm/web URL and select Create Project Area from the administration menu. You must have an RDNG project area already created in order to upload the SAFe 4.0 "beta" RDNG template before creating a SAFe 4.0 Portfolio RDNG project area based on that template.
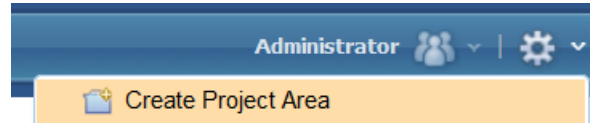
- **[SAFe Portfolio]** **RQM** – *Skip this step* if you are using the SAFe 4.0 "beta" templates in a 6.0.1 environment
    - i.   On the RQM Application Administration page, navigate to Templates and then **Deploy Predefined Templates**
    - ii.   Create a new SAFe Portfolio project area based on the SAFe Portfolio process template

c. Create a *Value Stream* artifact and a *Program* artifact in **RDNG** (if you are that application). Ensure that you specify the attribute values in each of these artifacts: *Budgeted Capacity, Allocated Capacity, Budgeted Investment, Allocated Investment, Total Market Opportunity.*

d. Run data collection via the Data Collection application:
- Launch DCC in your browser: https://<host>:<port>/dcc/web
- Click **Run all data warehouse collection jobs**
- Ensure all jobs complete successfully

e. Force a metadata refresh for your JRS data warehouse Data Source:
- Launch JRS in your browser: https://<host>:<port>/rs
- Click the **Report Builder** menu drop-down, then **Admin**:
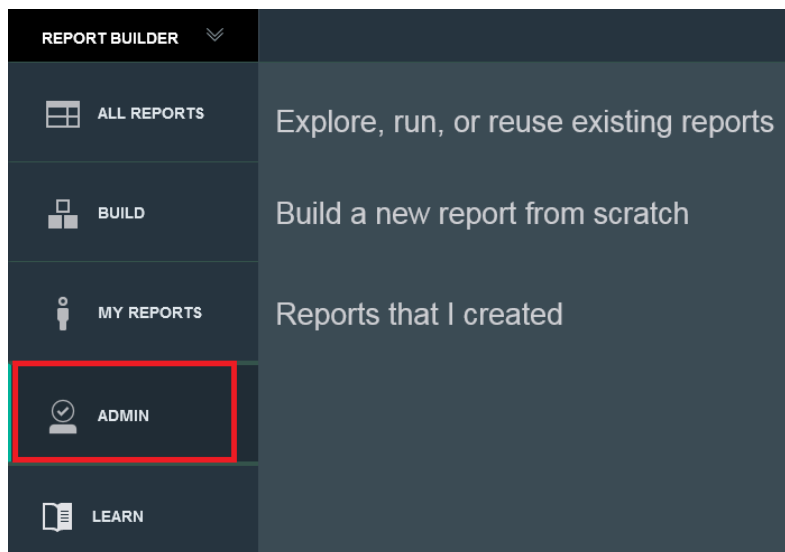
- Click **Data Sources** and select the appropriate data source to refresh:
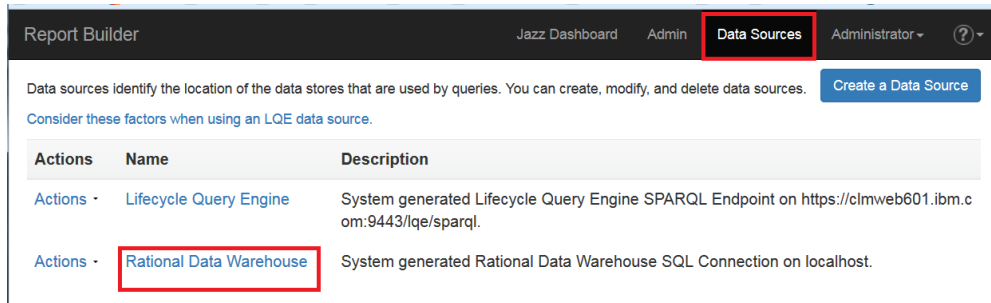
- Edit the data warehouse data source and click **Refresh**:
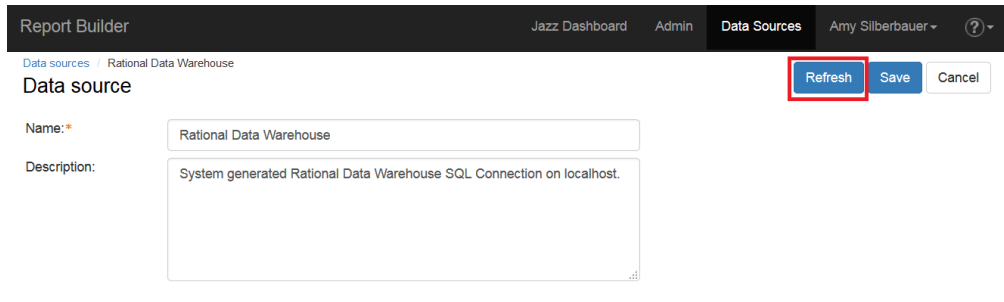
     f.   Click **Report Builder** to return to the report builder user home page.

2.   Import the SAFe reports appropriate for your level of CLM:
     a.   Launch JRS in your browser: https://<host>:<port>/rs
     b.   Click the **Report Builder** menu drop-down, then **Admin**:
     c.   In **Import ready-to-use reports**, select **Optional: Import additional reports such as those provided by IBM, business partners, or others**.
     d.   Browse to the location where you have downloaded the *applicable SAFe report archives* and select any one of them. Click OK.
     e.   Repeat this process to import the remaining archive files.

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*Note that some reports are in both the 3-Level and 4-Level archives, so if the **Replace existing resources** checkbox is <u>not</u> checked, you will see duplicates.*

Expected output for SAFe 4.0 [4-Level] (6.0.2) import:

28 reports imported.   3:27:24 PM

The following reports were imported successfully:

Capability Progress Report
Portfolio Roadmap (by Value Stream PI)
Unresolved Defects by Program
All Committed Program Work (by count) for Active Strategic Themes [4-Level]
Value Stream Budgeted Capacity
Feature Progress Report
Program Budgeted Capacity [4-Level]
Planned Business Value for [Value Stream/Program/Team]
Value Stream Roadmap (by Program)
Estimated vs Actual Story Points
Active "Hard" Dependencies
Story Progress Report
Average Achieved Business Value for [Value Stream/Program/Team]
Planned Program Features without associated Capability
Architectural Runway (Capabilities by Value Stream)
Program Roadmap (by Team, by PI)
Active "Soft" Dependencies
All Committed Team Work (by count) for Active Strategic Themes [4-Level]
Feature: Defined Effort (Story Points) [4-Level]
Value Stream Epics: Defined Effort (Story Points)
Capabilities: Defined Effort (Story Points)
Capability - Feature PI Mismatch
Architectural Runway (Features by Program) [4-Level]
Portfolio Average Achieved Value [4-Level]
Portfolio Roadmap (by Value Stream)
Program Epics: Defined Effort (Story Points)
Ready for System Demo [Value Stream/Program/Team]
Portfolio Status [4-Level]

Expected output for SAFe 4.0 [3-Level] (6.0.2):

23 reports imported.   3:30:34 PM

The following reports were imported successfully:

Program Epic Progress Report
Portfolio Status [3-Level]
Story Progress Report
Portfolio Roadmap (by Feature PI)
Average Achieved Business Value for [Value Stream/Program/Team]
Portfolio Roadmap (by Program)
Program Roadmap (by Team, by PI)
All Committed Team Work (by count) for Active Strategic Themes [3-Level]
Active "Soft" Dependencies
Unresolved Defects by Program
Portfolio Average Achieved Value [3-Level]
Program Budgeted Capacity [3-Level]
All Committed Program Work (by count) for Active Strategic Themes [3-Level]
Feature Progress Report
Features: Defined Effort (Story Points) [3-Level]
Architectural Runway (Features by Program) [3-Level]
Planned Business Value for [Value Stream/Program/Team]
Portfolio Roadmap (by Strategic Theme) [3-Level]
Estimated vs Actual Story Points
Ready for System Demo [Value Stream/Program/Team]
Program Epics: Defined Effort (Story Points)
Planned Program Features without associated Program or Portfolio Epic
Active "Hard" Dependencies

Troubleshooting

JRS will attempt to import all of the reports in the archive. If it cannot successfully do that, the reports that can be imported will be. Depending on the version of CLM in use, JRS will let you know which reports imported successfully and which failed.

If you encounter errors during the import of SAFe reports, first ensure that you have followed all instructions above to prepare your environment before the import. Here are some general reasons why your import may result in an error:

1. **You are using RTC only, not RDNG or RQM.** In this case, the reports that require RDNG or RQM will not import successfully. The RTC-only reports will import without error.
2. **You have created an RTC Program project area, but nothing for the Portfolio.** In this case, the Portfolio-specific reports will not import successfully, but the Program-level reports will import without error.
3. **You have deployed CLM 6.0 or 6.0.1 and have not created any sample data.** The reports rely on updated metadata in the data warehouse, which occurs as a result of having sample work items and other artifacts that have been collected in the data warehouse. Without that metadata, some of the reports will not import successfully.
4. **You have not created any project areas (any level of CLM).** As described above, metadata must be in the data warehouse. This most easily is done through creation of project areas (and in versions of CLM before 6.0.2, the creation of sample data is also required).
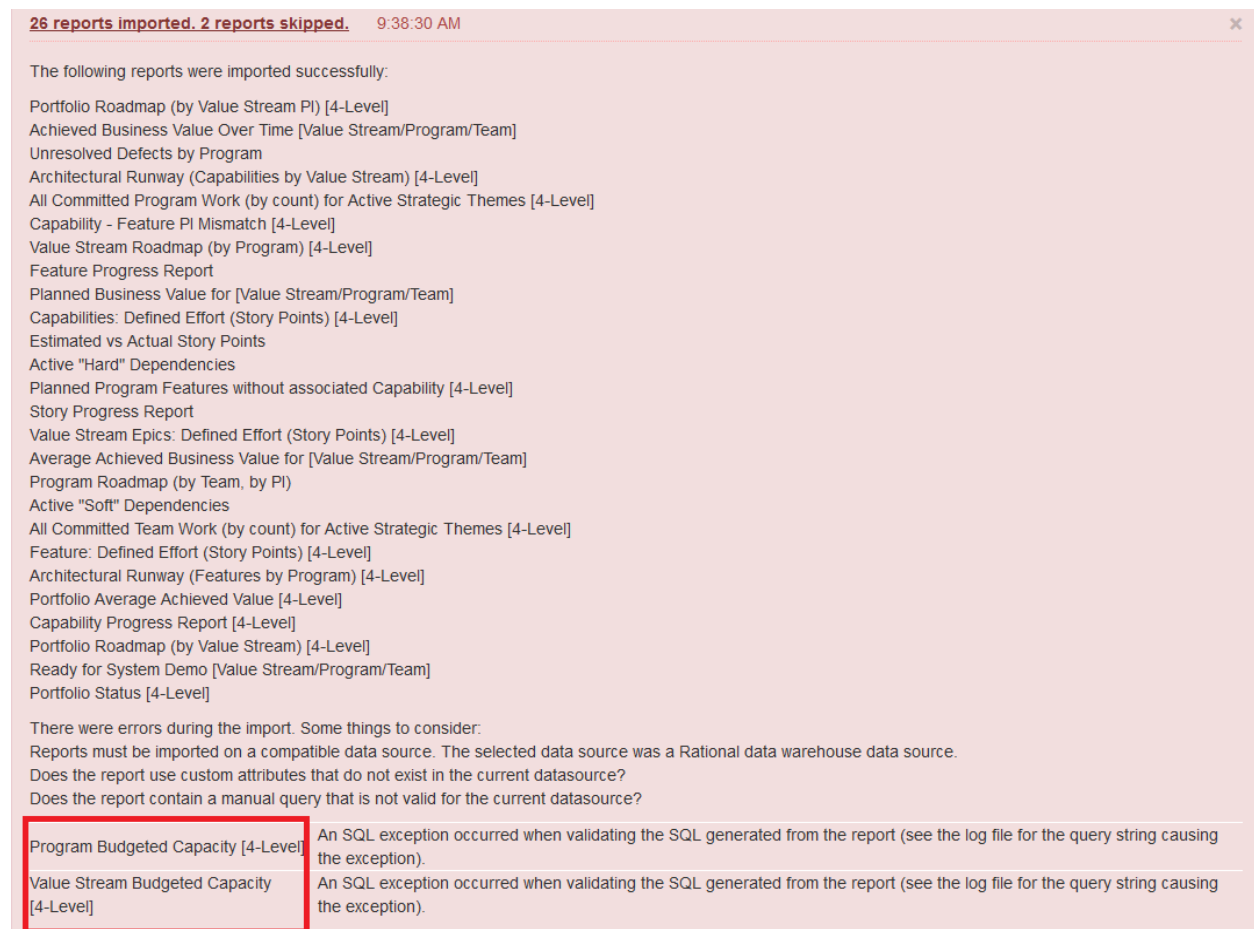
Troubleshooting (6.0.2)

Other known issues that may cause errors during import are related to differences between the SAFe 3.0 and SAFe 4.0 templates. If you are using the SAFe 3.0 templates, refer to Error! Reference source not ound. for further information as there are no significant changes between the 6.0.1 and 6.0.2 environments from a SAFe support and reporting perspective.

If you are using the SAFe 4.0 "beta" templates, the SAFe 4.0 reports assume the following:

- You are using the latest versions of the "beta" templates posted on the SAFe 4.0 Assets page
- You are running CLM (JRS) 6.0.2

If you have configured existing project areas to support SAFe 4.0 following instructions provided on the Configuring the SAFe® Methodology in CLM page, you will be able to import the reports successfully as long as you have a complete SAFe environment (i.e. you have defined all of the SAFe artifacts and attributes).

If you neglected to create the Value Stream and Program artifacts in RDNG as instructed, you will see the following:

26 reports imported. 2 reports skipped.   9:38:30 AM   ×

The following reports were imported successfully:

Portfolio Roadmap (by Value Stream PI) [4-Level]
Achieved Business Value Over Time [Value Stream/Program/Team]
Unresolved Defects by Program
Architectural Runway (Capabilities by Value Stream) [4-Level]
All Committed Program Work (by count) for Active Strategic Themes [4-Level]
Capability - Feature PI Mismatch [4-Level]
Value Stream Roadmap (by Program) [4-Level]
Feature Progress Report
Planned Business Value for [Value Stream/Program/Team]
Capabilities: Defined Effort (Story Points) [4-Level]
Estimated vs Actual Story Points
Active "Hard" Dependencies
Planned Program Features without associated Capability [4-Level]
Story Progress Report
Value Stream Epics: Defined Effort (Story Points) [4-Level]
Average Achieved Business Value for [Value Stream/Program/Team]
Program Roadmap (by Team, by PI)
Active "Soft" Dependencies
All Committed Team Work (by count) for Active Strategic Themes [4-Level]
Feature: Defined Effort (Story Points) [4-Level]
Architectural Runway (Features by Program) [4-Level]
Portfolio Average Achieved Value [4-Level]
Capability Progress Report [4-Level]
Portfolio Roadmap (by Value Stream) [4-Level]
Ready for System Demo [Value Stream/Program/Team]
Portfolio Status [4-Level]

There were errors during the import. Some things to consider:
Reports must be imported on a compatible data source. The selected data source was a Rational data warehouse data source.
Does the report use custom attributes that do not exist in the current datasource?
Does the report contain a manual query that is not valid for the current datasource?

Program Budgeted Capacity [4-Level]	An SQL exception occurred when validating the SQL generated from the report (see the log file for the query string causing the exception).
Value Stream Budgeted Capacity [4-Level]	An SQL exception occurred when validating the SQL generated from the report (see the log file for the query string causing the exception).

SAFe 4.0 Reports – Descriptions & Usage

SAFe Metrics Supported

The metrics for SAFe 4.0 are an expanded set applicable to SAFe 3.0 as well. A full description of the SAFe metrics can be found for SAFe 4.0 on the Scaled Agile Framework web site: http://www.scaledagileframework.com/metrics/.

The prescribed SAFe metrics supported via JRS reports are broken down by SAFe Level and briefly described in Table 2: Metrics prescribed by SAFe below.

SAFe Level	Metric	Link
Value Stream	Value Stream Performance Metrics	http://www.scaledagileframework.com/metrics/#V3
Program	Feature Progress	http://www.scaledagileframework.com/metrics/#P0
	Performance Metrics	http://www.scaledagileframework.com/metrics/#P3
Team	Iteration Metrics	http://www.scaledagileframework.com/metrics/#T1

Table 2: Metrics prescribed by SAFe

In addition to the metrics prescribed by SAFe and supported by JRS reports, we have provided additional reports that we believe add value above and beyond those prescribed by SAFe.

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*Note: The **quality** reports require that Rational Quality Manager is being used as part of the SAFe Portfolio solution.*

Locate the section below that corresponds to your CLM version and the SAFe Reports deployed in your environment for a complete description of the reports, the purpose, and the suggested usage.

SAFe 4.0 [4-Level] Reports (6.0.2)

The tables below describe the set of SAFe 4.0 4-Level reports suitable for the associated SAFe levels and roles. In SAFe 4.0, "4-Level" refers to the implementation of the SAFe Value Stream layer, in addition to the SAFe Portfolio, Program and Team layers. If you are not using 4-Level SAFe, proceed to the 3-Level reports here: SAFe 4.0 [3-Level] Reports (6.0.2).

What is the difference between 3- and 4-Level SAFe from a reporting perspective?

*In 4-Level SAFe, the domain model that defines the RTC work item navigation assumes: **Portfolio Epic > Value Stream Epic > Capability > Feature > Story**. In 3-Level SAFe, there is no Value Stream layer, so the assumed model is: **Portfolio Epic > Program Epic > Feature > Story**, as in SAFe 3.0. You are free to edit the reports to suit your organizational requirements in terms of the navigation.*

Each table describes:

- **Dashboard Tab**: Guidance on the most suitable dashboard tab for the report widget, based on SAFe level and the role(s) likely to consume the report information

- **Answers the question…** : Description of what question the reports answers
- **Report Name & Description:** The report name (which can be used to find the report in Report Builder) along with a brief description
- **Filters:** A high-level description about how to set the filters

Portfolio/Value Stream Reports

In the Portfolio and Value Stream reports, the filters may vary depending upon these factors:

- Hybrid Programs – In this situation, you may have Programs that are not SAFe-based or that include Teams which are not SAFe-based. The work item types included in these reports may need to be expanded beyond SAFe to include types in use in other processes. For example, a SAFe Program assumes the *Feature* work item type; a traditional Program might be using *Business Need* or *Project Change Request*. Similarly, a SAFe Team assumes the *Story* work item type; a traditional Team might be using *Business Need* or *Task*.
- Program Timelines – In some reports that include Program-level Features, the Program Increments may differ. When reporting across all Programs, remember to specify all Feature Program Increments to see results.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Portfolio Overview	**How is allocated work aligned with business strategy for the current PI?**	**All Committed Program Work (by count) for Active Strategic Themes [4-Level]** **Graph:** Shows the committed Program-level work (number of Features) currently being tracked for the current Program Increment for active Strategic Themes. This report is intended to show the distribution of work across the Strategic Themes to ensure the proper balance of investments. **Table:** Shows details of the work broken down by Portfolio Epic > Value Stream Epic > Capability > Feature with hyperlinks to all work items. *Note that all links are <u>required</u> so future PIs still being planned that do not yet have Features articulated are excluded from the results.*	**Limit Scope:** All RTC project areas, RDNG SAFe Portfolio project area **Capability PI:** Current PI (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What is our Portfolio Epic delivery roadmap?	**Portfolio Roadmap (by Value Stream PI)** **Graph:** Shows the # of Value Stream Epics for each Portfolio Epic on the roadmap, grouped by Value Stream PI. **Table:** Provides details including related Strategic Themes, target Value Stream PIs and hyperlinked work items.	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area
	Which Value Streams contribute to delivery of Portfolio Epics?	**Portfolio Roadmap (by Value Stream)** **Graph:** Shows the # of Value Stream Epics for each Portfolio Epic on the roadmap, grouped by Value Stream.	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area

		Table: Provides details including related Strategic Themes, target Value Stream PIs and hyperlinked work items.	
	How is Portfolio budget disbursed across Value Streams?	**Value Stream Budgeted Capacity** **Graph:** Shows the budgeted capacity for the Portfolio's Value Streams as a percentage of allocation across the Portfolio. **Table:** The details include the precise budgeted capacity and investment for the Value Streams as well as the break down by Program.	**Limit Scope:** RDNG SAFe Portfolio project area
	Value Stream Architectural Runway	**Architectural Runway (Capabilities by Value Stream)** **Graph:** Shows the set of Enabler work by Value Stream grouped by PI. **Table**: Provides details and breakdown from Portfolio Epic to team-level work (if it exists). *Note that, by default, the Portfolio Epic and Value Stream Epic could be Business or Enabler type and all lower-level work items are assumed to be Enabler type. This can be changed via the filters for each Work Item Work Type attribute.*	**Limit Scope:** All RTC project areas
Value Stream Overview	**How is Portfolio budget disbursed across Programs?**	**Program Budgeted Capacity [4-Level]** **Graph:** Shows the budgeted capacity for the Value Streams' Programs as a percentage of allocation across the Portfolio. **Table:** The details include the precise budgeted capacity and investment for the Value Streams as well as the break down by Program.	**Limit Scope:** RDNG SAFe Portfolio project area (optional) **Value Stream**: All Value Streams, by default. To view information for a specific Value Stream, specify the Value Stream name
	Program Architectural Runway	**Architectural Runway (Features by Program) [4-Level]** **Graph:** Shows the roadmap of Enabler Features grouped by Program. **Table:** The table view provides the detailed breakdown of work from Portfolio Epics through team-level work items. Only the Portfolio Epic > Value Stream Epic > Capability > Feature part of the traversal tree are required, so this report also shows work in Analysis at the Value Stream level. *Note that, by default, the Portfolio Epic and Value Stream Epic could be Business or Enabler type and all lower-level work items are assumed to be Enabler type. This can be changed via the filters for each Work Item Work Type attribute.*	**Limit Scope:** All RTC project areas

	What are the Value Streams' Programs working on?	**Value Stream Roadmap (by Program)** **Graph:** Shows the # of Features (or the # of Capabilities if there are no Features) for each Value Stream Epic on the roadmap or on the backlog grouped by Program. **Table:** Shows results grouped by business strategy and the breakdown: Portfolio Epics > Value Stream Epics> Capabilities > Features with hyperlinked work items.	**Limit Scope:** All RTC project areas, RDNG SAFe Portfolio project area (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
Portfolio Execution (Current PI)	How are we progressing on delivery of Capabilities?	**Capability Progress Report** **Graph:** Shows the set of Features that are new, in progress, complete and planned for unresolved Capabilities for the current Program Increment. **Table:** Details with work item hyperlinks. This report gives an indication at a point in time as to the progress of Capabilities and alerts to any plan issues.	**Limit Scope:** All RTC project areas **Capability PI:** Current PI (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs (optional) **Status Group category (Capability [Type: Work Item]):** Unresolved, by default. To view completed Capabilities and progress, include Resolved value
	What is ready to be demonstrated?	**Ready for System Demo [Value Stream/Program/Team]** **Table:** Shows work items completed and ready for a System Demonstration. Limit the scope to a Value Stream, Program or Team by setting the PI Objective type appropriately.	**Limit Scope:** RTC Portfolio project area **PI Objective Type:** Value Stream
	What is the defined effort for this PI?	**Capabilities: Defined Effort (Story Points)** **Graph:** Displays the defined effort as a sum of Story Points for Capabilities by rolling up the Story Points from Stories: Story > Feature > Capability. **Table:** Shows details from the Value Stream Epic down to the Stories. The links from Value Stream Epic through Story are required, so only those Capabilities that have been planned are displayed.	**Limit Scope:** All RTC project areas **Capability PI:** Current PI
	What is the planned value to be delivered for this PI?	**Planned Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Portfolio project area **Objective Type:** Value Stream **Objective Iteration:** Current PI

Risks and Impediments	Are there planning issues between the Portfolio and the Programs?	**Capability – Feature PI Mismatch** **Graph:** Shows # of Features by Program that have a targeted PI that is different than the tracking Capability PI. **Table:** Shows the details of the Capabilities by Value Stream and the tracked Feature work. All work items are hyperlinked.	**Limit Scope:** All RTC project areas **Capability PI:** Current PI **Feature PI**: Current PI in each of the Program timelines (optional) **Feature Type**: Feature, by default. Specify additional types to support hybrid Programs
	What have the Programs committed that the Portfolio is not tracking?	**Planned Program Features without associated Capability** **Table:** This report shows the Program Features currently committed for the specified PI that do not have any associated Capability at the Value Stream level. Use this report to understand potential process violations for the iterations being planned.	**Limit Scope:** All RTC project areas **Feature PI**: Current PI in each of the Program timelines (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What active work do the Value Streams have marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocked link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** RTC Portfolio project area **Blocked Team:** Portfolio and Value Streams
	What work is blocking work of the Value Streams?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** Portfolio and Value Streams **Blocking Team:** All RTC project areas
	Which Defects are affecting Portfolio quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** All RTC project areas, RQM SAFe Portfolio project area **Defect Iteration:** All Backlog iterations on all timelines in scope (Defect is *not* on Backlog) (optional) **Status Group Category (Defect [Type: Work Item]):** Unresolved, by default

Trends	What is average achieved value across the Portfolio?	**Portfolio Average Achieved Value [4-Level]** **Graph:** Shows the average of achieved value across the Portfolio at the Value Stream, Program and Team levels. **Table:** Provides details about the PI Objectives and the individual value, including the owner (project/team) of the Objectives.	**Limit Scope:** All RTC project areas
	How are the Value Streams doing on value delivery?	**Average Achieved Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Portfolio project area **Objective Type:** Value Stream
	How well are we estimating effort for the Portfolio work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The <u>actual story points</u> are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Portfolio project area **Work Item Type:** Value Stream Epic (optional) **Work Item Iteration**: Select one or more PIs
	How well are we estimating effort for the Value Stream work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The <u>actual story points</u> are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Portfolio project area **Work Item Type:** Capability (optional) **Work Item Iteration**: Select one or more PIs
	How many Features have the Value Streams delivered?	**Portfolio Status [4-Level]** **Graph:** Shows the # of resolved Features for each Value Stream by PI across the Portfolio. **Table:** Shows details.	**Limit Scope:** All RTC project areas **Capability PI:** Value Stream PI Cadence (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs

Program Reports

In the Program reports, the filters may vary depending upon these factors:

- Teams are in separate RTC project areas – Include those project areas in the scope of the report
- Teams are using processes other than agile – Where team-level work item types are specified, consider that you may need to specify additional types other than just Story

In both of these cases, reports that require the specification of iterations must include the iterations across all timelines, Program-level and Team-level.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Program Overview	How is allocated work aligned with business strategy for the current PI?	**All Committed Team Work (by count) for Active Strategic Themes [4-Level]** **Graph:** Shows the committed Team-level work (number of Stories) being tracked for the current Program Increment for active Strategic Themes. This report is intended to show the distribution of work across the Strategic Themes to ensure the proper balance of investments. **Table:** Shows details of the work broken down by Portfolio Epic > Value Stream Epic > Capability > Feature > Story with hyperlinks to all work items.	**Limit Scope:** All RTC project areas, RDNG SAFe Portfolio project area **Feature PI:** Set to current PI (Program Increment). Expand the scope by specifying additional past PIs (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs (optional) **Story Type:** Default is Story. Set to appropriate work item type for non-agile Teams
	What are the Program's Teams working on?	**Program Roadmap (by Team, by PI)** **Graph:** Shows the # of Stories for each Feature on the Program roadmap or on the backlog, grouped by Team and Feature PI. **Details:** Includes the results grouped by Feature with associate PI Objectives for Team work items.	**Limit Scope:** RTC Program and Team project areas in scope (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs (optional) **Story Type:** Story, by default. Specify additional types to support hybrid Teams
	Program Architectural Runway	**Architectural Runway (Features by Program) [4-Level]** **Graph:** Shows the roadmap of Enabler Features grouped by Program. **Table:** The table view provides the detailed breakdown of work from Portfolio Epics through team-level work items. Only the Portfolio Epic > Value Stream Epic > Capability > Feature part of the traversal tree is required, so this report also shows work in Analysis at the Value Stream level. *Note that, by default, the Portfolio Epic and Value Stream Epic could be Business or Enabler type and all lower-level work items are assumed to be Enabler type. This can be changed via the filters for each Work Item Work Type attribute.*	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope

Current Program Increment (PI) Progress	What is ready to be demonstrated?	**Ready for System Demo [Value Stream/Program/Team]** **Table:** Shows work items completed and ready for a System Demonstration. Limit the scope to a Value Stream, Program or Team by setting the PI Objective type appropriately.	**Limit Scope:** RTC Program and Team project areas in scope **PI Objective Type:** Team, by default. Specify Program or Value Stream to see what is ready to be demonstrated at those levels
	What is the planned value to be delivered for this PI?	**Planned Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Program and Team project areas in scope **Objective Type:** Program, Team **Objective Iteration:** Current Program PI and all of the Team iterations within that PI
	How are the Teams progressing against the plan?	**Story Progress Report** **Graph:** Shows the count of Stories achieved, in progress and remaining by Team for the Program and Iteration scope specified. **Table:** Shows break down from Program Features to Stories with hyperlinked work items. This report can be used to show all Programs or just Teams within a specific Program. It can also be used to show specific iterations for the Story.	**Limit Scope:** RTC Program and Team project areas in scope **Team Iteration:** All Team iterations within the current Program PI **Feature PI**: Current Program PI (optional) **Story Type:** Story, by default. For Hybrid Programs, specify additional types (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types
	What is the Feature progress?	**Feature Progress Report** **Graph**: Shows the set of Features in progress, along with the planned number of stories and the actual number of stories that have been resolved to date. **Table:** Shows details of the breakdown from Feature to Story with hyperlinked work items. This report gives an indication at a point in time as to the progress of Features and alerts to any plan issues.	**Limit Scope:** RTC Program and Team project areas in scope **Feature PI**: Current Program PI (optional) **Story Type:** Story, by default. For Hybrid Programs, specify additional types (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types

	What is the defined effort for Features in this PI?	**Features: Defined Effort (Story Points) [4-Level]** **Graph:** Displays the defined effort as a sum of Story Points for Features by rolling up the Story Points from Stories: Story > Feature. **Table:** Shows details from the Value Stream Epic down to the Stories. The links from Value Stream Epic through Story are required, so only those Features that have been planned are displayed.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope **Feature PI:** Current Program PI
Risks and Impediments	**Are there planning issues between the Portfolio and this Program?**	**Capability – Feature PI Mismatch** **Graph:** Shows # of Features by Program that have a targeted PI that is different than the tracking Capability PI. **Table:** Shows the details of the Capabilities by Value Stream and the tracked Feature work. All work items are hyperlinked.	**Limit Scope:** RTC Portfolio project area, RTC Program project area in scope **Capability PI:** Current PI **Feature PI**: Current PI (not any of) (optional) **Feature Type**: Feature, by default. Specify additional types to support hybrid Programs
	Have we committed Features without associated Capabilities?	**Planned Program Features without associated Capability** **Table:** This report shows the Program Features currently committed for the specified PI that do not have any associated Capability at the Value Stream level. Use this report to understand potential process violations for the iterations being planned.	**Limit Scope:** RTC Portfolio project area, RTC Program project area in scope **Feature PI**: Current PI (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What active work does my Program have marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocked link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** RTC Program (and Team) project areas in scope **Blocked Team:** Program and Teams in scope
	What work is blocking work of my Program?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** Program and Teams in scope **Blocking Team:** All other Programs, Teams (and Portfolio and Value Streams, if desired) in scope

	What work is my Program blocking?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** All other Programs, Teams (and Portfolio and Value Streams, if desired) in scope **Blocking Team:** Program and Teams in scope
	Which Defects are affecting Program quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RQM SAFe Portfolio project area, RTC Program and Team project areas in scope **Defect Iteration:** Backlog iteration on Program (and Team) timeline (Defect is *not* on Backlog) (optional) **Status Group Category (Defect [Type: Work Item]):** Unresolved, by default
Trends	How is my Program doing on value delivery?	**Average Achieved Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Program and Team project areas in scope **Objective Type:** Program, Team
	How well are we estimating effort for the Program work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The <u>actual story points</u> are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Program project area in scope **Work Item Type:** Feature (optional) **Work Item Iteration**: Select one or more PIs.

	How many Features has my Program delivered?	**Portfolio Status [4-Level]** **Graph:** Shows the # of resolved Features for each Value Stream by PI across the Portfolio. **Table:** Shows details.	**Limit Scope:** RTC Portfolio project area, RTC Program project area in scope (optional) **Capability PI:** Specific PIs to scope the result set (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	Are we improving our velocity?	**[JRS ready-to-use report – OOTB]** **Team Velocity** Shows the number of story points completed in each iteration.	**Project:** RTC Program and Team project areas in scope **Timeline:** Project timeline(s) **Team:** All Teams in scope

Team Reports

Many of the reports on the Team Dashboard are simply Program-level reports with the scoping set for the specific Team. Other reports are delivered with JRS out of the box.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Scrum Master	Which stories require attention?	**[JRS ready-to-use report – OOTB]** **Incomplete stories (table and graph)** Shows the stories targeted to the current iteration that have not been completed.	**Project:** RTC Program project area for Team in scope or RTC Team project area in scope if it is separate from Program **Team:** Team in scope
	Which Defects are affecting Team quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RQM SAFe Portfolio project area, RTC Program and Team project areas in scope **Defect Iteration:** Backlog iteration for Team in scope (Defect is *not* on Backlog) (optional) **Status Group Category (Defect [Type: Work Item]):** Unresolved, by default
	How are we progressing against the plan?	**Story Progress Report** **Graph:** Shows the count of Stories achieved, in progress and remaining by Team for the Program and Iteration scope specified. **Table:** Shows break down from Program Features to Stories with hyperlinked work items.	**Limit Scope:** RTC Program and Team project areas in scope **Team Iteration:** All Team iterations within the current Program PI **Feature PI**: Current Program PI

		This report can be used to show all Programs or just Teams within a specific Program. It can also be used to show specific iterations for the Story.	(optional) **Story Type:** Story, by default. For Hybrid Programs, specify additional types (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types
	What is the current status?	**[JRS ready-to-use report – OOTB]** **Burndown by Story Points** Shows the number of story points assigned to work items that are either open or in progress over daily intervals.	**Project:** RTC Program and Team project areas in scope **Iteration:** Team iteration **Team:** Team in scope
		[JRS ready-to-use report – OOTB] **Burnup by Story Points** Shows the number of story points associated with completed work over daily intervals.	
	What has my Team marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocks link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** RTC Program and Team project areas in scope **Blocked Team:** Team in scope
	What work is blocking work of my Team?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** Team in scope **Blocking Team:** All other Programs (and Portfolio if desired) in scope
	What work is blocked by my Team?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** All other Programs (and Portfolio if desired) in scope **Blocking Team:** Team in scope
Product Owner	What are we ready to demonstrate?	**Ready for System Demo [Value Stream/Program/Team]** **Table:** Shows work items completed and ready for a System Demonstration. Limit the scope to a Value Stream, Program or Team by setting the PI Objective type appropriately.	**Limit Scope:** RTC Program and Team project areas in scope **Owning Team:** Team in scope

	Are we improving our value delivery?	**Average Achieved Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Program and Team project areas in scope **PI Objective Type:** Team **Team:** Team in scope
	Are we improving our velocity?	**[JRS ready-to-use report – OOTB]** **Team Velocity** Shows the number of story points completed in each iteration.	**Project:** RTC Program and Team project areas in scope **Timeline:** Project timeline(s) **Team:** Team in scope
	What is the Feature progress?	**Feature Progress Report** **Graph**: Shows the set of Features in progress, along with the planned number of stories and the actual number of stories that have been resolved to date. **Table:** Shows details of the breakdown from Feature to Story with hyperlinked work items. This report gives an indication at a point in time as to the progress of Features and alerts to any plan issues.	**Limit Scope:** RTC Program and Team project areas in scope **Feature PI**: Current Program PI (optional) **Story Type:** Story, by default. For Hybrid Programs, specify additional types (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types

SAFe 4.0 [3-Level] Reports (6.0.2)

The tables below describe the set of SAFe 4.0 3-Level reports suitable for the associated SAFe levels and roles. In SAFe 4.0, "3-Level" refers to the implementation of the SAFe Portfolio without the Value Stream layer, in addition to the Program and Team layers.

What is the difference between 3- and 4-Level SAFe from a reporting perspective?

*In 4-Level SAFe, the domain model that defines the RTC work item artifacts assumes: **Portfolio Epic > Value Stream Epic > Capability > Feature > Story**. In 3-Level SAFe, there is no Value Stream layer, so the assumed model is: **Portfolio Epic > Program Epic > Feature > Story**, as in SAFe 3.0.*

Each table below describes:

- **Dashboard Tab**: Guidance on the most suitable dashboard tab for the report widget, based on SAFe level and the role(s) likely to consume the report information
- **Answers the question…** : Description of what question the reports answers
- **Report Name & Description:** The report name (which can be used to find the report in Report Builder) along with a brief description
- **Filters:** A high-level description about how to set the filters

Portfolio Reports

In the Portfolio reports, the filters may vary depending upon these factors:

- Hybrid Programs – In this situation, you may have Programs that are not SAFe-based or that include Teams which are not SAFe-based. The work item types included in these reports may need to be expanding beyond SAFe to include types in use in other processes.
- Program Timelines – In some reports that include Program-level Features, the Program Increments may differ. When reporting across all Programs, remember to specify all Feature Program Increments to see results.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Portfolio Overview	How is allocated work aligned with business strategy for the current PI?	**All Committed Program Work (by count) for Active Strategic Themes [3-Level]** **Graph:** Shows the committed Program-level work (number of Features) currently being tracked for the current Program Increment for active Strategic Themes. This report is intended to show the distribution of work across the Strategic Themes to ensure the proper balance of investments. **Table:** Shows details of the work broken down by Portfolio Epic > Program Epic > Feature with hyperlinks to all work items. *Note that all links are required so future PIs still being planned that do not yet have Features articulated are excluded from the results.*	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area, all RTC Program project areas **Feature PI:** Current PI (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What is our Portfolio Epic delivery roadmap?	**Portfolio Roadmap (by Feature PI)** **Graph:** Shows the # of Features on the roadmap for each Program that are either in progress or complete, grouped by Feature PI. **Table:** Provides details including related Strategic Themes, associated Portfolio and Program Epics and hyperlinked data.	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area, all RTC Program project areas (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	Which Programs contribute to delivery of Portfolio Epics?	**Portfolio Roadmap (by Program)** **Graph:** Shows the # of Features on the roadmap for each Program that are either in progress or complete, grouped by Program. **Table:** Provides details including related Strategic Themes, associated Portfolio and Program Epics and hyperlinked data.	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area, all RTC Program project areas (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	How is Portfolio budget disbursed across Programs?	**Program Budgeted Capacity [3-Level]** **Graph:** Shows the budgeted capacity for the Portfolio's Programs as a percentage of allocation across the Portfolio. The details include the precise budgeted capacity and investment for each Program as well as alignment to business strategy.	**Limit Scope:** RDNG SAFe Portfolio project area

		Table: The details include the precise budgeted capacity and investment for the Programs.	
	Program Architectural Runway	**Architectural Runway (Features by Program) [3-Level]** **Graph:** Shows the roadmap of Enabler Features grouped by Program. **Table:** The table view provides the detailed breakdown of work from Portfolio Epics through team-level work items. Only the Portfolio Epic > Program Epic > Feature part of the traversal tree is required, so this report also shows work in Analysis at the Program level. *Note that, by default, the Portfolio Epic and Program Epic could be Business or Enabler type and all lower-level work items are assumed to be Enabler type. This can be changed via the filters for each Work Item Work Type attribute.*	**Limit Scope:** RTC Portfolio project area, all RTC project areas
Portfolio Execution (Current PI)	**How are we progressing on delivery of Program Epics?**	**Program Epic Progress Report** **Graph**: Shows the set of Program Epics in progress, along with the planned number of Features and the actual number of Features that have been resolved to date. **Table:** Shows details of the breakdown from Program Epic to Feature with hyperlinked work items. This report gives an indication at a point in time as to the progress of Program Epics and alerts to any plan issues. The scope of the results are controlled by the Program Epic PI. By default all PIs on all Program timelines would be included.	**Limit Scope:** All RTC Program and Team project areas (optional) **Program Epic Type:** Program Epic, by default. For Hybrid Programs, specify additional types. (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types. (optional) **Program Epic PI**: Specify PIs to scope the results to a particular Program and/or PI in a Program.
	What is the defined effort for this PI?	**Program Epics: Defined Effort (Story Points)** **Graph:** Displays the defined effort as a sum of Story Points for Program Epics by rolling up the Story Points from Stories: Story > Feature > Program Epic. **Table:** The table shows details from the Program Epic down to the Stories. The links from Program Epic through Story are required, so only those Program Epics that have been planned are displayed.	**Limit Scope:** RTC Portfolio project area, all RTC Program and Team project areas **Program PI:** Current PI

	What is the planned value to be delivered for this PI?	**Planned Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Portfolio project area **Objective Type:** Value Stream **Objective Iteration:** Current PI
Risks and Impediments	**What have the Programs committed that the Portfolio is not tracking?**	**Planned Program Features without associated Program or Portfolio Epic** **Graph:** This report shows the Program Features currently committed for the specified PI that do not have any associated Program or Portfolio Epic, which would indicate misalignment with business strategy.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas **Feature PI:** Current PI in each of the Program timelines (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What active work do the Programs have marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocked link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** All RTC project areas **Blocked Team:** Portfolio, all Programs/Teams
	What work is blocking work of the Programs?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** All projects/teams **Blocking Team:** All projects/teams
	Which Defects are affecting Portfolio quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RTC Portfolio project area, RQM SAFe Portfolio project area, RTC Program and Team project areas **Defect Iteration:** All Backlog iterations on all timelines in scope (Defect is *not* on Backlog)

			(optional) **Status Group Category (Defect [Type: Work Item])**: Unresolved, by default
Trends	What is average achieved value across the Portfolio?	**Portfolio Average Achieved Value [3-Level]** **Graph:** Shows the average of achieved value across the Portfolio at the Program and Team levels. **Table:** Provides details about the PI Objectives and the individual value, including the owner (project/team) of the Objectives.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas
	How well are we estimating effort for the Portfolio work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The <u>actual story points</u> are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Portfolio project area **Work Item Type:** Portfolio Epic (optional) **Work Item Iteration**: Select one or more PIs
	How well are we estimating effort for the Program work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The <u>actual story points</u> are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas **Work Item Type:** Program Epic (optional) **Work Item Iteration**: Select one or more PIs
	How many Features have the Value Streams delivered?	**Portfolio Status [3-Level]** **Graph:** Shows the # of resolved Features for each Value Stream by PI across the Portfolio. **Table:** Shows details.	**Limit Scope:** All RTC project areas (optional) **Program PI:** Specific PIs to scope the result set (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs

Program Reports

In the Program reports, the filters may vary depending upon these factors:

- Teams are in separate RTC project areas – Include those project areas in the scope of the report
- Teams are using processes other than agile – Where team-level work item types are specified, consider that you may need to specify additional types other than just Story

In both of these cases, reports that require the specification of iterations must include the iterations across all timelines, Program-level and Team-level.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Program Overview	How is allocated work aligned with business strategy for the current PI?	**All Committed Team Work (by count) for Active Strategic Themes [3-Level]** **Graph:** Shows the committed Team-level work (number of Stories) being tracked for the current Program Increment for active Strategic Themes. This report is intended to show the distribution of work across the Strategic Themes to ensure the proper balance of investments. **Table:** Shows details of the work broken down by Portfolio Epic > Program Epic > Feature > Story with hyperlinks to all work items.	**Limit Scope:** RTC Portfolio project area, RDNG SAFe Portfolio project area, RTC Program and Team project areas in scope **Featire PI:** Set to current PI (Program Increment). Expand the scope by specifying additional past PIs (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs (optional) **Story Type:** Default is Story. Set to appropriate work item type for non-agile Teams
	What are the Program's Teams working on?	**Program Roadmap (by Team, by PI)** **Graph:** Shows the # of Stories for each Feature on the Program roadmap or on the backlog, grouped by Team and Feature PI. **Details:** Includes the results grouped by Feature with associate PI Objectives for Team work items.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs (optional) **Story Type:** Story, by default. Specify additional types to support hybrid Teams
	Program Architectural Runway	**Architectural Runway (Features by Program) [3-Level]** **Graph:** Shows the roadmap of Enabler Features grouped by Program. **Table:** The table view provides the detailed breakdown of work from Portfolio Epics through team-level work items. Only the Portfolio Epic > Program Epic > Feature part of the traversal tree is required, so this report also shows work in Analysis at the Program level. *Note that, by default, the Portfolio Epic and Program Epic could be Business or Enabler type and all lower-level work items are assumed to be Enabler type. This can be changed via the filters for each Work Item Work Type attribute.*	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope

Current Program Increment (PI) Progress	What is ready to be demonstrated?	Ready for System Demo [Value Stream/Program/Team] Table: Shows work items completed and ready for a System Demonstration. Limit the scope to a Value Stream, Program or Team by setting the PI Objective type appropriately.	Limit Scope: RTC Program and Team project areas in scope PI Objective Type: Team, by default. Specify Program or Value Stream to see what is ready to be demonstrated at those levels
	What is the planned value to be delivered for this PI?	Planned Business Value for [Value Stream/Program/Team] Graph: Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. Table: Provides details, including the percentage of achieved value.	Limit Scope: RTC Program and Team project areas in scope Objective Type: Program, Team Objective Iteration: Current Program PI and all of the Team iterations within that PI
	How are the Teams progressing against the plan?	Story Progress Report Graph: Shows the count of Stories achieved, in progress and remaining by Team for the Program and Iteration scope specified. Table: Shows break down from Program Features to Stories with hyperlinked work items. This report can be used to show all Programs or just Teams within a specific Program. It can also be used to show specific iterations for the Story.	Limit Scope: RTC Program and Team project areas in scope Team Iteration: All Team iterations within the current Program PI Feature PI: Current Program PI (optional) Story Type: Story, by default. For Hybrid Programs, specify additional types (optional) Feature Type: Feature, by default. For Hybrid Programs, specify additional types
	What is the Feature progress?	Feature Progress Report Graph: Shows the set of Features in progress, along with the planned number of stories and the actual number of stories that have been resolved to date. Table: Shows details of the breakdown from Feature to Story with hyperlinked work items. This report gives an indication at a point in time as to the progress of Features and alerts to any plan issues.	Limit Scope: RTC Program and Team project areas in scope Feature PI: Current Program PI (optional) Story Type: Story, by default. For Hybrid Programs, specify additional types (optional) Feature Type: Feature, by default. For Hybrid Programs, specify additional types

	What is the defined effort for this PI?	**Features: Defined Effort (Story Points) [3-Level]** **Graph:** Displays the defined effort as a sum of Story Points for Features by rolling up the Story Points from Stories: Story > Feature. **Table:** Shows details from the Portfolio Epic down to the Stories. The links from Portfolio Epic through Story are required, so only those Features that have been planned are displayed.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope **Feature PI**: Set to the current Program Increment
Risks and Impediments	**What has this Program committed that the Portfolio is not tracking?**	**Planned Program Features without associated Program or Portfolio Epic** **Graph:** This report shows the Program Features currently committed for the specified PI that do not have any associated Program or Portfolio Epic, which would indicate misalignment with business strategy.	**Limit Scope:** RTC Portfolio project area, RTC Program and Team project areas in scope **Feature PI**: Current PI for Program in scope (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs
	What active work does my Program have marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocked link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** RTC Program and Team project areas in scope **Blocked Team:** Program and Teams
	What work is blocking work of my Program?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** Program and Teams in scope **Blocking Team:** All other Programs, Teams (and Portfolio. if desired) in scope
	What work is blocked by my Program?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends	**Limit Scope:** All RTC project areas **Blocked Team:** All other Programs, Teams (and Portfolio, if desired) in scope **Blocking Team:** Program and Teams in scope

		on/blocks link articulated between the blocking and blocked work items.	
	Which Defects are affecting Program quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RQM SAFe Portfolio project area, RTC Program and Team project areas in scope **Defect Iteration:** Backlog iteration on Program (and Team) timeline (Defect is *not* on Backlog) (optional) **Status Group Category (Defect [Type: Work Item]):** Unresolved, by default
Trends	**How is my Program doing on value delivery?**	**Average Achieved Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Program and Team project areas in scope **Objective Type:** Program, Team
	How well are we estimating effort for the Program work?	**Estimated vs Actual Story Points** **Graph:** Shows the set of Work Items with estimated and actual Story Points graphed side-by-side for comparison. **Table:** Shows the hyperlinked work items by targeted iteration along with the work item type, status and estimated and actual story points. *Note: This is not a roll-up or aggregation. The actual story points are manually entered at the moment into the work item attribute.*	**Limit Scope:** RTC Program and Team project areas in scope **Work Item Type:** Feature (optional) **Work Item Iteration:** Select one or more PIs.
	How many Features have the Programs delivered?	**Portfolio Status [3-Level]** **Graph:** Shows the # of resolved Features for each Program by PI across the Portfolio. **Table:** Shows details.	**Limit Scope:** RTC Program and Team project areas in scope (optional) **Program PI:** Specific PIs to scope the result set (optional) **Feature Type:** Feature, by default. Specify additional types to support hybrid Programs

	Are we improving our velocity?	[JRS ready-to-use report – OOTB] **Team Velocity** Shows the number of story points completed in each iteration.	**Project:** RTC Program and Team project areas in scope **Timeline:** Project timeline(s) **Team:** All Teams in scope

Team Reports

Many of the reports on the Team Dashboard are simply Program-level reports with the scoping set for the specific Team. Other reports are delivered with JRS out of the box.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Scrum Master	**Which stories require attention?**	[JRS ready-to-use report – OOTB] **Incomplete stories (table and graph)** Shows the stories targeted to the current iteration that have not been completed.	**Project:** RTC Program and Team project areas in scope **Team:** Team in scope
	Which Defects are affecting Team quality?	**Unresolved Defects by Program** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RQM SAFe Portfolio project area, RTC Program and Team project areas in scope **Defect Iteration:** Backlog iteration for Team in scope (Defect is *not* on Backlog) (optional) **Status Group Category (Defect [Type: Work Item]):** Unresolved, by default
	How are we progressing against the plan?	**Story Progress Report** **Graph:** Shows the count of Stories achieved, in progress and remaining by Team for the Program and Iteration scope specified. **Table:** Shows break down from Program Features to Stories with hyperlinked work items. This report can be used to show all Programs or just Teams within a specific Program. It can also be used to show specific iterations for the Story.	**Limit Scope:** RTC Program and Team project areas in scope **Team Iteration:** All Team iterations within the current Program PI **Feature PI**: Current Program PI (optional) **Story Type:** Story, by default. For Hybrid Programs, specify additional types (optional) **Feature Type:** Feature, by default. For Hybrid Programs, specify additional types
	What is the current status?	[JRS ready-to-use report – OOTB] **Burndown by Story Points** Shows the number of story points assigned to work items that are either open or in progress over daily intervals. [JRS ready-to-use report – OOTB] **Burnup by Story Points** Shows the number of story points associated with completed work over daily intervals.	**Project:** RTC Program and Team project areas in scope **Iteration:** Team iteration **Team:** Team in scope

	What has my Team marked as "blocked"?	**Active "Soft" Dependencies** **Table:** Shows all work blocked using the "blocked" attribute for active (i.e. unresolved) work items. Use the Work Item Type and/or Project/Team filters to scope the results to a specific Portfolio, Value Stream, Program or Team. Soft dependencies are those identified during the planning process as opposed to using the depends on/blocks link which would require block work items to already be articulated. The reason for the blockage, if specified, is provided.	**Limit Scope:** RTC Program and Team project areas in scope **Blocked Team:** Team in scope
	What work is blocking work of my Team?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** Team in scope **Blocking Team:** All other Programs, Teams (and Portfolio, if desired) in scope
	What work is blocked by my Team?	**Active "Hard" Dependencies** **Table:** Show all active (i.e. unresolved) hard dependencies across the Portfolio at the Value Stream, Program and Team levels. Optionally, resolved blocking work can also be shown. To limit the scope, specify the blocking and/or blocked teams. Hard dependencies are those with the depends on/blocks link articulated between the blocking and blocked work items.	**Limit Scope:** All RTC project areas **Blocked Team:** All other Programs, Teams (and Portfolio, if desired) in scope **Blocking Team:** Team in scope
Product Owner	**What are we ready to demonstrate?**	**Ready for System Demo [Value Stream/Program/Team]** **Table:** Shows work items completed and ready for a System Demonstration. Limit the scope to a Value Stream, Program or Team by setting the PI Objective type appropriately.	**Limit Scope:** RTC Program and Team project areas in scope **Owning Team:** Team in scope
	Are we improving our value delivery?	**Average Achieved Business Value for [Value Stream/Program/Team]** **Graph:** Shows the number of PI Objectives with achieved business value for Value Stream, Program and/or Team by specifying the PI Objective Type. Each bar on the graph represents a count of PI Objectives for a given actual value. Results are grouped by Project/Team. **Table:** Provides details, including the percentage of achieved value.	**Limit Scope:** RTC Program and Team project areas in scope **PI Objective Type:** Team **Team:** Team in scope
	Are we improving our velocity?	**[JRS ready-to-use report – OOTB]** **Team Velocity** Shows the number of story points completed in each iteration.	**Project:** RTC Program and Team project areas in scope **Timeline:** Project timeline(s)

			Team: Team in scope
What is the Feature progress?	Feature Progress Report Graph: Shows the set of Features in progress, along with the planned number of stories and the actual number of stories that have been resolved to date. Table: Shows details of the breakdown from Feature to Story with hyperlinked work items. This report gives an indication at a point in time as to the progress of Features and alerts to any plan issues.	Limit Scope: RTC Program and Team project areas in scope Feature PI: Current Program PI (optional) Story Type: Story, by default. For Hybrid Programs, specify additional types (optional) Feature Type: Feature, by default. For Hybrid Programs, specify additional types	

Appendix: Older SAFe and CLM Versions

Importing the SAFe Reports

In the following sections, instructions for importing the applicable SAFe archive files into your CLM environment are described, grouped by CLM version.

Please follow the instructions that match your version of CLM!

CLM 6.0.1

Required CLM (RTC, RDNG, RQM, JRS) version: 6.0.1
Applicable SAFe Archive(s): SAFe 3.0 Reports (6.0.1)
Note: CLM 6.0.1 supports SAFe 3.0 for Program and Portfolio in RTC, RDNG and RQM

*Note: If you are using the SAFe 4.0 "beta" templates in a 6.0.1 environment, please follow the instructions in the **CLM 6.0.2** section above to prepare your environment. You can import the SAFe 4.0 reports for 6.0.2 but there may be issues related to data warehouse metadata schema changes. Many of the reports will import successfully.*

Follow these instructions to import reports in the *applicable SAFe archive* into your JRS 6.0.1 environment. Note that the creation of project areas across all CLM components is optional, but you may encounter errors during import if you do not have a complete environment.

1. If you do not already have a CLM 6.0.1 environment with SAFe project areas, create a sample set of metadata for the Portfolio and/or Program levels:
    a. Install CLM 6.0.1 with the JRS feature and follow the instructions to configure your environment via /jts/setup.

b. Create project areas using the SAFe template(s):

- **[SAFe Program] RTC**
  - v. On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates**
  - **vi.** Create a new SAFe Program project area based on the SAFe Program process template
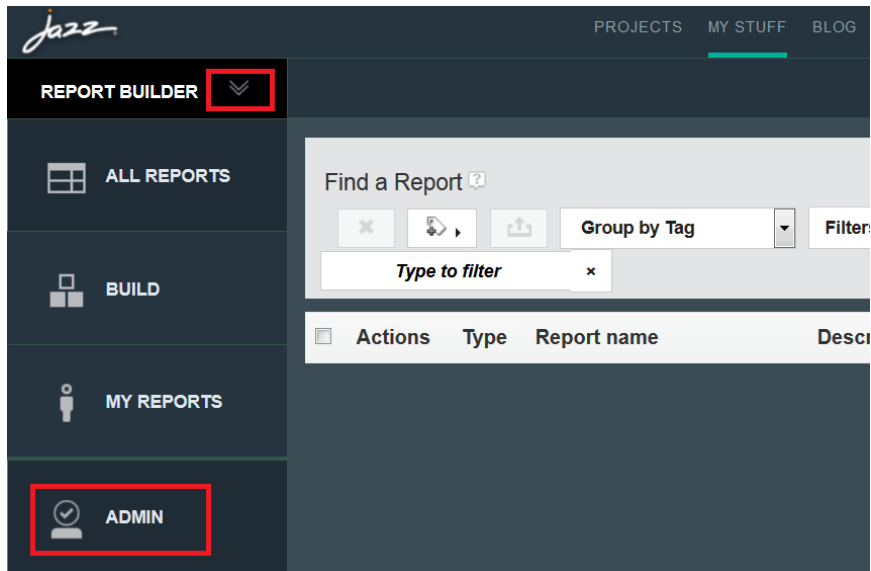

Note: Associations between the Portfolio and Program project areas in RTC must be defined manually but they are not required for the reports to import successfully… only for them to execute successfully.

- **[SAFe Portfolio] RTC**
  - vii. On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates** (if you haven't already done this above)
  - **viii.** Create a new SAFe Portfolio project area based on the SAFe Portfolio process template
- **[SAFe Portfolio] RDNG**
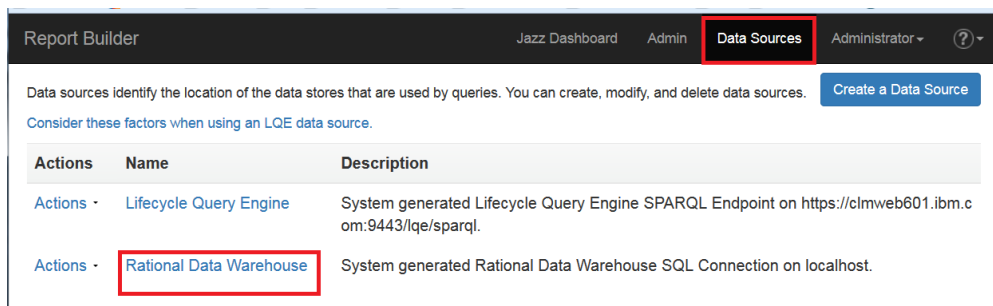 - i. Create a Portfolio project area based on the SAFe project template:

    Hint: you must go to the /rm/web URL and select Create Project Area from the administration menu.
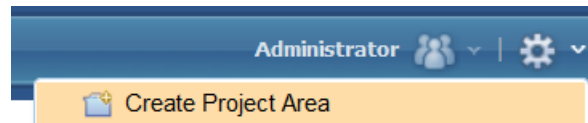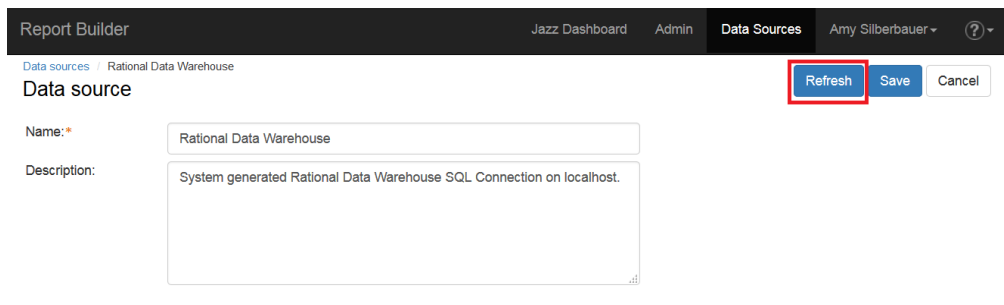

- **[SAFe Portfolio] RQM**
  - i. On the RQM Application Administration page, navigate to Templates and then **Deploy Predefined Templates**
  - **ii.** Create a new SAFe Portfolio project area based on the SAFe Portfolio process template

c. Create one artifact based on each of the SAFe-unique artifact types:

- **[SAFe Portfolio, SAFe Program] RTC:** Portfolio Epic, Program Epic, Feature, PI Objective
- **[SAFe Portfolio] RDNG:** Strategic Theme, Value Stream, Lightweight Business Case (with attributes)

d. Run data collection via the Data Collection application:

- Launch DCC in your browser: https://<host>:<port>/dcc/web
- Click **Run all data warehouse collection jobs**
- Ensure all jobs complete successfully

e. Refresh your JRS data warehouse Data Source:

- Launch JRS in your browser: https://<host>:<port>/rs
- Click the **Report Builder** menu drop-down, then **Admin**:

- Click **Data Sources** and select the appropriate data source to refresh:

- Edit the data warehouse data source and click **Refresh**:

    f.   Click **Report Builder** to return to the report builder user home page.

2.   Import the SAFe reports:

    a.   Click **Admin.**

    b.   In **Import ready-to-use reports**, select **Optional: Import additional reports such as those provided by IBM, business partners, or others**.

    c.   Browse to the location where you have downloaded the **SAFe 3.0 (6.0.1)** archive file. Click OK.

CLM 6.0

**Required CLM (RTC, RDNG, RQM, JRS) version:** 6.0
Applicable SAFe Archive(s): SAFe 3.0 Reports (6.0)
*Note: CLM 6.0 supports SAFe 3.0 Programs in RTC only*

Follow these instructions to import reports in the *applicable SAFe archive* into your 6.0 JRS environment:

1. If you do not already have a CLM 6.0 environment with a SAFe Program project area, create one and add a sample set of metadata:
    a. Install CLM 6.0 with the JRS feature and follow the instructions to configure your environment via /jts/setup.
    b. Create a SAFe Program project area using the SAFe process template:
        - On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates**
        - Create a new SAFe Program project area based on the SAFe Program process template
    c. Create one artifact based on each of the SAFe-unique artifact types: Program Epic, Feature, PI Objective
    d. Run data collection via the Data Collection application:
        - Launch DCC in your browser: https://<host>:<port>/dcc/web
        - Click **Run all data warehouse collection jobs**
        - Ensure all jobs complete successfully
    e. Refresh your JRS data warehouse Data Source:
        - Launch JRS in your browser: https://<host>:<port>/rs
        - Click the **Report Builder** menu drop-down, then **Admin**:

Note: Your screens may not look exactly like these…
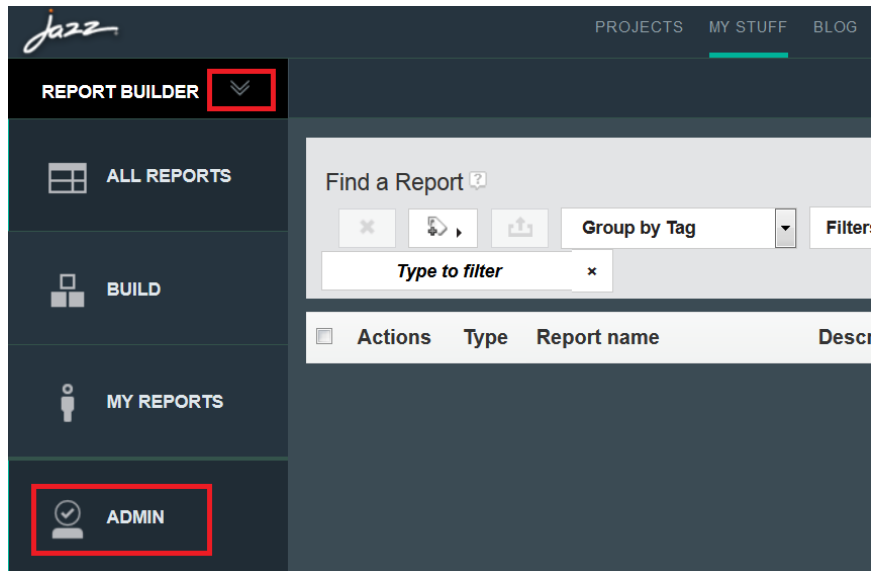
- Click **Data Sources** and select the appropriate data source to refresh:
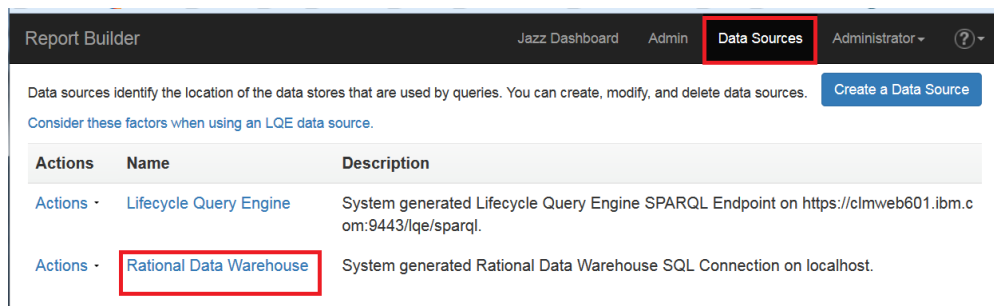
- Edit the data warehouse data source and click **Refresh**:
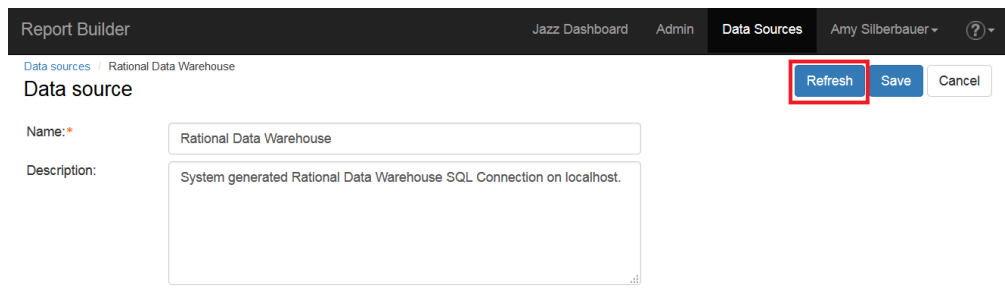
  f. Click **Report Builder** to return to the report builder user home page.

2. Import the SAFe reports:

  a. Click **Admin.**

  b. In **Import ready-to-use reports**, select **Optional: Import additional reports such as those provided by IBM, business partners, or others**.

  c. Browse to the location where you have downloaded the **SAFe 3.0 Reports (6.0)** archive file. Click OK.

Troubleshooting

JRS will attempt to import all of the reports in the archive. If it cannot successfully do that, the reports that can be imported will be. Depending on the version of CLM in use, JRS will let you know which reports imported successfully and which failed.

If you encounter errors during the import of SAFe reports, first ensure that you have followed all instructions above to prepare your environment before the import. Here are some general reasons why your import may result in an error:

1. **You are using RTC only, not RDNG or RQM.** In this case, the reports that require RDNG or RQM will not import successfully. The RTC-only reports will import without error.
2. **You have created an RTC Program project area, but nothing for the Portfolio.** In this case, the Portfolio-specific reports will not import successfully, but the Program-level reports will import without error.
3. **You have deployed CLM 6.0 or 6.0.1 and have not created any sample data.** The reports rely on updated metadata in the data warehouse, which occurs as a result of having sample work items and other artifacts that have been collected in the data warehouse. Without that metadata, some of the reports will not import successfully.
4. **You have not created any project areas (any level of CLM).** As described above, metadata must be in the data warehouse. This most easily is done through creation of project areas (and in versions of CLM before 6.0.2, the creation of sample data is also required).

Troubleshooting (6.0.1)

Other known issues that may cause errors during import are related to enhancements in 6.0.1 that you may not have in your environment. The SAFe reports for 6.0.1 assume the following:

- You are using the SAFe 3.0 templates delivered in CLM 6.0.1
- You are running a 6.0.1 environment for CLM (including Jazz Reporting Service)

If you have upgraded to CLM 6.0.1 but your project areas were established using pre-6.0.1 SAFe templates (including ones you have created yourself), you may have issues with some reports that expect updates provided in 6.0.1. Following are expected errors you may see:

Import completed with errors	11:11:53 AM	✕

The following reports were imported successfully:

Program Roadmap, Features in [Program PI], What are the dependencies within my [Program/Team]?, All Team Work by State for [Program], Which Programs block work of [Program]?, Ready for System Demo [scoped by], Status of Teams' Support for Features, Program Increment Progress, Which defects are affecting Program quality?

There were errors during the import. Some things to consider:
Does the report use custom attributes that do not exist in the current datasource?
Does the report contain a manual query that is not valid for the current datasource?

Business Value Delivery for [Program]	An SQL exception occurred when validating the SQL generated from the report (see the log file for the query string causing the exception).
All Team Work by Iteration for [Program]	An SQL exception occurred when validating the SQL generated from the report (see the log file for the query string causing the exception).
Blocked Work for [Program/Team]	CRRGW6009E There is a condition for an attribute CM:RIDW.VW_REQUEST.ext_com.ibm.team.apt.attribute.planitem.blocked that does not exist in the metamodel.
[Program/Team] Business Value Achieved	An SQL exception occurred when validating the SQL generated from the report (see the log file for the query string causing the exception).

These reports rely on new attributes added to work item types:

- PI Objective: **% Achieved Value**
- All work item types: **Blocked**

SAFe 3.0 Reports (6.0.1)

The tables below describe the set of SAFe Portfolio and ART metrics suitable for the associated SAFe 3.0 levels and roles. Each table describes:

- **Dashboard Tab**: Guidance on the most suitable dashboard tab for the report widget, based on SAFe level and the role(s) likely to consume the report information
- **Answers the question…** : Description of what question the reports answers
- **Report Name & Description:** The report name (which can be used to find the report in Report Builder) along with a brief description
- **Filters:** A high-level description about how to set the filters

Portfolio Reports

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Portfolio Overview	**How is Portfolio capacity allocated across Strategic Themes?**	**Allocated Capacity by Strategic Theme** **Graph:** Shows the actual allocation of capacity (percentage) across all Strategic Themes for the current budget cycle. **Table:** Shows details of the budgeted and allocated capacity and investment in the table.	**Limit Scope:** RDNG SAFe Portfolio project area
	What has been "pulled" for implementation?	**Portfolio Roadmap for [Program]** **Graph:** Shows the # of Features on the roadmap for each Program that are either in progress or complete **Table:** Details grouped by Portfolio Epic by Portfolio Epic	**Limit Scope:** RTC Portfolio project area, all RTC Program project areas in Portfolio
Portfolio Planning	**What are the Programs' Teams working on?**	**All Team Work for Portfolio** **Graph:** Shows the count of all work (resolved/unresolved) Team-level work across the Programs in the Portfolio by Program. **Table:** Shows all team-level work, its status and alignment to the Program Epics through Features.	**Limit Scope:** RTC Portfolio project area, all RTC Program project areas in Portfolio **Type:** (required but should be automatically set by the project areas in scope)
Risks and Impediments	**Which Programs block work of Program X?**	**[SAFe Program Report]** **Which Programs block work of [Program]?** **Table:** Shows all Work Items that block work for [Program], along with status and Program/Team that is blocking. Use one of these widgets *per Program*. Alternatively, use the newer **Active "hard" Dependencies** report, which can be configured to show all Programs.	**Limit Scope:** All RTC Program project areas **Blocked Project:** RTC Program project area that is blocked **Blocker Project:** All other RTC project areas in scope (i.e not the Blocked Project)

	Which Defects are affecting Portfolio quality?	**Which Defects are affecting Portfolio quality?** **Graph:** Shows Defects by severity that are not resolved or on the backlog, grouped by Program, with their associated Test Plan, if any. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RTC Portfolio project area, RQM SAFe Portfolio project area, all RTC Program project areas in Portfolio **Defect Planned For:** (this is actually an **is not planned for** filter) Specify all Backlog iterations for All RTC project areas in scope
Trends	**What is the actual value delivered across the Portfolio?**	**[SAFe Program Report]** **Business Value Delivery for [Program]** **Graph:** Shows business value achieved across the Portfolio to-date by averaging the achieved value of resolved Program PI Objectives across Programs within the specified scope. **Table:** Enables user to click on average to see the individual PI Objectives and their achieved value that was used in the calculation.	**Limit Scope:** All RTC Program project areas in Portfolio
	What is the average achieved value for the Portfolio?	**Portfolio Business Value Achieved** **Graph:** Shows average % of achieved value by Program across the Portfolio. **Table:** Enables drill-down into each Programs % achieved value to view PI Objectives, planned and actual value.	**Limit Scope:** RTC Portfolio project area, all RTC Program project areas in Portfolio
	How many Features have been resolved?	**Portfolio Status** **Graph:** Shows number of Features that have been resolved across Programs in the Portfolio. **Table:** Shows details.	**Limit Scope:** RTC Portfolio project area, RQM SAFe Portfolio project area, all RTC Program project areas in Portfolio **Program Epic PI:** All PIs for all Program project areas in scope.

Program Reports

In the Program reports, the filters may vary depending upon these factors:

- Teams are in separate RTC project areas – Include those project areas in the scope of the report
- Teams are using processes other than agile – Where team-level work item types are specified, consider that you may need to specify additional types other than just Story

In both of these cases, reports that require the specification of iterations must include the iterations across all timelines, Program-level and Team-level.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Program Overview	**What has been "pulled" for implementation?**	**Program Roadmap** **Graph:** Shows number of Team-level work items associated with a Program Epic grouped by PI. **Table:** Shows details, including the Feature and Team iterations for Features and Team Work Items, respectively.	**Limit Scope:** RTC Program project area* **Type:** (should be automatically set by project area scope)**

			*If Teams are in separate RTC project areas, includes those in scope ** For multi-speed IT, team-level work items may be other than Story
Program Details	**What are the Teams working on?**	**All Team Work by State for [Program]** **Graph:** Shows the count of all Team-level work by state for the Program. **Table:** Shows details of Team-level work related to Feature and Program Epics by PI.	**Limit Scope:** RTC Program project area* **Type:** (should be automatically set by project area scope)** *If Teams are in separate RTC project areas, includes those in scope ** For multi-speed IT, team-level work items may be other than Story
	How is the Teams' work dispersed across PIs?	**All Team Work by Iteration for [Program]** **Graph:** Shows count of all team-level work grouped by team in all Program Increments. **Table:** Shows detailed breakdown from Feature to Team-level work and includes Team PI Objectives.	**Limit Scope:** RTC Program project area* **Feature PI:** All PIs for the Program in scope
Current Program Increment (PI) Progress	**What is ready to be demonstrated to the Program team?**	**Ready for System Demo [scoped by]** **Table:** Shows PI Objectives ready for system demonstration with associated contributing work item(s) grouped by iteration. **Graph:** Shows count of PI Objectives ready for System Demo grouped by iteration with owning team(s)..	**Limit Scope:** RTC Program project area* **Type:** (should be automatically set by project area scope)** *If Teams are in separate RTC project areas, includes those in scope ** For multi-speed IT, team-level work items may be other than Story
	How are the teams doing on value delivery?	**Business Value Delivery for [Program]** **Graph:** Shows actual business value delivery by count of PI Objectives for specified scope grouped by Program/Team. **Table:** Shows details with PI Objectives, Program/Team and actual, planned and achieved value. Results shown are based on resolved PI Objectives.	**Limit Scope:** RTC Program project area* **PI Objective Type:** Program, Team *If Teams are in separate RTC project areas, includes those in scope
	How are the Teams progressing against the plan?	**Program Increment Progress** **Graph:** Shows the number of resolved and unresolved team-level work items for the current PI by Team. **Table:** Shows details of the Team work with target iteration and related Feature.	**Limit Scope:** RTC Program project area* **Type:** (should be automatically set by project area scope)** **Planned For:** Current PI for Program in scope *If Teams are in separate RTC project areas, includes those in scope ** For multi-speed IT, team-level work items may be other than Story
	When will Features be delivered?	**Status of Teams' Support for Features** **Graph**: Shows the count of team-level work grouped by status for each Feature. **Table**: Shows details of the Feature and related Stories.	**Limit Scope:** RTC Program project area* **Planned For:** Current PI for Program in scope *If Teams are in separate RTC project areas, includes those in scope

Risks and Impediments	Are my Teams blocking each other?	**What are the dependencies within my [Program]?** Show any interdependencies across Teams within a Program scope along with the status.	**Limit Scope:** RTC Program project area* **Status Group:** (optional) Defaults show all dependencies (resolved and unresolved) Blocker Team: Team in s *If Teams are in separate RTC project areas, includes those in scope
	Which Programs block work of my Program?	**Which Programs block work of [Program]** Shows any dependencies the Blocked Program has on other Programs.	**Limit Scope:** RTC Program project areas in Portfolio* **Blocked Project:** RTC Program project area that is blocked* **Blocker Project:** All other RTC project areas in scope (i.e not the Blocked Project)* *If Teams are in separate RTC project areas, includes those in scope
	Which Programs does my Program block?		**Limit Scope:** RTC Program project areas in Portfolio* **Blocked Project:** All other RTC project areas in scope (i.e not the Blocker Project)* **Blocker Project:** RTC Program project area that is blocking* *If Teams are in separate RTC project areas, includes those in scope
	Which Defects are affecting Program quality?	**Which Defects are affecting Program quality?** **Graph:** Shows the count of Defects by severity that are not resolved or on the backlog. **Table:** Shows details including target iteration and associated test plan that raised the defect.	**Limit Scope:** RTC Program project area, RQM SAFe Portfolio project area* **Planned For:** (this is actually an **is not planned for** filter) Specify all Backlog iterations for All RTC project areas in scope *If Teams are in separate RTC project areas, includes those in scope
Trends	Is the Program improving its ability to deliver value?	**[Program/Team] Business Value Achieved** **Graph:** Shows % Achieved Value grouped by Program Increment for resolved objectives. **Table:** Shows details of the PI Objectives and associated work delivered to achieve value.	**Limit Scope:** RTC Program project area* **PI Objective Type:** Program *If Teams are in separate RTC project areas, includes those in scope
	Are the Teams improving their ability to deliver value?		**Limit Scope:** RTC Program project area* **PI Objective Type:** Team *If Teams are in separate RTC project areas, includes those in scope

	Are we improving our velocity?	**[JRS ready-to-use report – OOTB]** **Team Velocity** Shows velocity of all teams across the program by iteration	**Project:** RTC Program project area* **Timeline:** Project timeline* **Team:** All Teams *If Teams are in separate RTC project areas, includes those in scope

Team Reports

Many of the reports on the Team Dashboard are simply Program-level reports with the scoping set for the specific Team. Other reports are delivered with JRS out of the box.

Dashboard Tab	Answers the question…	Report Name & Description	Filters
Scrum Master	**What is the current status?**	**[JRS ready-to-use report – OOTB]** **Burndown by Story Points** Shows the number of story points assigned to work items that are either open or in progress over daily intervals.	**Project:** RTC Program project area* **Iteration:** Team iteration* **Team:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
		[JRS ready-to-use report – OOTB] **Burnup by Story Points** Shows the number of story points associated with completed work over daily intervals.	
	How are we doing on Feature delivery?	**Status of Teams' Support for Features Graph:** Shows the status of all team-level work toward delivery of Features scoped by the specified Program and Program Increment. This report can be used to show Feature delivery status for all teams in a Program or for a specific Team. **Table:** Shows details of the Team-level work.	**Limit Scope:** RTC Program project area* **Planned For:** Current PI for Program in scope **Child Filed Against:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
	What stories require attention?	**[JRS ready-to-use report – OOTB]** **Incomplete stories (table and graph)** Shows the stories targeted to the current iteration that have not been completed.	**Project:** RTC Program project area* **Team:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
	What is the status of our defects?	**[JRS ready-to-use report – OOTB]** **Defects by priority and team (graph and table)** Shows a graph of open defects, grouped by priority and team. The table groups defects by project, priority, and team, and shows details about each defect.	**Project:** RTC Program project area* **Team:** Team in scope **Filed Against:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
	What is blocked by my Team?	**Which Programs block work of [Program]** Shows any dependencies the Blocked Team has on other Teams in the same Program.	**Limit Scope:** RTC Program project area* **Blocked Project:** All other RTC project areas in scope (i.e not the Blocker Team's Project)* **Blocker Project:** RTC Program project area that is blocked *

			*If Teams are in separate RTC project areas, includes those in scope
	What is blocking my Teams work?		**Limit Scope:** RTC Program project area* **Blocked Project:** RTC Program project area that is blocked* **Blocker Project:** All other RTC project areas in scope (i.e not the Blocked Project)* *If Teams are in separate RTC project areas, includes those in scope
	What has my Team marked "blocked"?	**Blocked Work for [Program/Team]** Shows the work items marked as "blocked" (as opposed to, or in addition to, using the depends on/blocks link).	**Limit Scope:** RTC Program project area* **Filed Against:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
Product Owner	**Are we improving our value delivery?**	**[Program/Team] Business Value Achieved** **Graph:** Shows % Achieved Value grouped by Program Increment for resolved objectives. **Table:** Shows details of the PI Objectives and associated work delivered to achieve value.	**Limit Scope:** RTC Program project area* **PI Objective Type:** Team **Filed Against:** Team in scope *If Teams are in separate RTC project areas, includes those in scope
	What are we ready to demonstrate?	**Ready for System Demo [scoped by]** **Table:** Shows PI Objectives ready for system demonstration with associated contributing work item(s) grouped by iteration. **Graph:** Shows count of PI Objectives ready for System Demo grouped by iteration with owning team(s)..	**Limit Scope:** RTC Program project area* **Type:** (should be automatically set by project area scope)** **PI Objective Iteration:** Iteration for team in scope for current PI **Owning Team:** Team in scope *If Teams are in separate RTC project areas, includes those in scope ** For multi-speed IT, team-level work items may be other than Story
	Are we improving our velocity?	**[JRS ready-to-use report – OOTB]** **Team Velocity** Shows velocity of the specified team	**Project:** RTC Program project area* **Timeline:** Project timeline* **Team:** Team in scope *If Teams are in separate RTC project areas, includes those in scope

SAFe 3.0 Reports (6.0)

In each table, **blue** rows indicate the reports that will be provided in the separately downloadable archives. The reports that come out of the box with JRS are reflected in **green**. If the out-of-the-box JRS report is also available in CLM V5.0.2, that is indicated in the table for that report.

Team Reports

Report	Description	Answers the question…	Suggested Dashboard Tab	Available in CLM 5.0.2?
Burndown by Story Points	Number of story points assigned to work items that are either open or in progress over daily intervals	Are we behind? How much are we behind?	Scrum Master	
Burnup by Story Points	Number of story points associated with completed work over daily intervals	Are we green, yellow, orange?	Scrum Master	
Changes to Time Spent	Work items where the time spent has been updated within the last 7 days	Why are we behind? What is at risk?	Scrum Master	Yes
Defects by Priority Chart (List)	Total number of defects by priority	Are we improving our quality?	Scrum Master	
Incomplete Stories	Stories targeted for current iteration that are still incomplete	What is behind?	Scrum Master	Yes
Iteration Health	Visualization based on various statistics that can be used to interpret the health of the current iteration filtered by timelines	Are we green, yellow, orange?	Product Owner	Yes
Release Status Chart (List)	Number of open and closed stories for a release	Are we green, yellow, orange?	Product Owner	Yes
Scope Added	Work added to the current iteration scope after iteration start	Why are we behind?	Scrum Master	Yes
Scope Removed	Work removed from the current iteration scope after iteration start	Why are we behind?	Scrum Master	Yes
Team Dependencies	List of open work items blocked by another team's open work items	What is at risk?	Scrum Master	Yes
Team Velocity	Number of story points completed in each iteration	How well did we do?	Product Owner	Yes
All [scope to] Team Stories	Bottoms-up view of Stories with objectives, aligned to Features for the specific Team	What capabilities have we delivered? What capabilities are we delivering? Is all of the Team's work aligned to business value?	Scrum Master	

Program Reports

Report	Description	Answers the question…	Suggested Dashboard Tab
All [scope to] Team Stories (Program View)	Bottoms-up view of Stories with objectives, aligned to Features for the specific Team. If no Team is specified, the scope of results is the Program level.	What capabilities have we delivered? What capabilities are we delivering? Is all of the Team's work aligned to business value?	Program Details
Business Features By Status for [select PI]	Shows business features by status for the specified Program Increment. If no PI is specified, the scope is all PIs for the Program.	Are we improving our value delivery? What value are we delivering?	Current Program Increment (PI) Planning
Features By Type for [select PI]	Pie chart that shows percentage of Features by type for the specified Program Increment. If no PI is specified, the scope is all PIs for the Program.	How much architectural risk does this PI have? Do we have a reasonable balance of architecture and business work?	Risks and Impediments
Features with Child Story Status for [select PI]	This report displays a bar chart showing, by Feature, the status of each of its child stories. The report is scoped to a Program Increment. If no PI is specified, the scope is the Program roadmap.	What is the status of the Program Increment? What is behind?	Current Program Increment (PI) Planning
Ready for System Demo	List of Features completed, along with related PI Objectives, that are ready for a System Demonstration	What value can we demonstrate?	Current Program Increment (PI) Planning
PI Objectives in Progress	Shows PI Objectives for Features related to Team Stories current in progress	What value do we have planned to deliver in this PI?	Current Program Increment (PI) Planning
Cross-Team Dependencies	Shows cross-team dependencies from the perspective of the dependent work item.	Where do we have dependencies? Where are we blocked?	Risks and Impediments
Program Roadmap (V6.0.1)	Shows all Program Epics on the timeline with Features and Stories by iteration.	What is our status and what is on the Roadmap?	Program Overview
PI Objectives Performance (V6.0.1)	Shows PI Objectives performance for Program over time as measure of business value planned vs achieved	How well are we doing as a Program in delivering on business value?	Trends
Team Velocity	Shows Team Velocity for all teams across the program (if no Teams are specified)	How well is the Program executing? What is it's velocity across all Teams?	Trends

Report Descriptions

Report: All [scope to] Team Stories

This report shows a bottoms-up view of Stories with Team PI Objectives, aligned to Features for a specific team. We provide both list (default) and graphical views.

By default, this report is scoped to the Program, which means that it shows stories for all Teams within the Program. To use this report for a specific team, use ▼ **Filters** set the desired Team scope using the **Story Filed Against** attribute.

Report: Business Features by Status for [select PI]

This report shows the set of Business Features in each of the possible states for a specific Program Increment. We provide both list (default) and graphical views.

By default, the report is scoped to all Program Increments on the Agile Release Train. To scope the report to a specific Program Increment, use ▼ **Filters** to set the desired Program Increment using the **Planned For** attribute.

Report: Cross-Team Dependencies

This report shows cross-team dependencies from the perspective of Stories that have Depends On relationships to other work items. The status of the blocking Story is specified as well to provide dependency status.

By default, this report is scoped to the Program so it shows results across all Teams. It also is not limited to a specific Program Increment. There are multiple filters you may want to apply to this report:

- Limit the *scope by status* using the **Dependency Status** attribute
- Limit the *scope by Team Iteration or Program Increment* using the **Story Planned For** attribute
- Limit the *scope by Team* using the **Story Filed Against** or **Dependency Filed Against** attribute (or both)

Report: Features by Type for [select PI]

This report shows Features by type (Architectural or Business) for a Program Increment. We provide both a graphical (default) pie chart and a list view.

By default, this report is scoped to all Program Increments for the selected Program(s). To scope the report to a specific Program Increment, use ▼ **Filters** to set the desired Program Increment using the **Planned For** attribute.

Report: Features with Child Story Status for [select PI]

This report shows the Features for a specific Program Increment and the status of their child stories. We provide both graphical (default) and list views.

By default, the report is scoped to all Program Increments for the selected Program(s). To scope the report to a specific Program Increment, use ▼ **Filters** to set the desired Program Increment using the **Feature Planned For** attribute.

Report: PI Objectives in Progress

This report shows Program PI Objectives for Features related to Team Stories currently in progress. The breakdown of Features and PI Objectives at the Program level to Stories and PI Objectives at the Team level is shown, along with actual and planned business value for each.

By default, this report considers only *new* Program PI Objectives, assuming that those are the ones related to the current Program Increment. The scope is all Program Increments across selected Program(s). Use ▼ **Filters** to set the desired Program Increment using the **Feature Planned For** attribute. If you want to expand the scope to include PI Objectives in other states, use the **Status (Program PI Objective)** attribute.

Report: Program Roadmap

This report shows Program Epics on the timeline with Features and Stories by iteration. We provide both graphical (default) and list views.

By default, the scope of this report is the Agile Release Timeline for all selected Program(s).

Report: Ready for System Demo

This report shows completed Feature with their related Program PI Objectives that are ready for a System demonstration. We provide both list (default) and graphical views.

By default, the scope of this report is the Agile Release Train for all selected Program(s). To scope the report to a specific Program Increment, use ▼ **Filters** to set the desired Program Increment using the **Feature Planned For** attribute.