



SAFE[®] REPORTING GUIDELINES for CLM 6.0.3

Deploying the SAFE reports in your CLM JRS 6.0.3
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: Thursday, March 09, 2017

Change History:

2017-03-09	Fixed bug in Program Velocity and PI Performance Advanced reports
2017-02-07	Completed "Phase 1" Advanced SAFe report updates
2017-02-03	Added "Phase 1" Advanced SAFe reports based on Advanced SQL
2017-01-31	First revision

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) 6.0.3 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.

SAFe Archive	Notes	Status
SAFe 4.0 [3-Level] (6.0.3)	Supports 3-Level SAFe 4.0. These are essentially the SAFe 3.0 reports updated for SAFe 4.0	Done
SAFe 4.0 [4-Level] (6.0.3)	Supports 4-Level SAFe 4.0. These are versions of the SAFe 4.0 3-Level reports augmented to support 4-Level SAFe.	Done
SAFe 4.0 Advanced (6.0.3)	Advanced reports written using Advanced (Phase 1) – See Table 2: SAFe Reports	In Progress

Table 1: SAFe Report Archive Descriptions

A complete set of available SAFe reports is described in Table 2: SAFe Reports. The applicable archives are noted so that you can determine which archives you want to import.

Report	Description	Archive(s)
Active "Hard" Dependencies	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.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Active "Soft" Dependencies	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.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3

All Committed Program Work (by count) for Active Strategic Themes [3-Level]	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.	SAFe 4.0 [3-level] 6.0.3
All Committed Program Work (by count) for Active Strategic Themes [4-Level]	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.	SAFe 4.0 [4-Level] 6.0.3
All Committed Team Work (by count) for Active Strategic Themes [3-Level]	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.	SAFe 4.0 [3-level] 6.0.3
All Committed Team Work (by count) for Active Strategic Themes [4-Level]	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.	SAFe 4.0 [4-Level] 6.0.3
Architectural Runway (Capabilities by Value Stream) - Planned	Shows the roadmap of planned (committed) Enabler Capabilities grouped by Value Stream. The table view provides the detailed breakdown of work from Portfolio Epics > Value Stream Epics > Capabilities.	SAFe 4.0 [4-Level] 6.0.3
Architectural Runway (Capabilities by Value Stream) - Proposed	Shows the roadmap of Enabler Capabilities by Proposed Iteration, grouped by Value Stream. 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 part of the traversal tree required, so this report also shows work in Analysis at the Value Stream level.	SAFe 4.0 [4-Level] 6.0.3
Architectural Runway (Features by Program) [3-Level] - Planned	Shows the roadmap of Enabler Features by planned iteration, grouped by Program. 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.	SAFe 4.0 [3-level] 6.0.3
Architectural Runway (Features by Program) [4-Level] - Planned	Shows the roadmap of Enabler Features by planned iteration, grouped by Program. 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 Program level.	SAFe 4.0 [4-Level] 6.0.3
Architectural Runway (Features by Program) [3-Level] - Proposed	Shows the roadmap of Enabler Features by proposed iteration, grouped by Program. The table view provides the detailed breakdown of work from Portfolio Epic > Program Epic > Feature.	SAFe 4.0 [3-level] 6.0.3
Architectural Runway (Features by Program) [4-Level] - Proposed	Shows the roadmap of Enabler Features by proposed iteration, grouped by Program. The table view provides the detailed breakdown of work from Portfolio Epic > Value Stream Epic > Capability > Feature.	SAFe 4.0 [4-Level] 6.0.3
Capabilities: Defined Effort (Story Points)	Displays the defined effort as a sum of Story Points for Capabilities by rolling up the Story Points from Stories: Story > Feature > Capability. The 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.	SAFe 4.0 [4-Level] 6.0.3
Capability – Feature PI Mismatch	This report shows any mismatches between Capability Planned For targets and linked Program Work Item Planned For targets.	SAFe 4.0 [4-Level] 6.0.3
Capability Progress Measure	The Capability Progress Measure provides an at-a-glance view of the status of Capabilities in a Portfolio. The 4-Level report shows the story point estimates and actuals through the traversal from Capability > Feature > Story.	SAFe 4.0 Advanced (6.0.3)

Capability Progress Report	Shows the set of Features that are new, in progress, and complete for Capabilities planned for the current Program Increment. This report gives an indication at a point in time as to the progress of Capabilities and alerts to any plan issues.	SAFe 4.0 [4-Level] 6.0.3
Estimated vs Actual Story Points	Shows the comparison between estimated story points specified during planning and the actual story points completed specified work item type(s).	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Feature Progress Measure	The Feature Progress Measure provides an at-a-glance view of the status of Features in a Program. The report shows the story point estimates and actuals through the traversal from Feature > Story.	SAFe 4.0 Advanced (6.0.3)
Feature Progress Report	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. This report gives an indication at a point in time as to the progress of Features and alerts to any plan issues.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Feature: Defined Effort (Story Points) [3-Level]	Displays the defined effort as a sum of Story Points for Features by rolling up the story points defined on child Stories: Story > Feature > Program Epic > Portfolio Epic. The 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.	SAFe 4.0 [3-level] 6.0.3
Feature: Defined Effort (Story Points) [4-Level]	Displays the defined effort as a sum of Story Points for Features by rolling up the Story Points from Stories: Story > Feature. The 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.	SAFe 4.0 [4-Level] 6.0.3
PI Performance Report [Value Stream/Program/Team]	<p>This report shows the average achieved value over time for the specified Value Stream, Program or Team scope, grouped by iteration. Best practice suggests that a range between 80% - 100% indicates release stability and is a measure of predictability over time. Teams that are wildly above or below that threshold are considered unpredictable.</p> <p><i>Use this report or the Advanced report that provides the thresholds that can be tailored for your organization. This report allows you to drill down into the details of the average achieved value to view specific PI Objectives that contributed to the overall average.</i></p>	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
PI Performance Report [Value Stream/Program/Team] – With Threshold	<p>This report shows the average achieved value over time for the specified Value Stream, Program or Team scope, grouped by iteration. Best practice suggests that a range between 80% - 100% indicates release stability and is a measure of predictability over time. Teams that are wildly above or below that threshold are considered unpredictable.</p> <p><i>This report enables you to change the thresholds for your organizational standards.</i></p>	SAFe 4.0 Advanced (6.0.3)
Planned Business Value [Value Stream/Program/Team]	Shows the planned business value in progress across the Portfolio. Limit the results to a specific Value Stream, Program, or Team by setting the Program, Owning Team and PI Objective Type.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Planned Program Features without associated Capability	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.	SAFe 4.0 [4-Level] 6.0.3
Portfolio Epic Progress Measure [3-Level]	The Portfolio Epic Progress Measure provides an at-a-glance view of the status of Portfolio Epics in a Portfolio. The 3-Level report shows the story point estimates and actuals through the traversal from Portfolio Epic > Program Epic > Feature > Story.	SAFe 4.0 Advanced (6.0.3)
Portfolio Epic Progress Measure [4-Level]	The Portfolio Epic Progress Measure provides an at-a-glance view of the status of Portfolio Epics in a Portfolio. The 4-Level report shows the	SAFe 4.0 Advanced (6.0.3)

	story point estimates and actuals through the traversal from Portfolio Epic > Value Stream Epic > Capability > Feature > Story.	
Portfolio Roadmap (by Program PI) - Planned	Shows the # of Program Epics (and Features) for each Portfolio Epic planned on the roadmap, grouped by Program PI. The table shows details including target planned Program Epic PIs and related Features (if they exist).	SAFe 4.0 [3-level] 6.0.3
Portfolio Roadmap (by Program PI) - Proposed	Shows the # of Program Epics (and Features) for each Portfolio Epic proposed on the roadmap, grouped by proposed Program PI. The table shows details including target proposed and committed Program Epic PIs and related Features (if they exist).	SAFe 4.0 [3-level] 6.0.3
Portfolio Roadmap (by Program) - Planned	Shows the # of Program Epics (and Features) for each Portfolio Epic planned on the roadmap, grouped by Program. The table shows details including target planned Program Epic PIs and related Features (if they exist).	SAFe 4.0 [3-level] 6.0.3
Portfolio Roadmap (by Program) - Proposed	Shows the # of Program Epics (and Features) for each Portfolio Epic proposed on the roadmap, grouped by Program. The table shows details including target proposed and committed Program Epic PIs and related Features (if they exist).	SAFe 4.0 [3-level] 6.0.3
Portfolio Roadmap (by Value Stream PI) – Planned	Shows the # of Value Stream Epics for each Portfolio Epic on the roadmap, grouped by Value Stream PI. The table shows details including target Value Stream PI and hyperlinked work items.	SAFe 4.0 [4-Level] 6.0.3
Portfolio Roadmap (by Value Stream PI) - Proposed	Shows the # of Value Stream Epics for each Portfolio Epic proposed on the roadmap, grouped by Value Stream. The table shows details including target proposed and committed Value Stream PIs and related Capabilities (if they exist).	SAFe 4.0 [4-Level] 6.0.3
Portfolio Roadmap (by Value Stream) – Planned	Shows the # of Value Stream Epics for each Portfolio Epic on the roadmap, grouped by Value Stream. The table shows details including target Value Stream PI and hyperlinked work items.	SAFe 4.0 [4-Level] 6.0.3
Portfolio Roadmap (by Value Stream) - Proposed	Shows the # of Value Stream Epics for each Portfolio Epic proposed on the roadmap, grouped by Value Stream. The table shows details including target proposed and committed Value Stream PIs and related Capabilities (if they exist).	SAFe 4.0 [4-Level] 6.0.3
Portfolio Status [3-Level]	Shows the # of resolved Features for each Portfolio Epic by PI across the Portfolio.	SAFe 4.0 [3-level] 6.0.3
Portfolio Status [4-Level]	Shows the # of resolved Features for each Value Stream by PI across the Portfolio.	SAFe 4.0 [4-Level] 6.0.3
Program Budgeted Investment [3-Level]	Shows the budgeted investment for each of the Programs within a Portfolio that are realizing business strategy. The table shows details including the precise budgeted capacity and investment for the Program.	SAFe 4.0 [3-level] 6.0.3
Program Budgeted Investment [4-Level]	Shows the budgeted investment for each of the Programs within a Value Stream compared to the Program's Value Stream budgeted investment. The table shows details including the precise budgeted capacity and investment for the Value Streams as well as the break down by Program	SAFe 4.0 [4-Level] 6.0.3
Program Epics: Defined Effort (Story Points)	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. 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. Use the Program PI to reflect planned Program Epics across multiple Programs or limit to a single Program.	SAFe 4.0 [3-level] 6.0.3
Program Epic Progress Measure	The Program Epic Progress Measure provides an at-a-glance view of the status of Program Epics in a Portfolio. The 3-Level report shows the story point estimates and actuals through the traversal from Portfolio Epic > Program Epic > Feature > Story.	SAFe 4.0 Advanced (6.0.3)

Program Roadmap (by Team, by PI)	Bottoms-up view of Work with PI objectives, aligned to Features for the specific Team. If no Team is specified, the scope of results is the Program level. This report provides both graphical and list views.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Program Velocity	This report shows the velocity of the Program as a measure of Story Points for Features by Program PI. Total Story Points, as well as Completed and Open Story Points are displayed graphically. The details show the Features by name with a breakdown of story points total, open and completed.	SAFe 4.0 Advanced (6.0.3)
Ready for System Demo [Value Stream/Program/Team]	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. By default, the report provides results at the Portfolio level across Value Streams, Programs, and Teams for all iterations.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Scope Added	This reports shows the set of work items that have been added to a new iteration within the time frame specified by the new iteration start and end dates. Filter the results by specifying different start and end dates or a particular work item type.	SAFe 4.0 Advanced (6.0.3)
Scope Removed	This reports shows the set of work items that have been removed from an iteration within the time frame specified by the iteration start and end dates. Filter the results by specifying different start and end dates or a particular work item type.	SAFe 4.0 Advanced (6.0.3)
Story Progress Report	Shows the count of Stories achieved, in progress and remaining by Team for the Program and Iteration scope specified. 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.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Sunset Graph [Program]	The Sunset Graph is used to measure and forecast progress in Agile projects. It reports on Features with child Stories that have a Business Value provided through the associated PI Objective to indicate whether or not the related Stories are Mandatory, Planned or Optional: * Feature PI Objective Planned Business Value (7-10) --> Mandatory * Feature PI Objective Planned Business Value (4-6) --> Planned * Feature PI Objective Planned Business Value (1-3) --> Optional	SAFe 4.0 Advanced (6.0.3)
Sunset Graph [Team]	The Sunset Graph is used to measure and forecast progress in Agile projects. It reports on Stories that have a Business Value provided through the associated PI Objective to indicate whether or not the related Stories are Mandatory, Planned or Optional: * Story PI Objective Planned Business Value (7-10) --> Mandatory * Story PI Objective Planned Business Value (4-6) --> Planned * Story PI Objective Planned Business Value (1-3) --> Optional	SAFe 4.0 Advanced (6.0.3)
Unresolved Defects by Program	Shows defects that are not resolved and not on the backlog, grouped by Program, with their associated test plan, if any.	SAFe 4.0 [3-level] 6.0.3 SAFe 4.0 [4-Level] 6.0.3
Value Stream Epic Progress Measure	The Value Stream Epic Progress Measure provides an at-a-glance view of the status of Value Stream Epics in a Portfolio. The 4-Level report shows the story point estimates and actuals through the traversal from Value Stream Epic > Capability > Feature > Story.	SAFe 4.0 Advanced (6.0.3)
Value Stream Epics: Defined Effort (Story Points)	Displays the defined effort as a sum of Story Points for Value Stream Epics by rolling up the Story Points from Stories: Story > Feature > Capability > Value Stream Epic. The 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 Value Stream Epics that have been planned are displayed.	SAFe 4.0 [4-Level] 6.0.3
Value Stream Investment & Opportunity	Shows the Total Market Opportunity as well as the budgeted and allocated investment (when specified) for each Value Stream in the Portfolio. Details include the budgeted and allocated capacity based on the investment.	SAFe 4.0 [4-Level] 6.0.3
Value Stream Roadmap (by Program) – Planned	Shows the # of Features (or the # of Capabilities if there are no Features) for each Value Stream Epic planned on the roadmap by	SAFe 4.0 [4-Level] 6.0.3

	planned iteration, grouped by Program. The details include the results grouped by business strategy and the breakdown: Portfolio Epics > Value Stream Epics> Capabilities > Features.	
Value Stream Roadmap (by Program) - Proposed	Shows the # of Features (or the # of Capabilities if there are no Features) for each Value Stream Epic proposed on the roadmap by proposed iteration, grouped by Program. The details include the results grouped by business strategy and the breakdown: Portfolio Epics > Value Stream Epics> Capabilities > Features.	SAFe 4.0 [4-Level] 6.0.3

Table 2: SAFe Reports

Unless otherwise specified, you are free to use a report archive for the specified **or later** version of CLM (JRS).

Importing the SAFe 4.0 Reports

In this section, instructions for importing the applicable SAFe archive files into your CLM environment are described.



Some of the reports in the archives listed above will import successfully with or without any SAFe project areas created that contain real or sample data. In particular, you can import all of the **SAFe 4.0 Advanced (6.0.3)** reports without any SAFe metadata. Most of the 3- and 4-Level reports will **not** import successfully until you have SAFe 4.0 projects with real or sample data collected in the Data Warehouse. Review the [Troubleshooting](#) section for further information.

Preparing for Import

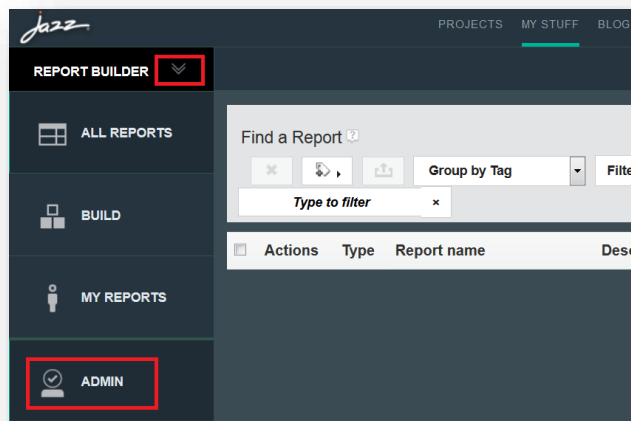
In order to import the SAFe 4.0 reports, you must have a correctly configured SAFe 4.0 environment. This could be from using the SAFe templates or by configuring an existing environment to support SAFe 4.0 following instructions provided on the [Configuring the SAFe® Methodology in CLM](#) page.

To configure a new CLM 6.0.3 environment, follow these instructions:

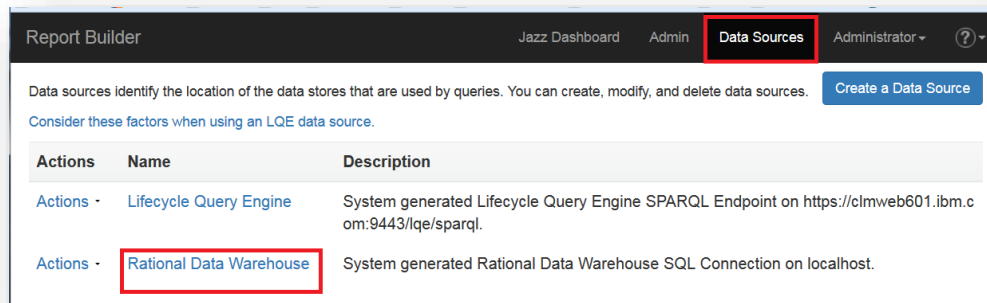
- Create Program (and Portfolio, if applicable) project areas using the SAFe templates:
 - RTC Program Project Area**
 - On the RTC Application Administration page, navigate to Templates and then **Deploy Predefined Templates**
 - Create a new SAFe Program project area based on the SAFe Program process template
 - CLM (or RTC only) Portfolio Project Area(s)**
 - If you are using at least two of the CLM tools (RTC, RDNG, RQM), create a SAFe Portfolio **CLM Lifecycle Project Area**:
 - On the Jazz Team Server Administration page, select the **Create Lifecycle Project** option.
 - Create a CLM LPA using the SAFe templates (default)
 - If you are only using RTC, create a SAFe Portfolio **RTC** project area based on the SAFe Portfolio process template. *Note that, in this case, any reports requiring RQM or RDNG metadata will not import successfully.* Review the [Troubleshooting](#) section for further information.
- If you are using RDNG, create sample **Value Stream** and **Program** artifacts, taking care to specify all of the attributes:

Name	Artifact Type	Allocated Capacity	Allocated Investment*	Budgeted Investment	Budgeted Capacity	Total Market Opportunity
 Sample Program	[SAFE] Program	100.000000	1,000,000.000000	500,000.000000	50.000000	
 Sample Value Stream	[SAFE] Value Stream	5,000,000.000000	1,000,000.000000	100.000000	500.000000	12,000,000

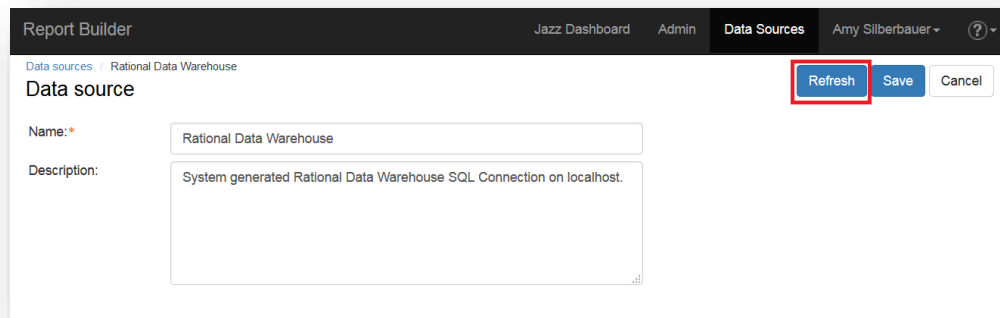
3. Run data collection via the Data Collection application:
 - a. Launch DCC in your browser: <https://<host>:<port>/dcc/web>
 - b. Click **Run all data warehouse collection jobs**
 - c. Ensure all jobs complete successfully
4. Refresh your JRS data warehouse Data Source:
 - a. Launch JRS in your browser: <https://<host>:<port>/rs>
 - b. Click the **Report Builder** menu drop-down, then **Admin**:



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



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



5. Click **Admin** to return to the Report Builder Administration page and import one or more of the SAFe reports archive files:
 - a. In **Import ready-to-use reports**, select **Optional: Import additional reports such as those provided by IBM, business partners, or others**.
 - b. Browse to the location where you have downloaded the *applicable SAFe report archives* and select any one of them. Click OK.
 - c. Repeat this process to import the remaining archive files.

If you have followed all of the steps above and have both a CLM SAFe Portfolio Lifecycle Project Area and an RTC Program Project Area with the Value Stream and Program sample artifacts created in RDNG, all of the reports should have imported successfully.

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 and you will see a list of the successfully imported reports as well as those that could not be imported due to errors.

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 have not created any project areas (any level of CLM), run Data Collection or refreshed the Data Source.** As described above, metadata must be in the data warehouse and, regardless of how little or how much of the SAFe capabilities you are utilizing, you must run data collection and refresh the Data Source metadata schema in order for the reports to be imported.

Errors from SAFe 4.0 [3-Level] (6.0.3) import:

5 reports imported. 16 reports skipped. 9:28:23 AM

The following reports were imported successfully:

- Portfolio Status [3-Level]
- Unresolved Defects by Program
- Portfolio Roadmap (by Program PI) - Planned
- Portfolio Roadmap (by Program) - Planned
- Active "Hard" Dependencies

Errors from SAFe 4.0 [4-Level] (6.0.3) import:

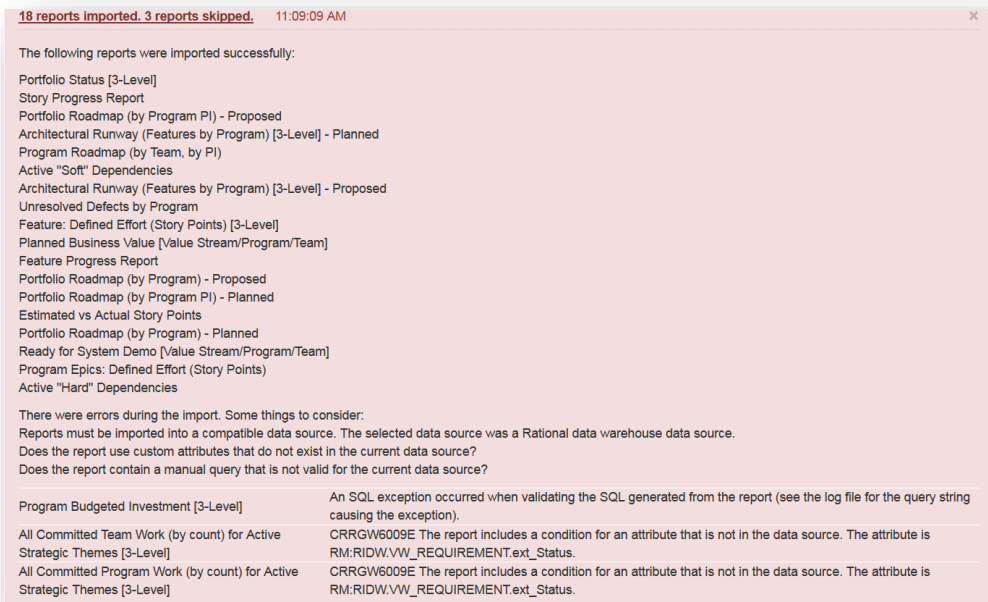
9 reports imported. 21 reports skipped. 9:30:19 AM

The following reports were imported successfully:

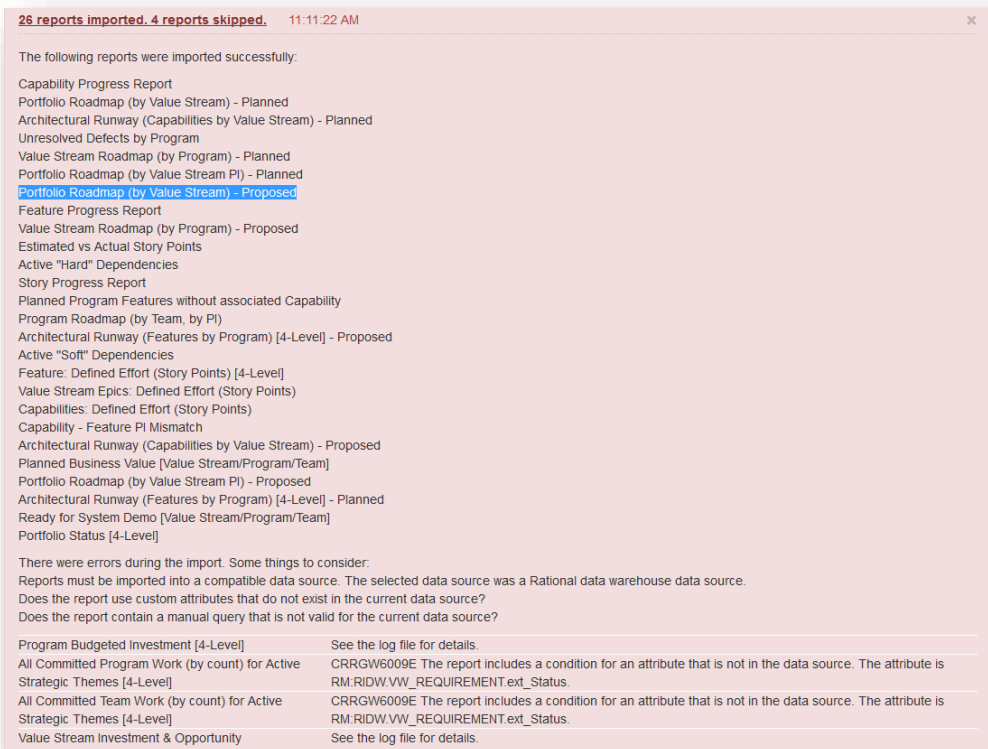
- Capability Progress Report
- Portfolio Roadmap (by Value Stream) - Planned
- Unresolved Defects by Program
- Value Stream Roadmap (by Program) - Planned
- Portfolio Roadmap (by Value Stream PI) - Planned
- Active "Hard" Dependencies
- Planned Program Features without associated Capability
- Capability - Feature PI Mismatch
- Portfolio Status [4-Level]

2. **You are using RTC only, not RDNG or RQM (or you have not created the Portfolio CLM Lifecycle Project Area).** In this case, the reports pulling from RDNG will not import successfully.

Errors from SAFe 4.0 [3-Level] (6.0.3) import:

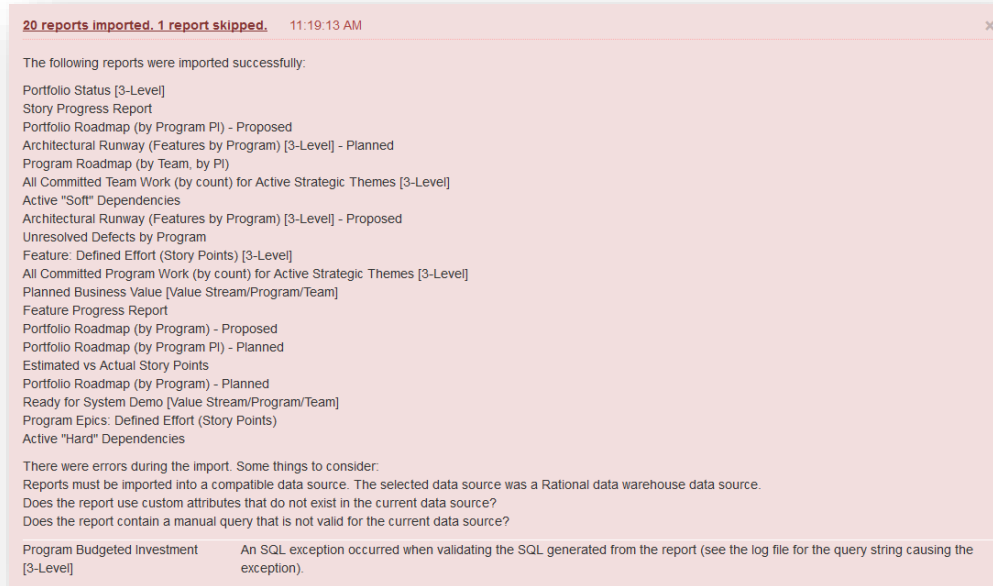


Errors from SAFe 4.0 [4-Level] (6.0.3) import:



3. **You have created a SAFe Portfolio Lifecycle Project Area, but have not created the required sample data.** The reports that require the Value Stream and/or Program RDNG artifacts will not import successfully, but all other reports are fine.

Errors from SAFe 4.0 [3-Level] (6.0.3) import:



Errors from SAFe 4.0 [4-Level] (6.0.3) import:



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 3: Metrics prescribed by SAFe below. Note that the reports are delivered in one of three archive files, as shown in the table.

The Advanced reports are a work-in-progress with new reports being delivered as we develop them. The reports in green cells below are those which have been delivered in the latest posted archives.

SAFe Level	Metric	Link	Reporting Archive File(s)
Portfolio	Epic Burnup Chart	http://www.scaledagileframework.com/metrics/#PF3	SAFe 4.0 Advanced (6.0.3)
	Epic Progress Measure	http://www.scaledagileframework.com/metrics/#PF4	SAFe 4.0 Advanced (6.0.3)
Value Stream	Value Stream Predictability Measure (PI Performance report)	http://www.scaledagileframework.com/metrics/#V2	SAFe 4.0 Advanced (6.0.3)
	Value Stream Performance Metrics	http://www.scaledagileframework.com/metrics/#V3	SAFe 4.0 [3-Level] (6.0.3) SAFe 4.0 [4-Level] (6.0.3)

Program	Feature Progress	http://www.scaledagileframework.com/metrics/#P0	SAFe 4.0 [3-Level] (6.0.3) SAFe 4.0 [4-Level] (6.0.3)
	Program Predictability Measure (PI Performance report)	http://www.scaledagileframework.com/metrics/#P2	SAFe 4.0 Advanced (6.0.3)
	Performance Metrics	http://www.scaledagileframework.com/metrics/#P3	SAFe 4.0 [3-Level] (6.0.3) SAFe 4.0 [4-Level] (6.0.3)
	PI Burn-down	http://www.scaledagileframework.com/metrics/#P4	SAFe 4.0 Advanced (6.0.3)
	Cumulative Flow Diagram	http://www.scaledagileframework.com/metrics/#P5	SAFe 4.0 Advanced (6.0.3)
Team	Iteration Metrics	http://www.scaledagileframework.com/metrics/#T1	SAFe 4.0 [3-Level] (6.0.3) SAFe 4.0 [4-Level] (6.0.3)
	Team PI Performance Report	http://www.scaledagileframework.com/metrics/#T3	SAFe 4.0 Advanced (6.0.3)

Table 3: 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.

*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

The tables below describe the set of SAFe 4.0 4-Level reports suitable for the associated SAFe levels and roles built using the 6.0.3 version of the JRS Report Builder. Unless noted, the reports are created with the Report Builder UI and can be copied for customization.

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.

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
- **Dashboard Tab Column:** Guidance on the most suitable column on a specific dashboard tab, dictated by headings suggested in post-installation configuration guidance
- **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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Portfolio Overview	Column 2 Heading (optional): <i>As a Portfolio Manager or Director, I need to understand how work is aligned with business strategy and how my budget is allocated across Value Streams</i>	How is allocated work aligned with business strategy for the current PI?	All Committed Program Work (by count) for Active Strategic Themes [4-Level] <i>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.</i>	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
		How is Portfolio budget disbursed across Value Streams?	Value Stream Investment & Opportunity	Limit Scope: RDNG SAFe Portfolio project area
	Column 3 Heading (optional): <i>As a Portfolio Manager or Director, I need to know what Portfolio Epics have been delivered and what is proposed on the roadmap for delivery</i>	What is our Portfolio delivery roadmap?	Portfolio Roadmap (by Value Stream PI) - Proposed <i>Note: If you do not use the Proposed attribute in work items, use the Portfolio Roadmap (by Value Stream PI) – Planned version of this report which uses the <i>Planned For</i> attribute.</i>	Limit Scope: RTC Portfolio project area, RDNG SAFe Portfolio project area
		Which Value Streams contribute to Portfolio delivery?	Portfolio Roadmap (by Value Stream) - Proposed <i>Note: If you do not use the Proposed attribute in work items, use the Portfolio Roadmap (by Value Stream) – Planned version</i>	Limit Scope: RTC Portfolio project area, RDNG SAFe Portfolio project area

			of this report which uses the <i>Planned For</i> attribute.	
		Value Stream Architectural Runway	Architectural Runway (Capabilities by Value Stream) - Proposed <i>By default, the Portfolio Epic and Value Stream Epic could be <u>Business</u> or <u>Enabler</u> type and all lower-level work items are assumed to be <u>Enabler</u> type. This can be changed via the filters for each Work Item Work Type attribute.</i> Note: If you do not use the Proposed attribute in work items, use the Architectural Runway (Capabilities by Value Stream) – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: All SAFe RTC project areas
Value Stream Overview	Column 2 Heading (optional): <i>As a Solution Manager, I need to understand how work is aligned, what work has been delivered and what is on the roadmap for delivery</i>	What are the Value Streams' Programs working on?	Value Stream Roadmap (by Program) - Proposed Note: If you do not use the Proposed attribute in work items, use the Value Stream Roadmap (by Program) – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: All RTC project areas, RDNG SAFe Portfolio project area (optional) Feature Type: Feature, by default. Specify additional types to support hybrid Programs
	Column 3 Heading (optional): <i>As a Value Stream Engineer, I need to understand how my budget is allocated across the Programs in my Value Stream so that I can help the Solution team craft the roadmap</i>	How are Value Stream budgets disbursed across Programs?	Program Budgeted Investment [4-Level]	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] - Proposed Note: If you do not use the Proposed attribute in work items, use the Architectural Runway (Features by Program) [4-Level] – Planned version of this	Limit Scope: All SAFe RTC project areas

			report which uses the <i>Planned For</i> attribute.	
Portfolio Execution (Current PI)	Value Delivery	What is ready to be demonstrated?	Ready for System Demo [Value Stream/Program/Team]	Limit Scope: RTC Portfolio project area PI Objective Iteration: Current PI
		What is the planned value to be delivered for this PI?	Planned Business Value [Value Stream/Program/Team]	Limit Scope: RTC Portfolio project area Objective Type: Value Stream Objective Iteration: Current PI
	Status & Progress	How are we progressing on delivery of Capabilities?	Capability Progress Report	Limit Scope: All RTC project areas Capability PI: Current PI (optional) Feature Type: Feature, by default. Specify additional types to support hybrid Programs
	Planning	What is the defined effort for this PI?	Capabilities: Defined Effort (Story Points)	Limit Scope: All RTC project areas Capability PI: Current PI
Risks and Impediments	Risk & Process Issues	Are there planning issues between the Portfolio and the Programs?	Capability – Feature PI Mismatch	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	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
	Dependencies	What active work do the Value Streams have marked as "blocked"?	Active "Soft" Dependencies	Limit Scope: RTC Portfolio project area Blocked Team: Portfolio and Value Streams

		What work is blocking work of the Value Streams?	Active “Hard” Dependencies	Limit Scope: All RTC project areas Blocked Team: Portfolio and Value Streams Blocking Team: All RTC project areas
	Quality	Which Defects are affecting Portfolio quality?	Unresolved Defects by Program	Limit Scope: All RTC project areas, RQM SAFe Portfolio project area Defect Iteration: All Backlog iterations on all timelines in scope (Defect is <i>not</i> on Backlog) (optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default
Trends	Value Delivery	How is JKE Financial Services doing on value delivery?	PI Performance Report [Value Stream/Program/Team]	Limit the scope: RTC Portfolio project area PI Objective Type: Value Stream Filed Against: JKE Financial Services
		How is JKE Meter Reader doing on value delivery?		Limit the scope: RTC Portfolio project area PI Objective Type: Value Stream Filed Against: JKE Meter Reader
	Effort Estimation	How are we doing on Capability progress overall?	[SAFe 4.0 Advanced (6.0.3)] Capability Progress Measure	Portfolio: All RTC project areas
		How well are we estimating effort for the Portfolio work?	Estimated vs Actual Story Points.	Limit Scope: RTC Portfolio project area Work Item Type: Value Stream Epic Work Item Status: Resolved (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	Limit Scope: RTC Portfolio project area Work Item Type: Capability Work Item Status: Resolved (optional) Work Item Iteration: Select one or more PIs

	Velocity	Are we improving our velocity?	[SAFe 4.0 Advanced (6.0.3)] Program Velocity	Program: All RTC Program project areas in scope
		How many Features have the Value Streams delivered?	Portfolio Status [4-Level]	Limit Scope: All RTC project areas (optional) Capability 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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Program Overview	Column 2	How is allocated work aligned with business strategy for the current PI?	All Committed Team Work (by count) for Active Strategic Themes [4-Level]	Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope, 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
	Column 3	What are the Program's Teams working on?	Program Roadmap (by Team, by PI)	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) – Proposed [4-Level] <i>Note that, by default, the Portfolio Epic and Value Stream Epic could be <u>Business</u> or <u>Enabler</u> type and all lower-level work items are assumed to be <u>Enabler</u> type. This can be changed via the filters for each Work Item Work Type attribute.</i> Note: If you do not use the Proposed attribute in work items, use the Architectural Runway (Features by Program) [4-Level] – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope
Current Program Increment (PI) Progress	Value Delivery	What is ready to be demonstrated?	Ready for System Demo [Value Stream/Program/Team]	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]	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
	Status & Progress	How are the Teams progressing against the plan?	Story Progress Report	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

		How is the Program progressing against the plan?	Feature Progress Report	<p>Limit Scope: RTC Program and Team project areas in scope</p> <p>Feature PI: Current Program PI</p> <p>(optional) Story Type: Story, by default. For Hybrid Programs, specify additional types</p> <p>(optional) Feature Type: Feature, by default. For Hybrid Programs, specify additional types</p>
		What is the defined effort for Features in this PI?	Features: Defined Effort (Story Points) [4-Level]	<p>Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope</p> <p>Feature PI: Current Program PI</p>
Risks and Impediments	Risks & Process Issues	Are there planning issues between the Portfolio and this Program?	Capability – Feature PI Mismatch	<p>Limit Scope: RTC Portfolio project area, RTC Program project area in scope</p> <p>Capability PI: Current PI</p> <p>Feature PI: Current PI (not any of)</p> <p>(optional) Feature Type: Feature, by default. Specify additional types to support hybrid Programs</p>
		Have we committed Features without associated Capabilities?	Planned Program Features without associated Capability	<p>Limit Scope: RTC Portfolio project area, RTC Program project area in scope</p> <p>Feature PI: Current PI</p> <p>(optional) Feature Type: Feature, by default. Specify additional types to support hybrid Programs</p>
	Dependencies	What active work does my Program have marked as "blocked"?	Active “Soft” Dependencies	<p>Limit Scope: RTC Program (and Team) project areas in scope</p> <p>Blocked Team: Program and Teams in scope</p>
		What work is blocking work of my Program?	Active “Hard” Dependencies	<p>Limit Scope: All RTC project areas</p> <p>Blocked Team: Program and Teams in scope</p> <p>Blocking Team: All other Programs, Teams (and Portfolio and Value Streams, if desired) in scope</p>

		What work is my Program blocking?	Active “Hard” Dependencies	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
	Quality	Which Defects are affecting Program quality?	Unresolved Defects by Program	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 <i>not</i> on Backlog) (optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default
Trends	Value Delivery Over Time	How is my Program doing on value delivery?	[SAFe 4.0 Advanced (6.0.3)] PI Performance Report [Value Stream/Program/Team] – With Threshold	Project: RTC Program and Team project areas in scope Team: Program in scope
	Effort Estimation	How well are we estimating effort for the Program work?	Estimated vs Actual Story Points	Limit Scope: RTC Program project area in scope Work Item Type: Feature Work Item Status: Resolved (optional) Work Item Iteration: Select one or more PIs.
		How are we doing on Feature progress overall?	[SAFe 4.0 Advanced (6.0.3)] Feature Progress Measure	Program: RTC Program and Team project areas in scope
	Velocity	Are we improving our velocity?	[SAFe 4.0 Advanced (6.0.3)] Program Velocity	Program: RTC Program and Team project areas in scope
		How many Features has my Program delivered?	Portfolio Status [4-Level]	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

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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Scrum Master	Needs Attention!	Which stories require attention?	[JRS ready-to-use report – OOTB] Incomplete Stories (table and graph)	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	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 <i>not</i> on Backlog) Team: Team in scope (optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default
	Current Status	How are we progressing against the plan?	Story Progress Report	Limit Scope: RTC Program and Team project areas in scope Team Iteration: All Team iterations within the current Program PI Team: Team 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 current status?	[JRS ready-to-use report – OOTB] Burndown by Story Points	Project: RTC Program and Team project areas in scope
			[JRS ready-to-use report – OOTB] Burnup by Story Points	Iteration: Team iteration Team: Team in scope
	Dependencies	What has my Team marked as "blocked"?	Active "Soft" Dependencies	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	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	Limit Scope: All RTC project areas Blocked Team: All other Programs (and Portfolio if desired) in scope Blocking Team: Team in scope
Product Owner	Current Status	What are we ready to demonstrate?	Ready for System Demo [Value Stream/Program/Team]	Limit Scope: RTC Program and Team project areas in scope Owning Team: Team in scope PI Objective Type: Team PI Objective Iteration: All Sprints in current PI
		What is the Feature progress?	Feature Progress Report	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
	Value Delivery	Are we improving our value delivery?	[SAFe 4.0 Advanced (6.0.3)] PI Performance Report [Value Stream/Program/Team] – With Threshold	Project: RTC Program and Team project areas in scope Team: Team in scope
	History	Are we improving our velocity?	[JRS ready-to-use report – OOTB] Team Velocity	Project: RTC Program and Team project areas in scope Timeline: Project timeline(s) Team: Team in scope
		How are we doing on Feature progress overall?	[SAFe 4.0 Advanced (6.0.3)] Feature Progress Measure	Program: RTC Program and Team project areas in scope

SAFe 4.0 [3-Level] Reports

The tables below describe the set of SAFe 4.0 3-Level reports suitable for the associated SAFe levels and roles built using the 6.0.3 version of the JRS Report Builder. Unless noted, the reports are created with the Report Builder UI and can be copied for customization.

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
- **Dashboard Tab Column:** Guidance on the most suitable column on a specific dashboard tab, dictated by headings suggested in post-installation configuration guidance
- **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 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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Portfolio Overview	Column 2 Heading (optional): <i>As a Portfolio Manager or Director, I need to understand how work is aligned with business strategy and how my budget is allocated</i>	How is allocated work aligned with business strategy for the current PI?	All Committed Program Work (by count) for Active Strategic Themes [3-Level]	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
		How is Portfolio budget disbursed across Programs?	Program Budgeted Investment [3-Level]	Limit Scope: RDNG SAFe Portfolio project area (optional) Value Stream: All Value Streams, by default. To view information for a specific Value

	<i>across Value Streams</i>			Stream, specify the Value Stream name
	Column 3 Heading (optional): <i>As a Portfolio Manager or Director, I need to know what Portfolio Epics have been delivered and what is proposed on the roadmap for delivery</i>	What is our Portfolio delivery roadmap?	Portfolio Roadmap (by Program PI) - Proposed Note: If you do not use the Proposed attribute in work items, use the Portfolio Roadmap (by Program PI) – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: RTC Portfolio project area, RDNG SAFe Portfolio project area
		Which Programs contribute to Portfolio delivery?	Portfolio Roadmap (by Program) - Proposed Note: If you do not use the Proposed attribute in work items, use the Portfolio Roadmap (by Program) – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: RTC Portfolio project area, RDNG SAFe Portfolio project area
		Program Architectural Runway	Architectural Runway (Features by Program) - Proposed Note: If you do not use the Proposed attribute in work items, use the Architectural Runway (Features by Program) – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: All SAFe RTC project areas
Portfolio Execution (Current PI)	Value Delivery	What is ready to be demonstrated?	Ready for System Demo [Value Stream/Program/Team]	Limit Scope: RTC Portfolio project area PI Objective Iteration: Current PI
		What is the planned value to be delivered for this PI?	Planned Business Value [Value Stream/Program/Team]	Limit Scope: RTC Portfolio project area Objective Type: Value Stream Objective Iteration: Current PI
	Status & Progress	How are we progressing on delivery of Features?	Feature Progress Report	Limit Scope: All RTC project areas Capability PI: Current PI (optional) Feature Type: Feature, by default. Specify additional types to support hybrid Programs

	Planning	What is the defined effort for this PI?	Features: Defined Effort (Story Points)	Limit Scope: All RTC project areas Capability PI: Current PI
Risks and Impediments	Dependencies	What active work do the Programs have marked as "blocked"?	Active "Soft" Dependencies	Limit Scope: RTC Portfolio project area Blocked Team: Portfolio and Programs
		What work is blocking work of the Programs?	Active "Hard" Dependencies	Limit Scope: All RTC project areas Blocked Team: All RTC project areas Blocking Team: All RTC project areas
	Quality	Which Defects are affecting Portfolio quality?	Unresolved Defects by Program	Limit Scope: All RTC project areas, RQM SAFe Portfolio project area Defect Iteration: All Backlog iterations on all timelines in scope (Defect is <i>not</i> on Backlog) (optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default
Trends	Value Delivery	How is JKE Financial Services doing on value delivery?	PI Performance Report [Value Stream/Program/Team]	Limit the scope: RTC Portfolio project area PI Objective Type: Value Stream Filed Against: JKE Financial Services
		How is JKE Meter Reader doing on value delivery?		Limit the scope: RTC Portfolio project area PI Objective Type: Value Stream Filed Against: JKE Meter Reader
	Effort Estimation	How well are we estimating effort for the Portfolio work?	Estimated vs Actual Story Points <i>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.</i>	Limit Scope: RTC Portfolio project area Work Item Type: Portfolio Epic Work Item Status: Resolved (optional) Work Item Iteration: Select one or more PIs
		How well are we estimating effort for the Program work?	Estimated vs Actual Story Points <i>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.</i>	Limit Scope: RTC Portfolio project area Work Item Type: Program Epic Work Item Status: Resolved (optional) Work Item Iteration: Select one or more PIs

		How are we doing on Portfolio progress overall?	[SAFe 4.0 Advanced (6.0.3)] Portfolio Epic Progress Measure [3-Level]	Portfolio: All RTC project areas
	Velocity	Are we improving our velocity?	[SAFe 4.0 Advanced (6.0.3)] Program Velocity	Program: All RTC Program and Team project areas in scope
		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 Epic 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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Program Overview	Column 2	How is allocated work aligned with business strategy for the current PI?	All Committed Team Work (by count) for Active Strategic Themes [3-Level]	Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope, 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
	Column 3	What are the Program's Teams working on?	Program Roadmap (by Team, by PI)	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) – Proposed [3-Level] <i>Note that, by default, the Portfolio Epic and Value Stream Epic could be <u>Business</u> or <u>Enabler</u> type and all lower-level work items are assumed to be <u>Enabler</u> type. This can be changed via the filters for each Work Item Work Type attribute.</i> Note: If you do not use the Proposed attribute in work items, use the Architectural Runway (Features by Program) [3-Level] – Planned version of this report which uses the <i>Planned For</i> attribute.	Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope
Current Program Increment (PI) Progress	Value Delivery	What is ready to be demonstrated?	Ready for System Demo [Value Stream/Program/Team]	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]	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
	Status & Progress	How are the Teams progressing against the plan?	Story Progress Report	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

		How is the Program progressing against the plan?	Feature Progress Report	<p>Limit Scope: RTC Program and Team project areas in scope</p> <p>Feature PI: Current Program PI</p> <p>(optional) Story Type: Story, by default. For Hybrid Programs, specify additional types</p> <p>(optional) Feature Type: Feature, by default. For Hybrid Programs, specify additional types</p>
		What is the defined effort for Features in this PI?	Features: Defined Effort (Story Points) [3-Level]	<p>Limit Scope: RTC Portfolio project area, RTC Program and Team project areas in scope</p> <p>Feature PI: Current Program PI</p>
Risks and Impediments	Dependencies	What active work does my Program have marked as "blocked"?	Active "Soft" Dependencies	<p>Limit Scope: RTC Program (and Team) project areas in scope</p> <p>Blocked Team: Program and Teams in scope</p>
		What work is blocking work of my Program?	Active "Hard" Dependencies	<p>Limit Scope: All RTC project areas</p> <p>Blocked Team: Program and Teams in scope</p> <p>Blocking Team: All other Programs, Teams (and Portfolio and Value Streams, if desired) in scope</p>
		What work is my Program blocking?	Active "Hard" Dependencies	<p>Limit Scope: All RTC project areas</p> <p>Blocked Team: All other Programs, Teams (and Portfolio and Value Streams, if desired) in scope</p> <p>Blocking Team: Program and Teams in scope</p>
	Quality	Which Defects are affecting Program quality?	Unresolved Defects by Program	<p>Limit Scope: RQM SAFe Portfolio project area, RTC Program and Team project areas in scope</p> <p>Defect Iteration: Backlog iteration on Program (and Team) timeline (Defect is <i>not</i> on Backlog)</p> <p>(optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default</p>
Trends	Value Delivery Over Time	How is my Program doing on value delivery?	[SAFe 4.0 Advanced (6.0.3)] PI Performance Report [Value Stream/Program/Team] – With Threshold	<p>Project: RTC Program and Team project areas in scope</p> <p>Team: Program in scope</p>

	Effort Estimation	How well are we estimating effort for the Program work?	Estimated vs Actual Story Points <i>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.</i>	Limit Scope: RTC Program project area in scope Work Item Type: Feature Work Item Status: Resolved (optional) Work Item Iteration: Select one or more PIs.
		How are we doing on Feature progress overall?	[SAFe 4.0 Advanced (6.0.3)] Feature Progress Measure	Program: RTC Program and Team project areas in scope
	Velocity	Are we improving our velocity?	[SAFe 4.0 Advanced (6.0.3)] Program Velocity	Program: RTC Program and Team project areas in scope
		How many Features has my Program delivered?	Portfolio Status [3-Level]	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

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	Dashboard Tab Column	Answers the question...	Report Name & Description	Filters
Scrum Master	Needs Attention!	Which stories require attention?	[JRS ready-to-use report – OOTB]	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	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 <i>not</i> on Backlog) Team: Team in scope (optional) Status Group Category (Defect [Type: Work Item]): Unresolved, by default
	Current Status	How are we progressing against the plan?	Story Progress Report	Limit Scope: RTC Program and Team project areas in scope Team Iteration: All Team iterations within the current Program PI

				Team: Team 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 current status?	[JRS ready-to-use report – OOTB] Burndown by Story Points	Project: RTC Program and Team project areas in scope Iteration: Team iteration
			[JRS ready-to-use report – OOTB] Burnup by Story Points	Team: Team in scope
	Dependencies	What has my Team marked as "blocked"?	Active "Soft" Dependencies	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	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	Limit Scope: All RTC project areas Blocked Team: All other Programs (and Portfolio if desired) in scope Blocking Team: Team in scope
	Product Owner	Current Status	What are we ready to demonstrate?	Ready for System Demo [Value Stream/Program/Team] Limit Scope: RTC Program and Team project areas in scope Owning Team: Team in scope PI Objective Type: Team PI Objective Iteration: All Sprints in current PI
			What is the Feature progress?	Feature Progress Report 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

	Value Delivery	Are we improving our value delivery?	[SAFe 4.0 Advanced (6.0.3)] PI Performance Report [Value Stream/Program/Team] – With Threshold	Project: RTC Program and Team project areas in scope Team: Team in scope
	History	Are we improving our velocity?	[JRS ready-to-use report – OOTB] Team Velocity	Project: RTC Program and Team project areas in scope Timeline: Project timeline(s) Team: Team in scope
		How are we doing on Feature progress overall?	[SAFe 4.0 Advanced (6.0.3)] Feature Progress Measure	Program: RTC Program and Team project areas in scope