HP APM for PPM

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HP Application Portfolio Management User's Guide

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- Software version number, which indicates the software version
- Document release date, which changes each time the document is updated
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Why version number 9.10?

HP APM for PPM is an integrated part of the HP BTO Operations version 9 portfolio. Using this version number aligns HP APM with other products that are releasing in the same time frame. Product releases within the HP BTO Operations version 9 portfolio will feature shared technology, common platforms, integrations, solutions, upgrade tools, and professional services offerings.

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To find more information about access levels, go to:

h20230.www2.hp.com/new_access_levels.jsp

To register for an HP Passport ID, go to:

h20229.www2.hp.com/passport-registration.html

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1 Introduction to HP Application Portfolio Management

Introduction to HP Application Portfolio Management

Application transformation is the process of assessing and modernizing your application portfolio. Use HP Application Portfolio Management (HP APM) to take the first step towards this transformation as you use it to assess your current application portfolio and help you to determine which applications need to be modernized.

Use HP APM to:

- Document the size of your application portfolio and the applications that support your business processes.
- Compare and analyze application information such as health, effectiveness, ownership, cost of ownership, business value, and risk.
- Identify improvement opportunities and modernize your application portfolio by making strategic decisions about the future of each application in the portfolio, including whether the applications should be kept, changed, or retired.

HP APM is a module of HP Project and Portfolio Management Center (PPM Center). It adds functionality to the standard PPM Center interface.

There are three types of HP APM users: user, analyst, and administrator.

- **User.** The most basic user of HP APM. Users perform tasks such as creating application entities, managing the applications they own, supplying information for applications when requested by the analyst, and responding to surveys when requested to do so by the analyst and other users (as a proxy). Users can also view consolidated data about applications in the organization's application portfolio.

Alternatively, a user might not be an active user of HP APM. This type of user could be set up for informational purposes only, to fulfill a certain role for an application or other entity, such as the role of Business Owner or ITO Contact.

For more information about the user's role, see *The Role of the User*.

- **Analyst.** The most active user of HP APM. The analyst collects and analyzes data about the organization and its application portfolio. The analyst can import and export entity data, define portlets, and analyze applications using application sets, portlets, reports, graphing, and entity groupings. The analyst can typically perform all the duties of a user. For more information about the HP APM user, see the *HP Application Portfolio Management Analyst's Guide.*

- **Administrator.** The most advanced user of HP APM. The administrator has all the abilities of an analyst and user but is typically involved with supporting the analyst to achieve his goals. The administrator installs, sets up, and maintains HP APM, defines users, customizes fields and validations for entities, and can create customized entities, data sources, workflows, validations, report types, and security groups. For more information about the HP APM administrator, see the *HP Application Portfolio Management Administrator's Guide.*

This guide is intended for HP APM users. It describes the common HP APM–related tasks typically performed by users and provides instructions for performing the tasks—or it refers the reader to the PPM Center documents that provide the necessary information. The appendixes describe the sections and fields in an application entity and the PPM Dashboard pages and portlets that are typically provided for HP APM users.

➤ This guide describes the default interface for HP APM. Your HP APM administrator might have customized the fields and pages to meet your organization's business needs and requirements. Customizations such as these are not documented in this guide.

The Role of the User

As an HP APM user, your responsibilities could include the following tasks:

- Monitoring information about your applications and deliverables that is provided in the portlets on your PPM Dashboards. For more information about the PPM Dashboard and portlets and the information they provide, see Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15.
- Track application entities that you own and workstreams to which you are assigned. For information, see Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15.
- Building an application portfolio. For instructions, see *Guidelines for Building Your Application Portfolio*.
- Creating application entities. For information, see *Creating Application Entities* on page 22.
- Responding to surveys that rate applications you own or use. For instructions, see *Completing Surveys* on page 27.
- Providing information about application entities when you are requested to do so. For instructions, see *Responding to Requests for Application Information* on page 31.
- Performing additional tasks if you are assigned one of the application entity roles described in this section.

As an HP APM user, you can view and edit all sections of entities that you create and entities for which you are the owner. You can view application information in the Header, Business Environment, Technical Environment, and Usage & Scale sections of all application entities. You can also view a list of the applications in your organization’s portfolio and the consolidated data about those applications. If you are assigned additional roles or permissions within HP APM, you are able to perform additional tasks.

The additional roles to which you could be assigned allow you to perform additional functions. Roles such as Business Owner, Technical Owner, and Respondent are assigned in the Contacts section of an application entity. Other roles are assigned in the Summary and Staffing sections of a workstream entity, and, when applicable, in the Summary section of other entities. Most roles allow HP APM users to perform additional functions such as viewing or editing data in sections of an entity that are not typically available to an HP APM user.

> A user may already be able to view or edit data in an application entity if, for example, the user is the creator of the entity.

For a list of roles that are assigned in an application entity and descriptions of the additional functions they provide, see *Table A-2* on page 39. For descriptions of other roles that can be assigned to a user, see the *HP Application Portfolio Management Analyst's Guide* and the *HP Application Portfolio Management Administrator's Guide.*

HP APM Components

The HP APM interface is a collection of specialized Web pages in PPM Center that offer you a customized view into HP APM. From these pages, you can perform tasks such as creating and searching for entities and responding to surveys or requests for information about applications. You use the PPM Dashboard, another Web page, to view portlets.

HP APM components available for users include the following:

- HP APM–specific pages that you access from the following PPM Center menu bar options:
  - **Open > Application Portfolio.** Used to access the options you select to create application entities, search for and open entities, access saved searches, and review data from grouped entities.
  - **Create > Application.** A shortcut to the page you use to create application entities.
  - **Search > Entities.** A shortcut to the page you use to search for and open HP APM entities of all types.

  For more information, see Chapter 3, *Managing Application Entities,* on page 19.

- PPM Dashboard pages and portlets that contain information of value to a user. Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15, and Appendix B, *PPM Dashboard Pages and Portlets,* on page 65.
- The Browse Entities page—the preliminary page in the Request Browser from which you can group entities for data analysis. You access the Browse Entities page from **Open > Application Portfolio > Analyze > Groups > Group Entities.** For information about using the Request Browser and browse entities page, see the *HP Application Portfolio Management Analyst's Guide* and the *HP Demand Management User's Guide.*

For information about the PPM Center interface and components, see the *Getting Started* guide.

Guidelines for Building Your Application Portfolio

Your application portfolio consists of applications and their relationships to the business objectives and processes used by your organization.

Follow these guidelines to build an application portfolio:

1. Ask the HP APM administrator to create the users who will serve as points of reference for the applications you manage. These users could be business owners, technical owners, IT contacts, budget and benefits managers, subject matter experts, reviewers, respondents, resources, and sponsors of an entity.
2. Collect information about your applications, and then create application entities and add the entities to your application portfolio inventory.

   Before you create an application entity, you should understand the relationships that the HP APM analyst has configured for your organization (for example, the business objectives and processes).

   The application information you should collect includes system information, names used for the application, versions, and contact information. It should also include details about the business environment, technical environment, budget and resources, service and support, and usage and scale of the application. Application information should also include the applications' relationships with processes, organizations, and other applications.

Application information can be imported by an HP APM analyst or administrator from a Microsoft Excel spreadsheet using the PPM Data Migrator for Microsoft Excel. For information about the Data Migrator, see the *HP Application Portfolio Management Analyst's Guide.*

Guidelines for Using the PPM Center Documentation

This guide describes features and components of HP APM available to you as an HP APM user. It also provides instructions about how to perform tasks specific to HP APM.

Note the following:

- This guide documents the default user interface for HP APM. Your HP APM administrator might have customized the fields and pages to best suit your business needs and requirements. These customizations are not documented in this guide.
- Entities are a type of PPM Center request. They are unique to HP APM.
- On some PPM Center and HP APM pages, you might see the HP APM entities divided into three categories: Entities, Activities, and Grouping. In this guide, if the term *entity* does not specifically say *application entity*, it applies to all types of HP APM entities, regardless of the categories in which they are located. For example, if the instructions tell you to select an entity from the Entities area of the Search Entities page, you might instead find the entity in the Activities or Grouping area.

Throughout this guide, you are referred to PPM Center documents for instructions or additional information because many HP APM tasks can also be performed from PPM Center menu bar options. Because of this, you might need to make minor adjustments to the instructions given in the PPM Center documents.

Be aware of the following:

- Since an entity is a type of PPM Center request, in many cases you will need to use the instructions in the PPM Center documents for performing the necessary task for a *PPM Center request*. For example, to perform a basic *entity* search, you follow the instructions for performing a basic *request* search. These terms are usually interchangeable.
- When the instructions tell you to select an option from the **Open** menu on the menu bar, you might need to substitute **Application Portfolio** for the name of the submenu. For example, the instructions for running a saved search in the *Getting Started* guide tell you to select **Open >** ***Demand Management*** **> Saved Searches > Manage Saved Searches**. To run a saved search in HP APM, you must substitute **Application Portfolio** for **Demand Management** —this means you select **Open >** ***Application Portfolio*** **> Saved Searches > Manage Saved Searches** to run a saved search.
- When you are following the PPM Center instructions, an additional page might open. For example, when you create an application entity from the **Open > Application Portfolio > Create Entities** option, the Create New Entity page opens. This is an HP APM–specific page, so it is not mentioned in the PPM Center instructions. In this case, you should select **Application** from the Entities area and then continue following the instructions as written in the PPM Center document. If the Create New Request page opens, select **Application** from the **Request Type** drop-down list, and then continue following the instructions as written.
- You will not have access to all the menus and options described in the referenced PPM Center documents. Your view of PPM Center and HP APM is determined by the implementation of your PPM Center, your HP APM role, and the level of access to features and data you are given by the HP APM administrator. The set of pages, portlets, and fields that you see may be different from that of another analyst, depending on the level of access provided to you.

Getting Help Online

You can easily access descriptions of many of the fields you see in HP APM portlets and Web pages. When a help icon is displayed on a portlet or Web page, click it to display descriptions of the fields in the area in which the icon is located.

Related Documents

The following PPM Center documents are referenced in this guide, provide additional information related to tasks performed by HP APM users:

- *Getting Started*
- *HP Application Portfolio Management Administrator's Guide*
- *HP Application Portfolio Management Analyst's Guide.*
- *HP Demand Management User's Guide*
- *HP Financial Management User's Guide*

These documents are available from the HP Software Product Manuals Web site at h20230.www2.hp.com/selfsolve/manuals.

2 Managing the PPM Dashboard and Portlets

Overview of PPM Dashboards and Portlets

Use the PPM Dashboard, PPM Dashboard pages and portlets to create views that allow you to easily track the applications that you own, surveys to which you have been asked to respond, and applications for which you have been asked to provide information.

- *PPM Dashboard and PPM Dashboard Pages*. You can group and display portlets on a PPM Dashboard page (that you access from the PPM Dashboard) for a real-time view of important information about your application portfolio.
- *Portlets*. You can configure portlets to display standard and customizable real-time views of your application portfolio data.

PPM Dashboard and PPM Dashboard Pages

The PPM Dashboard provides the core of the standard user interface. It is a real-time Web page view into your application portfolio.

The PPM Dashboard pages that provide you with accurate, up-to-the-minute, status information about your applications and deliverables are displayed on the PPM Dashboard. You can use the PPM Dashboard pages to organize your application data.

Two types of PPM Dashboard pages are available for users in HP Application Portfolio Management (HP APM): shared and private.

- Shared PPM Dashboard pages are preconfigured PPM Dashboard pages provided by HP APM or configured by the HP APM administrator. They cannot be edited. Shared PPM Dashboard pages contain entity-related portlets.

  Shared PPM Dashboard pages are also known as HP-supplied PPM Dashboard pages.

- Private PPM Dashboard pages are created and configured by you. You can add portlets to a private page, move the private page up or down in the list of pages, and delete it. You can also configure the information displayed in the portlets that you add to private pages.

For descriptions of the shared and private PPM Dashboard pages and portlets provided for HP APM users, see the Appendix B, *PPM Dashboard Pages and Portlets,* on page 65. For descriptions of the different types of PPM Dashboard pages and instructions for personalizing your private PPM Dashboard and for managing the PPM Dashboard, see the *Getting Started* guide.

Portlets

Portlets reside on PPM Dashboard pages. They display real-time information relevant to your application portfolio. You can drill down on the data displayed in many of the portlets to view additional details. Two types of portlets are available for users in HP APM: shared and configurable.

- Shared portlets are preconfigured portlets provided by HP APM or configured by the HP APM administrator. You can edit them only if you copy them to a private PPM Dashboard page.
- Configurable portlets are the portlets that you can add to a private PPM Dashboard page and personalize. These portlets are highly configurable, enabling you to filter through all the data in the system to display the information you need. HP provides several portlets that you

can configure. For information about personalizing portlets, see the *Getting Started* guide.

To add a portlet that is described in this guide to your private PPM Dashboard, search for and select a portlet from the **Application Portfolio** category when following the instructions for adding a portlet in the *Getting Started* guide.

For descriptions of the shared and configurable portlets provided for a user, see the online Help and Appendix B, *PPM Dashboard Pages and Portlets,* on page 65.

3 Managing Application Entities

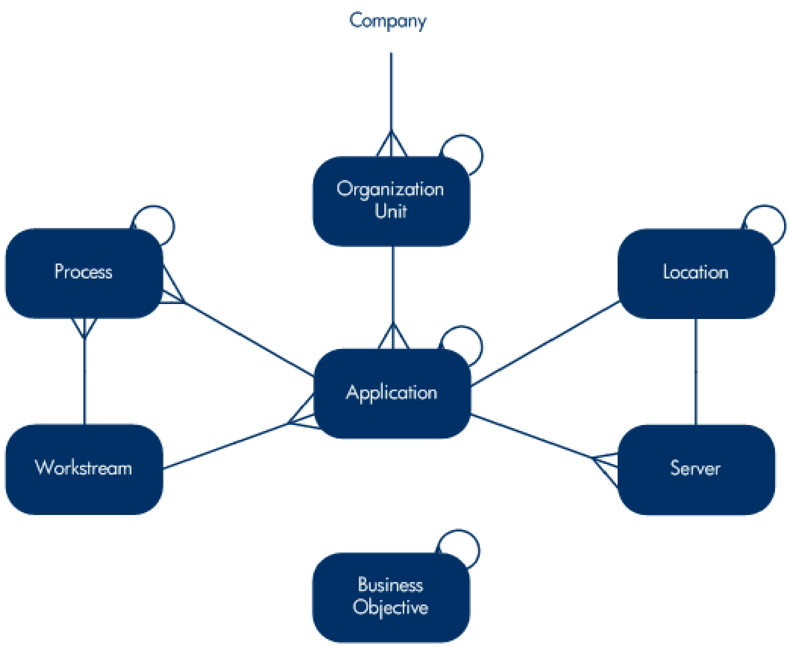
Application Entity Overview

In HP Application Portfolio Management (HP APM), entities are the means by which actions and processes are initiated and tracked. They are the building blocks of an application portfolio. Entities contain all of the information necessary to take a series of actions and move through a workflow. They are used to identify objects and designate the relationships and interactions within an organization. An HP APM entity is a type of HP Project and Portfolio Management Center (PPM Center) request.

As a user, you can help build an application portfolio by creating *application* entities for your organization. Application entities are for software applications or programs that implement a business process or function in your organization. An application can be made up of one or more distinct services.

Figure 3-1 shows the relationships that can exist between entities in an HP APM user's application portfolio.

Figure 3-1. Entity relationships



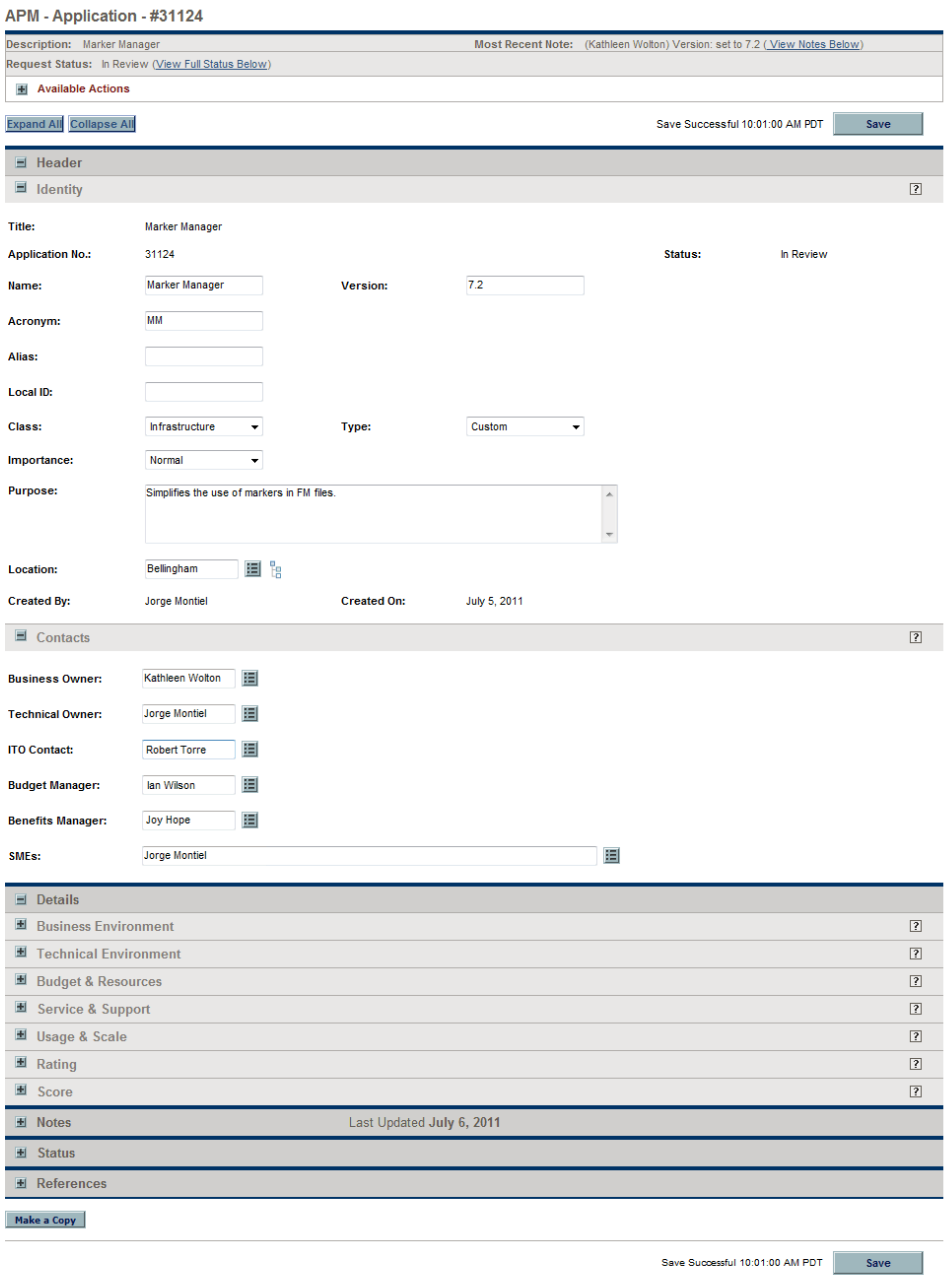
Application Entity Detail Page

When you create or view an application entity, you use the entity's detail page. The detail page contains all of the information about the entity. It is where decisions and actions that pertain to the entity are executed.

Figure 3-2 shows an application entity detail page and its main sections with the Identity, Contacts, and Details sections expanded. The entity detail page for an application entity is similar to the detail page for a request. For descriptions of the main sections on a request detail page, see the *HP Demand Management User's Guide.*

For detailed descriptions of the sections and fields unique to the detail page for an application entity, see Appendix A, *Application Entities,* on page 33. If your organization's implementation of HP APM provides you with access to additional entities (such as workstreams or processes) or fields, see the *HP Application Portfolio Management Analyst's Guide* for descriptions.

Figure 3-2. Application entity detail page with several expanded sections



Managing Entities

Because an HP APM entity is a type of PPM Center request, managing an entity is typically the same as managing a request. For information about managing entities, see the following sections:

- *Creating Application Entities*
- *Opening Entities*
- *Searching Entities*
- *Editing Entities*

For instructions for creating, opening, searching, editing, and monitoring entities, see the *HP Demand Management User's Guide*.

For additional information about entities, see the *HP Application Portfolio Management User's Guide.* For guidelines for using the instructions in the PPM Center documentation for performing HP APM tasks, see *Guidelines for Using the PPM Center Documentation* on page 17.

Creating Application Entities

The first step in building your application portfolio is to create the entities that make up the portfolio. While it is possible to build your portfolio from just applications, designating relationships with other entities, servers, and organization units when your user configuration allows it provides the ability to conduct a more detailed and quantifiable analysis for the application.

➤ Before you create an application entity, you should understand the relationships that the HP APM analyst has configured for your organization (for example, the business objectives and processes).

You create a new entity from one of the following locations:

- The **Open > Application Portfolio > Create Entities** option on the menu bar
- The **Create > Application** option on the menu bar (a shortcut for creating an application entity)

- The **References** section on an entity detail page
- The **Make a Copy** button on an entity detail page

The HP APM analyst can create entities by importing them into HP APM using the PPM Data Migrator for Microsoft Excel (Data Migrator). For instructions, see the *HP Application Portfolio Management Analyst's Guide.*

When you create an entity, it is automatically assigned a unique number and tracked from start to finish. This ensures completion and accountability for all steps within the entity's workflow.

To create an application entity, see the instructions for creating a *request* in the *HP Demand Management User's Guide*.

For descriptions of the fields that could be available for an application entity, see Appendix A, *Application Entities,* on page 33 of this guide and the online Help available from each section of the entity page.

Opening Entities

You can open an entity from the result of a search, from a portlet, from an email notification, or from the search box. For more information, see *Searching Entities* and the *HP Demand Management User's Guide.*

Searching Entities

There are several ways you can search for entities. You can perform a basic entity search or use the query builder to create a custom search query that uses comparison and logical operators. You can use the results of a search you perform with the Request Browser to create entity groups that you can use to display and track information.

You can also perform a simple search using the search box that is located in the upper-right corner of the PPM Center interface. Use the search box to quickly access an entity (by typing the entity—or request—number) or a menu item (by typing any part of the menu name to display a list of corresponding menu items).

After you have performed a search, you can save it and run it again.

For instructions for searching entities and using the query builder, see the *Getting Started* guide and the *HP Demand Management User's Guide*. For information about using a Request Browser search to create entity groups, see the example in the *HP Application Portfolio Management Analyst's Guide* and the instructions in the *HP Demand Management User's Guide*.

You can also search for entities from the **Search > Entities** and **Open > Application Portfolio > Search Entities** options on the menu bar.

Editing Entities

You can make changes to an entity if you created the entity or if you are assigned a role that allows you to do so.

There are several ways you can update an entity. You can perform a basic edit, perform a quick edit to edit multiple entities at the same time, or perform a mass update to make the same edit to multiple entities at the same time. For instructions, see the *HP Demand Management User's Guide*.

If two users edit the same entity at the same time and both click **Save,** HP APM attempts to save the changes made by both users. If a change cannot be saved, HP APM advises the user who made the change to make the change again, and then attempt to save it again. The following examples demonstrate how HP APM handles simultaneous users.

Example: Two Users Editing Same Fields

Two users, Otumbo and Monette, are working in different locations and editing the same application entity.

- Otumbo makes changes to the Version and Acronym fields, and adds text to the Notes field.
- Monette makes changes to the Version and Alias fields, and adds text to the Notes field.

1. Otumbo clicks **Save** first.

   All of Otumbo's changes are saved.

2. Monette clicks **Save** next.

   Monette's notes are saved, but a message at the top of the page informs her that another user has made changes to the application entity and displays the changes. Monette must re-enter her changes to the Version and Alias fields.

3. Monette again changes values in the Version and Alias fields, and then clicks **Save.**

   Monette's changes are saved.

Example: Two Users Editing Fields Plus Workflow Action

Two users, Otumbo and Monette, are working in different locations and editing the same entity. They both have permission to move the entity to its next workflow step.

1. Otumbo adds a note to the entity's Notes section, and then clicks the workflow action button.

   Otumbo's changes are saved and the entity advances along its workflow.

2. Monette adds an attachment to the entity, and then clicks the workflow action button.

   The attachment to the entity is saved, but a message at the top of the page informs Monette that the workflow action she attempted has already been performed. No further action is necessary.

Example: Parallel Workflow Step

Otumbo and Monette are editing the same entity that is being processed along parallel branches of a workflow. Both users can process the entity along these parallel branches independently without problems.

Monitoring Entities

Use the following HP APM features to monitor and locate entities that require attention:

- **Searches.** If you are monitoring or want to locate a specific entity, you can search for the entity. For information about search, see *Searching Entities* on page 23 and the *HP Demand Management User's Guide*.
- **Portlets.** Portlets provide you with real-time views into your HP APM–based activities. For example, the My Applications portlet provides a list of applications that you created or own and the My Surveys portlet provides a list of surveys to which you have been asked to respond. You can customize portlets to track and assess the data that is meaningful to you. For more information about portlets, see *Portlets* on page 16 and Appendix B, *PPM Dashboard Pages and Portlets,* on page 65.
- **Notifications.** Some workflow steps are configured to send email notifications upon activation. As an entity proceeds through its workflow steps, email notifications might be sent to notify you of pending actions. The notification might include a link that you can click to open the referenced entity. For more information, see the *HP Demand Management User's Guide*.

4 Responding to Surveys and Information Requests

Survey and Information Request Overview

As an HP Application Portfolio Management (HP APM) user, you might be asked to complete a survey that asks you to provide rating information for an application you own or use. Surveys contain a set of questions that help the analyst evaluate and assess the applications used by your organization. You might also be asked to provide information about the application itself.

Completing Surveys

After an application entity has been created, the HP APM analyst might request that the owner and one or more users of the application complete a survey that rates the application. As the recipient of a survey, your role becomes that of the survey respondent.

When you are a survey respondent, the following occurs:

- An automated email message is sent to you containing a link to the survey.
- The survey is listed in the Surveys Requiring My Input portlet on the Front Page of your shared PPM Dashboard page. If you have added a My Surveys portlet to your private PPM Dashboard page, it is also listed there. For information about these portlets, see *Table B-1* on page 67 and *My Surveys* on page 74.
- If you do not respond to the survey within the defined number of days (typically 3), the automated email message is sent to you again.

If you are asked to complete a survey and need the assistance of another user, you can send the survey to a different user by designating the new user as a proxy. This process is described in *Sending a Survey to a Another User* on page 30.

Accessing a Survey Assigned to You

To access a survey that you have been asked to complete, do one of the following:

- In the email message that asks you to provide information about the application, click the link to the survey.

  You must be logged on to HP Project and Portfolio Management Center (PPM Center) to display the survey.

- In the **Surveys Requiring My Input** portlet on the Front Page of your shared PPM Dashboard, click the link to the survey.
- In the **My Surveys** portlet on your private PPM Dashboard page, click the link to the survey.

Responding to a Survey

To respond to a survey request:

If you are not able to complete the survey, you can click **Save** at any time to save your entries and return to finish the survey later.

1. Open the survey using one of the methods described in *Accessing a Survey Assigned to You* on page 28.

   To see information about the application to which this survey applies, click **View Application Detail** in the **Summary** section of the survey.

2. Click **Expand All** to open all of the sections.
3. Scroll to the **Existing Notes** section to view any special instructions that you should follow when completing the survey.

4. In the **Questionnaire** section, complete the survey by selecting the appropriate response from each of the drop-down lists—or for the fields you were asked to complete, if you were instructed to complete specific fields. For descriptions of the fields in the **Questionnaire** section, see the online help or *Rating* on page 50.

5. To provide information about areas needing improvement and additional feedback, type your comments in one or both of the fields in the **Comments** section.

6. To add a note to be shared with other users, type it in the **Notes to be added on save** field.

7. To view information about the workflow associated with this application, click the links in the **Status** section.

8. You can reference a Web-accessible file or another entity. You can also attach a document or file from your local machine to the current entity.

   To add reference material:

   a. Select the reference type from the **New Reference** drop-down list.

   b. Click **Add.**

   c. Complete the fields that are displayed.

   For instructions for configuring the **References** section, see the *HP Demand Management User's Guide*.

9. When you (and the proxy, if a proxy is assigned to this survey) have completed the survey, return to the top of the survey and click **Survey Completed.**

   The completed survey is displayed. The survey is removed from the Surveys Requiring My Input portlet on your PPM Dashboard and on the proxy's PPM Dashboard, if a proxy was assigned.

Sending a Survey to a Another User

If you need assistance completing a survey, you can send the survey to another user—called the proxy. The survey remains in the Surveys Requiring My Input portlet on your PPM Dashboard until it is completed by either you or the proxy.

To assign a proxy:

1. Open the survey. For instructions, see *Accessing a Survey Assigned to You* on page 28.
2. Click **Send to Proxy.**

   The Send to Proxy page opens.
3. In the **Assigned Proxy** list, type or select the name of the user to act as your proxy.
4. In the **Notes for Action: Send to Proxy** field, type the reason you are sending the survey to the proxy and any special instructions the proxy should follow.
5. Click **Continue Workflow Action.**

   The note you entered in the previous step is added to the Existing Notes section, the name of the proxy is added to the Summary section, an email message with a link to the survey is sent to the proxy, and the survey is again displayed.
6. You can continue to work on the survey or return to the PPM Dashboard to work on other tasks.

Responding to Requests for Application Information

If information about an application is missing, an HP APM analyst might ask you to supply it. Users asked to supply additional information about applications are called respondents. As a respondent, you can view and edit information in all sections of an application.

When you are a respondent, the following occurs:

- An automated email message is sent to you containing a link to the application for which you need to provide information. This message also contains instructions or notes about the information that you need to provide.
- The application and any notes or special instructions from the analyst are listed in the Applications Requiring My Input portlet on your PPM Dashboard. For information about this portlet, see *Table B-1* on page 67.

Accessing an Application in Need of Additional Information

To access an application for which you have been asked to provide information, do one of the following:

- In the email message that asks you to provide information about the application, click the link to the application.

> You must be logged on to PPM Center to display the application.

- In the **Applications Requiring My Input** portlet on the PPM Dashboard, click the link to the application.

Responding to a Request for Additional Information

To respond to a request for additional information about an application:

1. Open the application using one of the methods described in *Accessing an Application in Need of Additional Information* on page 31.
2. Click **Expand All** to open all of the sections.
3. Scroll to the **Respondent Notes** field in the **Contacts** section to view instructions about the information you need to provide.

If you are not able to provide all of the requested information now, you can click **Save** at any time to save your entries and return later to finish responding.

4. Complete the requested fields and add comments, if necessary. For descriptions of the fields, see the online help and Chapter 3, *Managing Application Entities,* on page 19.
5. When you are finished, return to the top of the survey and click **Completed.**

   The application is displayed.

A Application Entities

Application Entity Overview

HP Application Portfolio Management (HP APM) provides several types of entities. The types of entities and the sections and fields that are available to you in an entity depend on the type of HP APM user you are and the role or roles assigned to you. While HP APM analysts could have access to all types of entities, HP APM users typically have access to only application entities—and to some or all of the sections within an application entity.

➤ You are able to view and edit all sections of entities that you create and entities for which you are the owner.

Depending on your organization’s implementation of HP APM, the fields available to you within an application entity might be different from the fields described in this appendix. If your organization’s implementation of HP APM provides you with access to additional entities or fields, see the *HP Application Portfolio Management Analyst’s Guide* for their descriptions.

This appendix provides information about application entities, including descriptions of the application entity fields by section. Refer to this appendix and the online help for field-level information when you are creating, searching for, or updating an application entity.

For additional information about application entities, including how to perform tasks such as creating, searching, and editing entities, see Chapter 3, *Managing Application Entities,* on page 19.

Application Entity Sections

The following sections are included in an application entity. When creating, searching for, or editing an application entity, you enter or update information in one or more of these sections. Descriptions of each section and the fields they contain are provided in this appendix.

- *Identity*. The fundamental information that identifies the application.
- *Contacts*. The key contacts and stakeholders of the application.
- *Business Environment*. The critical business properties of the application.
- *Technical Environment*. The technologies used in the construction of the application, connectivity to other systems, and planned disposition.
- *Budget & Resources*. The forecast and actual costs, financial benefits, and average headcount supporting the application.
- *Service & Support*. The supporting environment and quality issues.
- *Usage & Scale*. The usage-based size measurements.
- *Rating*. The subjective measurements that reflect the business view of the application. These measurements are relative to the overall enterprise application portfolio.
- *Score*. The computed scores and adjustment factor for the total score.

➤ The application entity also has Notes, Status, and References sections. For descriptions of these sections, see the description of the request details page in the *HP Demand Management User's Guide.*

Identity

In the Identity section, enter the fundamental information that identifies the application.

➤ The Identity section is a subsection of the Header section.

All users can view the data in this section. Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-1. Application Identity section

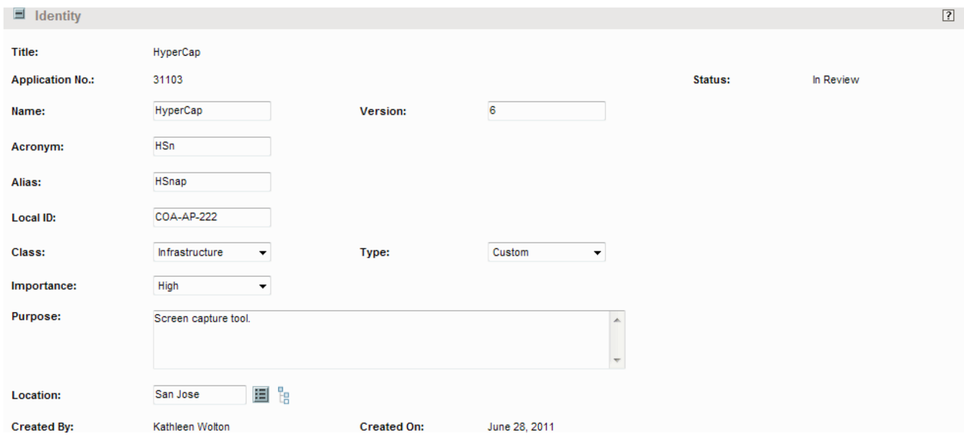


Table A-1. Application Identity fields (page 1 of 4)

Field (*Required)	Description
Title	Read-only. The Title is automatically set to the application Name.
Application No.	Read-only. A unique numeric identifier of the application.

Table A-1. Application Identity fields (page 2 of 4)

Field (*Required)	Description
Status	Read-only. The status of the application. • **New** - The application is being defined but has not been submitted. • **In Review** - The application details are currently under review as part of an assessment or data collection process. • **Need More Info** - Additional information has been requested from the named respondent for the application. • **Active** - The application is active and currently being managed by its owners. • **Snapshot** - This is a static copy of the application information captured on a specific date. • **Retired** - The application is no longer active. It has been decommissioned or has reached end-of-life and assessment is no longer needed. • **Cancelled** - The application entity has been cancelled and its information is no longer valid.
*Name	A name given to the application that distinguishes it from other applications. The name must be unique in order to transition the application from In Review to Active status.
Version	The version information associated with the application.
Acronym	The acronym assigned to the application. Typically, this is defined by the organization most involved with the application.
Alias	An additional name assigned to the application.
Local ID	A unique identifier for the application from a client-operated inventory system, if applicable.

Table A-1. Application Identity fields (page 3 of 4)

Field (*Required)	Description
Class	The high-level purpose of the application. • **Infrastructure** - An application that is used to support a system, such as a database, scheduler, or security monitor. • **Informational** - An application that is used to store, communicate, or manipulate data, such as data storage or reporting. • **Transactional** - An application that requires an act or process to be completed, such as order entry and payments.
Type	The high-level origin of the application. • **ASP** - Application Service Provider. An application that is hosted and supported by an external organization and accessed over a network. • **Custom** - An application that has been designed specifically for the organization. • **COTS** - Commercial, Off-the-Shelf. An application that is developed by an ISV and customized for the organization. • **Composite** - COTS and Custom. An application that consists of heterogeneous systems (COTS and/or custom) that are integrated together.
Importance	The importance of the application to the enterprise. • **Low** - The application is rarely used and does not affect the performance and functioning of the organization. • **Normal** - The application is used averagely and may or may not affect the performance and functioning of the organization. • **High** - The application is widely used and may affect the performance and functioning of the organization. • **Critical** - The application is required for the performance and functioning of the organization.
Purpose	The business or technical objective or function of the application.
Location	The physical location of the production application.

Table A-1. Application Identity fields (page 4 of 4)

Field (*Required)	Description
Created By	Read-only. The full name of the user who created the application entity.
Created On	Read-only. The date on which the application entity was created.

Contacts

In the Contacts section, enter the key contacts and stakeholders of the application.

The Contacts section is a subsection of the Header section.

All users can view the data in this section. Users assigned one more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

The application entity fields that users can view and edit are based on the roles to which the users are assigned in this section. For additional information about user roles, see *The Role of the User* on page 9.

Figure A-2. Application Contacts section

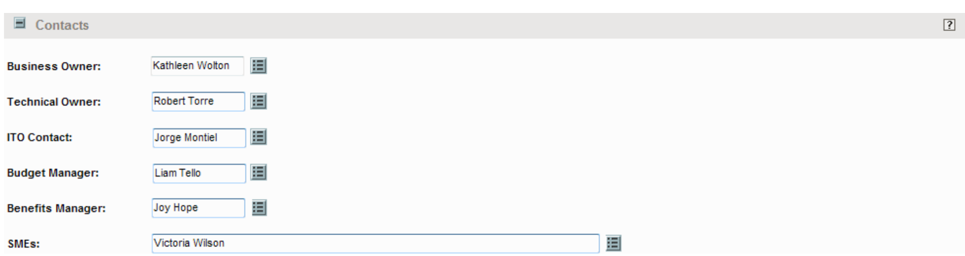


Table A-2. Application Contacts fields (page 1 of 2)

Field	Description
Business Owner	The full name of the primary person with business authority for the application. If the user does not already have this ability, the Business Owner can view and edit application information in *all* sections.
Technical Owner	The full name of the primary person with technical authority for the application. If the user does not already have this ability, the Technical Owner can view and edit application information in the Header, Business Environment, Technical Environment, Service & Support, Usage & Scale, Rating, and Score sections.
ITO Contact	The full name of the primary person to contact regarding the infrastructure supporting the application. No additional abilities are added for this role. (All users, regardless of whether they are assigned a role, can view application information in the Header, Business Environment, Technical Environment, and Usage & Scale sections.)
Budget Manager	The full name of the person who is authorized to record the forecasted and actual costs for the application. If the user does not already have this ability, the Budget Manager can view application information in the Header, Business Environment, Technical Environment, Budget & Resources, and Usage & Scale sections. The Budget Manager can also view and edit budget information that is accessed from the Financial Summary link in the Budget & Resources section.
Benefits Manager	The full name of the person who is authorized to record the financial benefits of the application. If the user does not already have this ability, the Benefits Manager can view application information in the Header, Business Environment, Technical Environment, Budget & Resources, and Usage & Scale sections. The Benefits Manager can also view and edit benefits information that is accessed from the Financial Summary link in the Budget & Resources section.

Table A-2. Application Contacts fields (page 2 of 2)

Field	Description
Respondent	The full name of the user asked to supply additional information about this application. If the user does not already have this ability, the Respondent can view and edit application information in *all* sections. This field is required when more information is requested for an entity.
Respondent Note	Comments that are emailed to the respondent when additional information about the application is requested.
SMEs	Zero, one, or more full names of the subject matter experts (SMEs)—or acknowledged specialists—for the application. If the user does not already have this ability, the SME can view application information in the Header, Business Environment, Technical Environment, Usage & Scale, Rating, and Score sections.

Business Environment

In the Business Environment section, enter the critical business properties of the application.

All users can view the data in this section. Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-3. Application Business Environment section

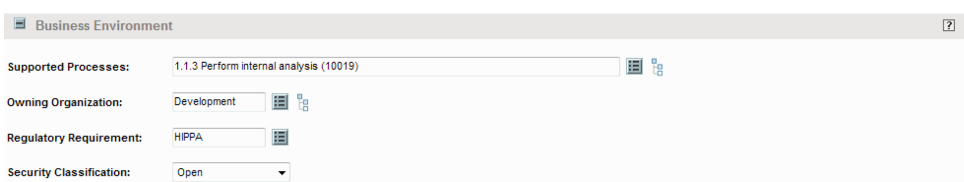


Table A-3. Application Business Environment fields (page 1 of 2)

Field	Description
Supported Processes	Zero, one, or more business processes that are supported by the application.
Owning Organization	The name of the organization with business ownership of the application.Organization units are created in HP Project and Portfolio Management Center (PPM Center). (For instructions for creating organization units, see the *HP Resource Management User’s Guide*.)
Regulatory Requirement	Zero, one, or more compliance requirements for the application. • **SOX** - Sarbanes-Oxley Act. United States regulations for corporate financial accounting. • **FERC** - Federal Energy Regulatory Commission. United States regulations for energy transmission. • **NERC** - North American Electric Reliability Corporation. North American regulations for energy transmission. • **CPCU** - Chartered Property Casualty Underwriter. Professional designation in the insurance industry. • **CAISO** - California Independent System Operator. Regulations for California's power grid. • **HIPAA** - Health Insurance Portability and Accountability Act. Regulations for privacy of personal information. • **PCI** - Payment Card Industry Data Security Standard. Standards for the payment card industry.

Table A-3. Application Business Environment fields (page 2 of 2)

Field	Description
Security Classification	The highest security level designated for the components of this application. That is, if the components of this application have different security classifications, select the highest classification. • **Open** - Contains information with no access constraints. Unusual in a business context unless providing support for open source development. • **Internal** - Contains information for which access is restricted to users within an organization. • **Limited -** Contains information for which access is restricted to a defined set of users. • **Confidential** - Contains sensitive corporate information. • **Secret** - Contains information for which improper release may damage the organization. • **Top Secret** - In a military or government context, contains information for which access is strictly controlled. • **Above Top Secret** - Contains extremely sensitive information.

Technical Environment

In the Technical Environment section, enter the technologies used in the construction of the application, connectivity to other systems, and planned disposition.

All users can view the data in this section. Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-4. Application Technical Environment section

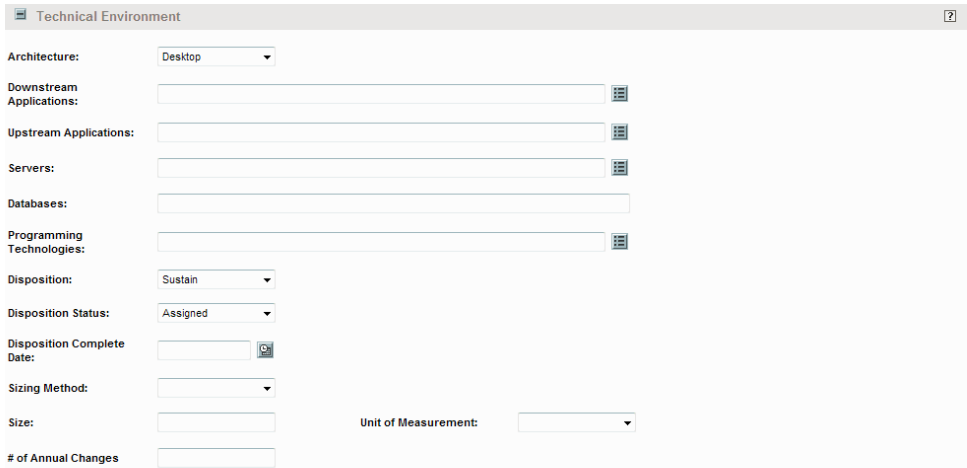


Table A-4. Application Technical Environment fields (page 1 of 3)

Field	Description
Architecture	The type of system on which the application is deployed. • Mainframe • Distributed • Desktop • Other
Downstream Applications	Zero, one, or more applications that depend on this application's output or updates.
Upstream Applications	Zero, one, or more applications that produce output or updates on which this application depends.
Servers	The names of the servers on which the application is deployed.
Databases	The names of the databases which the application uses.
Programming Technologies	Zero, one, or more programming, scripting, or descriptive languages or technologies that are used to construct the application.

Table A-4. Application Technical Environment fields (page 2 of 3)

Field	Description
Disposition	The next planned step in the lifecycle of the application. • **Invest** - Keep and enhance. • **Sustain** - Keep and maintain. • **Sunset** - Keep but plan for replacement. • **Decommission** - Retire.
Disposition Status	The progress of the selected disposition. • **Proposed** - The disposition of the application needs review. • **Assigned** - The disposition of the application has been assigned an owner. • **In-Progress** - The disposition of the application is currently ongoing. • **Complete** - The disposition of the application has been concluded.
Disposition Complete Date	The date on which the disposition of the application is planned to be completed.
Sizing Method	Methodology used to compute the size of the application. • **IFPUG Counting** - International Function Point Users Group function point counting. • **Backfired** - Function point counting based on lines of code. • **Use Case Point Counting** - Function point counting based on use cases. • **Logical LOC Counting** - Lines of code. • **Custom Method** - Other method to compute the size of the application.

Table A-4. Application Technical Environment fields (page 3 of 3)

Field	Description
Size	The measurement based on the sizing method.
Unit of Measurement	The unit of measurement for the sizing method. • Number of Pages • Kilo Lines of Code • Unadjusted Function Points • ABAP Feature Points • Siebel Function Points • Adjusted Use Case Point • Number of Test Cases
# of Annual Changes	The number of change requests submitted per year.

Budget & Resources

In the Budget & Resources section, enter the forecast and actual costs, financial benefits, and average headcount supporting the application.

Users assigned one or more of the following roles can view the data in this section: Business Owner, Budget Manager, Benefits Manager, or Respondent (when more information is requested). Users assigned one or more of the following roles can edit the data in this section: Business Owner or Respondent (when more information is requested).

Figure A-5. Application Budget & Resources section

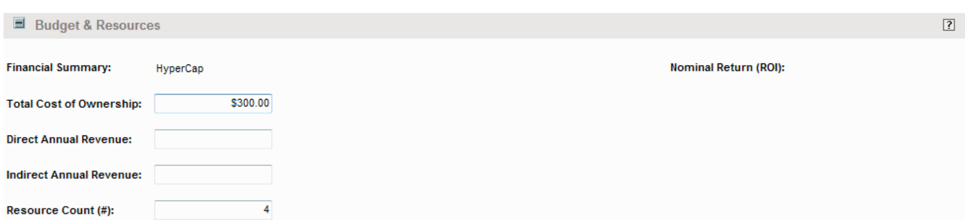


Table A-5. Application Budget & Resources fields

Field	Description
Financial Summary	A link to the financial summary of the application. The financial summary captures monthly forecast and actual costs and benefits. Only application entities and transformation proposals have a financial summary. Each application entity has its own financial summary; each transformation proposal has its own financial summary. A financial summary cannot exist independently (it must have a parent entity). For more information about financial summaries, see the *HP Financial Management User's Guide*.
Nominal Return (ROI)	The difference between total planned benefits (revenue) and total planned costs. Nominal Return = Total Planned Benefits - Total Planned Costs
Total Cost of Ownership	The total cost to own and operate the application, including direct and indirect costs.
Direct Annual Revenue	The amount of annual revenue the application contributes to the enterprise.
Indirect Annual Revenue	The amount of annual revenue that can be attributed to the application through a sharing function.
Resource Count (#)	The average number of resources supporting the application at any one time.

Service & Support

In the Service & Support section, enter the supporting environment and quality issues.

Users assigned one or more of the following roles can view and edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-6. Application Service & Support section

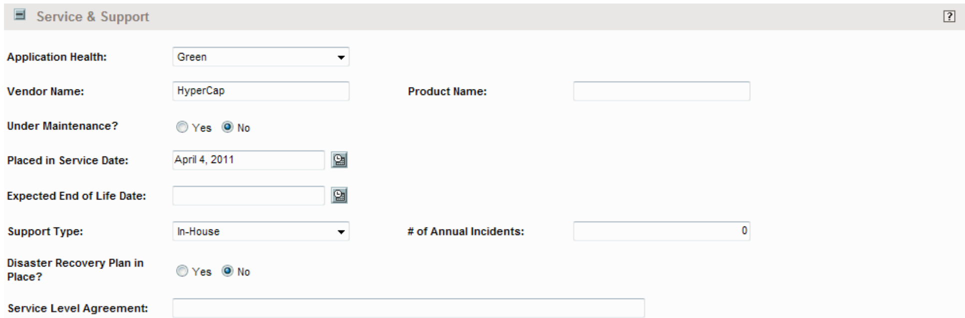


Table A-6. Application Service & Support fields (page 1 of 2)

Field	Description
Application Health	A color-coded indicator of the application's health. • **Red** - Risks identified that may have adverse impact • **Yellow** - Issues identified, but being managed • **Green** - No issues exist
Vendor Name	The vendor of the application.
Product Name	The product name of the application.
Under Maintenance?	Indicates if the application has a current maintenance contract.
Placed in Service Date	The deployment date of the application to production.
Expected End of Life Date	The expected retirement date of the application. Typically this does not apply to a specific version of the application but to the application itself.
Support Type	The type of support contract. • **In-House** - Maintenance is provided by the organization. • **Vendor** - Maintenance is provided by the vendor of the application. • **3rd Party** - Maintenance is provided by another source that is not in-house nor the vendor (for example, a contractor). • **None** - No maintenance is provide.

Table A-6. Application Service & Support fields (page 2 of 2)

Field	Description
# of Annual Incidents	The number of incidents for the application tracked in a year.
Disaster Recovery Plan in Place?	Indicates if the application has a disaster recovery plan.
Service Level Agreement	The service level specified in the application's service contract. For example, guaranteed uptime, performance periods (24 hours for five days a week), or percentage of dropped calls.

Usage & Scale

In the Usage & Scale section, enter the usage-based size measurements.

All users can view the data in this section. Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-7. Application Usage & Scale section

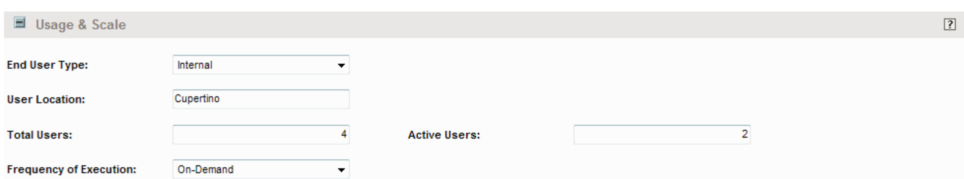


Table A-7. Application Usage & Scale fields

Field	Description
End User Type	The class of the user that operates the application. • **Internal** - Employees • **External** - Clients • **All** - Both employees and clients
User Location	The geographical or organizational distribution of users. For example, North America or Marketing.
Total Users	The size of the user community of the application.
Active Users	The average number of active users during standard operation of the application.
Frequency of Execution	How often the application is run or is accessible. • **Online** - Application is online 24x7, and may be accessed at anytime. • **Asynchronous** - Application is run or accessed based on an asynchronous event or activity. • **On-Demand** - Application is run and accessed only when needed. • **Nightly** - Application is run on a nightly basis, generally as a batch process. • **Weekly** - Application is run on a weekly basis. • **Monthly** - Application is run on a monthly basis. • **Quarterly** - Application is run once a quarter. • **Yearly** - Application is run once a year.

Rating

In the Rating section, enter subjective measurements that reflect the business view of the application. These measurements are relative to the overall enterprise application portfolio.

Users assigned one or more of the following roles can view the data in this section: Business Owner, Technical Owner, Respondent (when more information is requested), or SME (subject matter expert). Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-8. Application Rating section

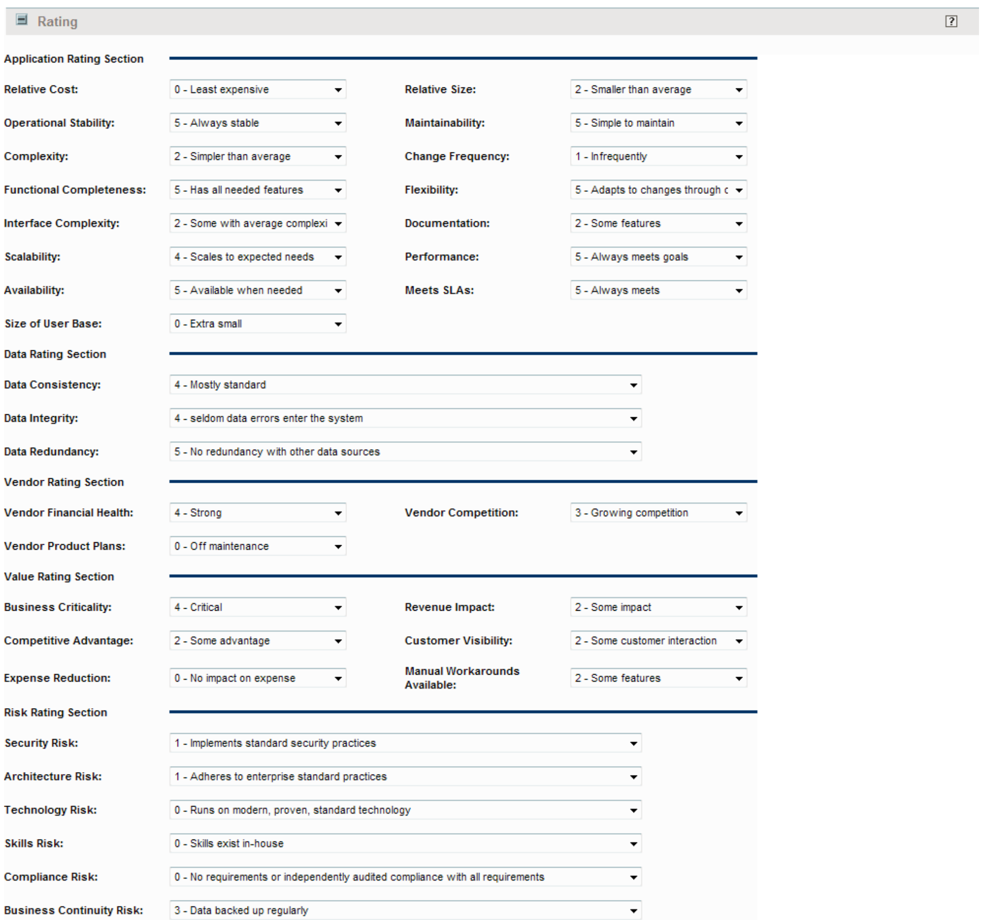


Table A-8. Application Rating fields (page 1 of 10)

Field	Description
Relative Cost	The total cost of the application compared to other applications in the portfolio (including licenses, underlying hardware costs, minor enhancements, and support). • 0 - Least expensive • 1 - Inexpensive • 2 - Less than average • 3 - More than average • 4 - Expensive • 5 - Most expensive
Relative Size	The size of the application compared to the size of the typical application in the portfolio. • 0 - Extra small • 1 - Small • 2 - Smaller than average • 3 - Larger than average • 4 - Large • 5 - Extra large
Operational Stability	The reliability and dependability of the application during required operational hours at required locations. • 0 - Most unstable • 1 - Very unstable • 2 - Slightly unstable • 3 - Fairly stable • 4 - Very stable • 5 - Always stable

Table A-8. Application Rating fields (page 2 of 10)

Field	Description
Maintainability	The upkeep of the application compared to other applications in the portfolio. • 0 - Impossible to maintain • 1 - Very difficult • 2 - Some difficulty • 3 - Occasional difficulties • 4 - Easy to maintain • 5 - Simple to maintain
Complexity	The complicatedness and intricacy of the application compared to other applications in the portfolio. Complexity may be related to objective measurements such as the size of the application or the number of connections to other applications. • 0 - Extra simple • 1 - Simple • 2 - Simpler than average • 3 - More complex than average • 4 - Complex • 5 - Extra complex
Change Frequency	The number of times the system changes relative to the amount of change requests and incidents. • 0 - Very rarely • 1 - Infrequently • 2 - Less than average • 3 - More than average • 4 - Frequently • 5 - Excessively

Table A-8. Application Rating fields (page 3 of 10)

Field	Description
Functional Completeness	The satisfaction of business requirements. • 0 - Needs the most work • 1 - Needs some work • 2 - Needs a little work • 3 - Has many features • 4 - Has most needed features • 5 - Has all needed features
Flexibility	The ability to modify the application when requirements change (for example, changes to standards, compliance, or regulations). • 0 - Rigid • 1 - Great effort to adapt to changes • 2 - Significant effort to adapt to changes • 3 - Some effort to adapt to changes • 4 - Little effort to adapt to changes • 5 - Adapts to changes through configuration
Interface Complexity	The changes needed to integrate the application with other applications. • 0 - Self contained (standalone) • 1 - Few and simple • 2 - Some with average complexity • 3 - Some more complex • 4 - Many • 5 - Many or most complex
Documentation	The completeness of the user documentation. • 0 - None • 1 - Little • 2 - Some features • 3 - More features • 4 - Most features • 5 - Complete

Table A-8. Application Rating fields (page 4 of 10)

Field	Description
Scalability	The ability of the application to support fluctuations in demand. • 0 - Cannot scale to expected needs • 1 - Great effort to scale to expected needs • 2 - Some effort to scale to expected needs • 3 - Little effort to scale to expected needs • 4 - Scales to expected needs • 5 - Meets expected needs
Performance	The ability of the application to meet performance goals (for example, response time under maximum load or time to completion). • 0 - Never meets goals • 1 - Seldom meets • 2 - Meets less than average • 3 - Meets more than average • 4 - Usually meets • 5 - Always meets goals
Availability	User accessibility of the application during required operational hours. • 0 - Not available when needed • 1 - Not available when many need it • 2 - Not available when some need it • 3 - Available when some need it • 4 - Available when many need it • 5 - Available when needed

Table A-8. Application Rating fields (page 5 of 10)

Field	Description
Meets SLAs	The ability to meet service level agreements or implicit expectations and needs. • 0 - Never meets • 1 - Seldom meets • 2 - Meets less than average • 3 - Meets more than average • 4 - Usually meets • 5 - Always meets
Size of User Base	The number of users compared to the number of applications in the enterprise. • 0 - Extra small • 1 - Small • 2 - Smaller than average • 3 - Larger than average • 4 - Large • 5 - Extra large
Data Consistency	The alignment of the application's data model with enterprise and industry standards. • 0 - Uses custom data formats and definitions • 1 - Mostly custom • 2 - Some custom • 3 - Some standard • 4 - Mostly standard • 5 - Uses enterprise standard data formats and definitions

Table A-8. Application Rating fields (page 6 of 10)

Field	Description
Data Integrity	The validity and consistency of data contained in the application. For example, are all dates entered in a mm/dd/yy format and does each date include all attributes? • 0 - Data errors and inconsistencies permeate the system • 1 - Many data errors enter the system • 2 - More than average data errors • 3 - Few data errors enter the system • 4 - Seldom data errors enter the system • 5 - edits and validations ensure consistent data values throughout
Data Redundancy	The profusion of the same data in multiple data sources distributed across the enterprise. • 0 - Highly redundant with other data sources • 1 - Many redundant elements • 2 - Some redundancy • 3 - Few redundant elements • 4 - Minimal redundancy • 5 - No redundancy with other data sources
Vendor Financial Health	The financial soundness of the vendor. • 0 - Bankrupt • 1 - Questionable • 2 - Below average • 3 - Above average • 4 - Strong • 5 - Rock solid

Table A-8. Application Rating fields (page 7 of 10)

Field	Description
Vendor Competition	The maturity of the competitive landscape and the availability of alternate vendors. • 0 - No competitors • 1 - Emerging competitors • 2 - Some competition • 3 - Growing competition • 4 - Alternatives widely available • 5 - Commodity
Vendor Product Plans	The maturity of the application and if the enterprise affects the design process. • 0 - Off maintenance • 1 - Maintenance only • 2 - Occasionally updating • 3 - Actively updating • 4 - Plans aligned to needs • 5 - Design partner
Business Criticality	The importance of the application to the success and survivability of the business. • 0 - Least critical • 1 - Slightly critical • 2 - Less than average • 3 - More than average • 4 - Critical • 5 - Highly critical
Revenue Impact	The effect of the application, either directly or indirectly, on revenue. • 0 - None • 1 - Little • 2 - Some impact • 3 - More impact • 4 - Great impact • 5 - Highest impact

Table A-8. Application Rating fields (page 8 of 10)

Field	Description
Competitive Advantage	The gain this application provides compared to other vendor's similar applications. • 0 - None • 1 - Little • 2 - Some advantage • 3 - More advantage • 4 - Great advantage • 5 - Dominance
Customer Visibility	The accessibility of the application to the customer. • 0 - Internal facing • 1 - Some customer impact • 2 - Some customer interaction • 3 - Customer facing • 4 - Primary customer channel • 5 - Global customer dependence
Expense Reduction	The decrease in costs when the application is used. • 0 - No impact on expense • 1 - Little impact on expense • 2 - Some impact on expense • 3 - More impact on expense • 4 - Expense containment • 5 - Major expense reduction
Manual Workarounds Available	The availability of manual processes to accomplish the same business function. • 0 - No • 1 - Few features • 2 - Some features • 3 - Many features • 4 - Yes • 5 - Yes and tested

Table A-8. Application Rating fields (page 9 of 10)

Field	Description
Security Risk	The liability of the application in regards to access and security. • 0 - Conforms to security best practices • 1 - Implements standard security practices • 2 - Provides some degree of access and data security • 3 - Provides some degree of access or data security • 4 - Provides little security protections • 5 - No security protections
Architecture Risk	The liability of the application in regards to the architecture defined by the organization. • 0 - Conforms to architecture best practices • 1 - Adheres to enterprise standard practices • 2 - Partially adheres to enterprise standard practices • 3 - Minimally adheres to enterprise standard practices • 4 - Does not adhere to enterprise standard practices • 5 - No architecture standards defined
Technology Risk	The liability of the application based on the technology it utilizes. • 0 - Runs on modern, proven, standard technology • 1 - Runs on standard technology • 2 - Runs primarily on modern, proven technology • 3 - Utilizes some non-standard technology • 4 - Utilizes some obsolete, non-standard technology • 5 - Runs entirely on obsolete technology

Table A-8. Application Rating fields (page 10 of 10)

Field	Description
Skills Risk	The liability of the application in regards to the availability of users with the ability to run the application. • 0 - Skills exist in-house • 1 - Skills are readily available in the market • 2 - Skills are specialized but available in-house • 3 - Specialized skills are somewhat available in the market • 4 - Specialized skills are in limited supply • 5 - Highly specialized skills are scarcely available in the market
Compliance Risk	The liability of the application based on regulatory requirements and compliance validation. • 0 - No requirements or independently audited compliance with all requirements • 1 - Conforms to all compliance requirements • 2 - Non-compliance identified and correction plans in place • 3 - Non-compliance identified but no correction plans in place • 4 - Unknown compliance requirements • 5 -Non-compliance identified that cannot be corrected
Business Continuity Risk	The liability of the application based on data backups and the availability of a business continuity plan (BCP). The liability may be affected by the criticality of the application to the enterprise. • 0 - BCP defined, tested, and operational • 1 - BCP defined • 2 - Data securely backed up and manual workarounds in place • 3 - Data backed up regularly • 4 - Data backed up irregularly • 5 - No BCP or manual workarounds defined

Score

In the Score section, view the computed scores and enter an adjustment factor for the total score.

Users assigned one or more of the following roles can view the data in this section: Business Owner, Technical Owner, Respondent (when more information is requested), or SME (subject matter expert). Users assigned one or more of the following roles can edit the data in this section: Business Owner, Technical Owner, or Respondent (when more information is requested).

Figure A-9. Application Score section

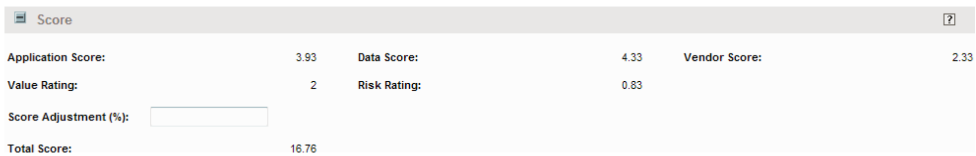


Table A-9. Application Score fields (page 1 of 3)

Field	Description
Application Score	Read-only. The rating of the application, from zero to five (zero being the worst and five being the best). By default, the application score is calculated from non-empty individual ratings defined in the Application Rating Section. The formula for the application score may be customized. Application Score = [(5 – Relative Cost) + (5 – Relative Size) + Operational Stability + Maintainability + (5 – Change Frequency) + Functional Completeness + Flexibility + (5 – Interface Complexity) + Documentation + Performance + Availability + Meets SLAs + Size of User Base] / (number of non-empty ratings)

Table A-9. Application Score fields (page 2 of 3)

Field	Description
Data Score	Read-only. The rating of the data provided by the application, from zero to five (zero being the worst and five being the best). By default, the data score is the average of non-empty individual ratings in the Data Rating Section. The formula for data score may be customized. Data Score = (Data Consistency + Data Integrity + Data Redundancy) / (number of non-empty ratings)
Vendor Score	Read-only. The rating of the vendor of the application, from zero to five (zero being the worst and five being the best). By default, the vendor score is the average of non-empty individual ratings in the Vendor Rating Section. The formula for vendor score may be customized. Vendor Score = (Vendor Financial Health + Vendor Competition + Vendor Product Plans) / (number of non-empty ratings)
Value Rating	Read-only. The qualitative measure of the business value of the application, from zero to five (zero being the worst and five being the best). By default, the value rating is the average of non-empty individual ratings in the Value Rating Section. The formula for value rating may be customized. Value Rating = (Business Criticality + Revenue Impact + Competitive Advantage + Customer Visibility + Expense Reduction + Manual Workarounds Available) / (number of non-empty ratings)
Risk Rating	Read-only. The qualitative measure of the technical debt of the application, from zero to five (zero being the worst and five being the best). The risk rating is calculated from values defined in the Risk Rating Section of the Rating section. By default, the risk rating is the average of non-empty individual ratings in the Risk Rating Section. The formula for risk rating may be customized. Risk Rating = (Security Risk + Architecture Risk + Technology Risk + Skills Risk + Compliance Risk + Business Continuity Risk) / (number of non-empty ratings)

Table A-9. Application Score fields (page 3 of 3)

Field	Description
Score Adjustment (%)	Percentage adjustment (positive or negative) made to the total score.
Total Score	Read-only. The sum of all ratings and scores with the Score Adjustment applied. Total Score = [Application Score + Data Score + Vendor Score + Value Rating + (5 – Risk Rating)] * [1 + (Score Adjustment / 100)]

B PPM Dashboard Pages and Portlets

PPM Dashboard Pages and Portlets Overview

HP Application Portfolio Management (HP APM) provides several shared PPM Dashboard pages and portlets for HP APM users. It also provides portlets that HP APM users can add to their private PPM Dashboard pages and configure.

- *Shared PPM Dashboard Pages and Portlets*. PPM Dashboard pages and portlets provided for users. You cannot edit shared PPM Dashboard pages. You can configure shared portlets only if you first copy them to a private PPM Dashboard page.
- *Configurable Portlets*. Portlets you can add to private PPM Dashboard pages and personalize.

➤ The My Applications and My Workstreams portlets are both shared and configurable portlets. The version that is displayed on a shared PPM Dashboard page contains different information than the default version you can add to a private PPM Dashboard page.

The PPM Dashboard pages and portlets available to you might be different from the PPM Dashboard pages and portlets described in this appendix. This could be because of your configuration or the roles that you are assigned. Additionally, it could be because the HP APM administrator chose to remove or add PPM Dashboard pages and portlets to your organization's implementation of HP APM. Any PPM Dashboard pages and portlets added by your HP APM administrator are not documented in this guide.

Because HP APM is a part of HP Project and Portfolio Management Center (PPM Center), PPM Dashboard pages and portlets unrelated to HP APM might also be available to you. This guide addresses only the HP APM pages and portlets.

This appendix provides descriptions and screenshots of the shared PPM Dashboard pages and the portlets they contain. It also provides descriptions and screenshots of the portlets you can add to your private PPM Dashboard pages.

For information about managing and using PPM Dashboards and portlets, see Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15, and the *Getting Started* guide.

Shared PPM Dashboard Pages and Portlets

The shared PPM Dashboard pages provided for HP APM users are preconfigured pages that contain entity-related portlets. The portlets on the shared PPM Dashboard pages are predefined versions of the portlets that are available for you to add to a personalized PPM Dashboard page. You cannot edit the shared PPM Dashboard pages but you can configure the shared portlets if you first copy them to a private PPM Dashboard page.

The portlets on the shared PPM Dashboard pages are also known as HP-supplied portlets.

The following shared PPM Dashboard pages are typically provided for HP APM users:

- *Front Page*
- *Applications Page*

The shared PPM Dashboard pages and portlets are described in the following sections. For more information about shared portlets, see the online help and Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15

Front Page

The Front Page PPM Dashboard page displays four shared portlets. These portlets provide information that you might want to track regularly about the applications you own, workstreams for which you are a resource, applications requiring your input, and surveys requiring your response.

Figure B-1. Example Front Page with portlets

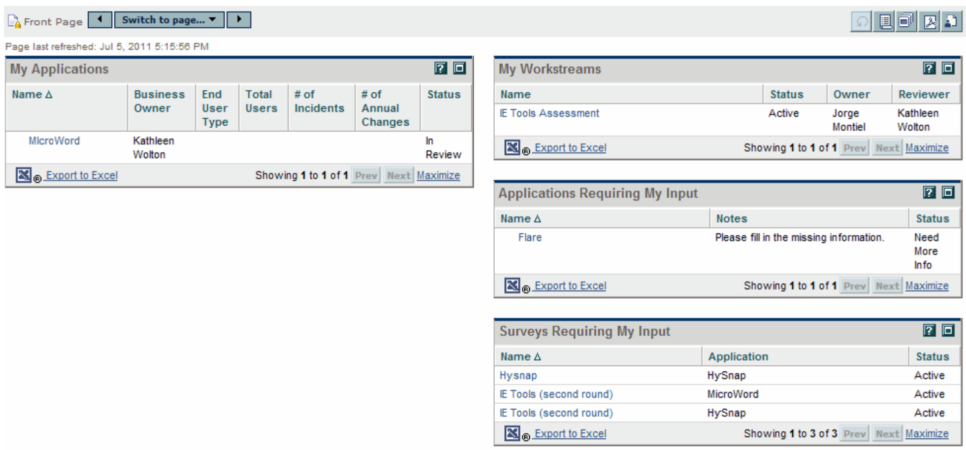


Table B-1. Front Page portlets (page 1 of 2)

Portlet Name	Description
My Applications	This portlet displays the list of applications you created or own. Use this portlet to track basic information about applications you created or own. The following columns are displayed: Name, Business Owner, End User Type, Total Users, # of Incidents, # of Annual Changes, and Status. By default, applications are listed in alphabetical order by name.
My Workstreams	This portlet displays a list of all workstreams you own, review, or belong to as a resource. Use this portlet to view the workstreams that you manage. The following columns are displayed: Name, Status, Owner, and Reviewer.

Table B-1. Front Page portlets (page 2 of 2)

Portlet Name	Description
Applications Requiring My Input	This portlet displays a list of applications for which you are a delegate (respondent) and that need your input. It includes any special instructions for you to follow in the Notes column. Use this portlet to view and edit applications for which you need to supply information. The following columns are displayed: Name, Notes, and Status. By default, applications are listed alphabetically by name.
Surveys Requiring My Input	This portlet displays all active survey requests made to you. Use this portlet to view and access the surveys you need to complete. The following columns are displayed: Name, Application, and Status. By default, surveys are listed alphabetically by name.

Applications Page

The Applications PPM Dashboard page displays a single portlet, the Application Hot List. This portlet provides information about all the applications in your organization's portfolio.

Figure B-2. Example Applications page with Application Hot List portlet

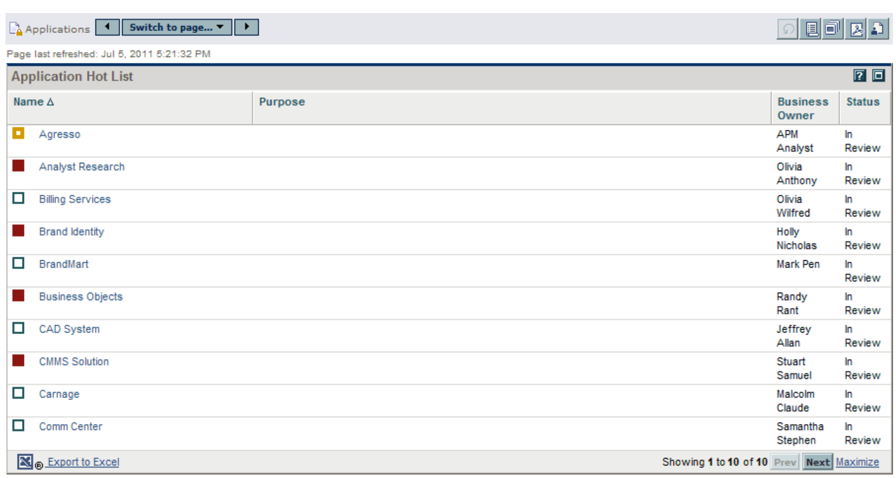


Table B-2. Applications page portlets

Portlet Name	Description
Application Hot List	This portlet displays a list of all the applications in your organization's portfolio. Use this portlet to track basic information about the applications. The following columns are displayed: Name, Purpose, Business Owner, and Status. By default, applications are listed alphabetically by name.

Configurable Portlets

The following portlets display information about your application portfolio. After you add these portlets to your private PPM Dashboard pages, you can configure and personalize them:

- *List of Applications (User)*. Lists basic information about applications.
- *My Applications*. Lists the applications that you created or own.
- *My Surveys*. Lists the surveys to which you have been asked to respond.
- *My Workstreams*. Lists the workstreams you manage or of which you are a member.

➤ You can find these portlets in the **Application Portfolio** category when you add portlets to a private PPM Dashboard page.

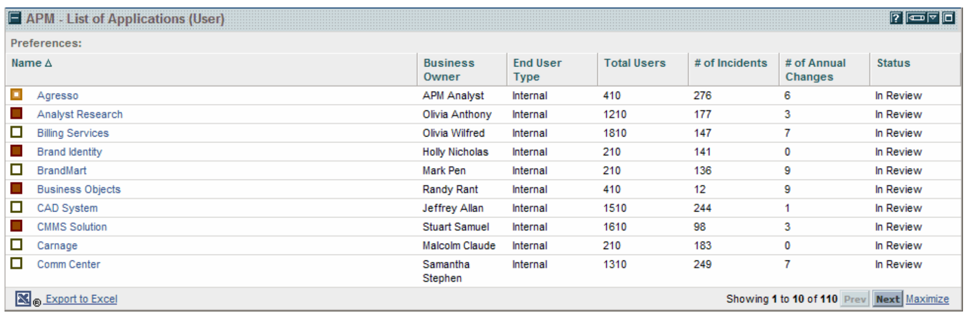
The configurable portlets are described in the following sections. For more information about portlets, see the online help and Chapter 2, *Managing the PPM Dashboard and Portlets,* on page 15.

List of Applications (User)

The List of Applications (User) portlet displays a list of all applications in your organization's portfolio. Use this portlet to view basic information about an application. Create a customized version of the portlet to track and assess data meaningful to you.

By default, this portlet displays the application name, the name of the business owner, end user type, total users, number of incidents, number of annual changes, and status. This information is listed alphabetically by application name.

Figure B-3. Example List of Applications (User) portlet



APM - List of Applications (User)

Preferences:

Name ∆	Business Owner	End User Type	Total Users	# of Incidents	# of Annual Changes	Status
Agresso	APM Analyst	Internal	410	276	6	In Review
Analyst Research	Olivia Anthony	Internal	1210	177	3	In Review
Billing Services	Olivia Wilfred	Internal	1810	147	7	In Review
Brand Identity	Holly Nicholas	Internal	210	141	0	In Review
BrandMart	Mark Pen	Internal	210	136	9	In Review
Business Objects	Randy Rant	Internal	410	12	9	In Review
CAD System	Jeffrey Allan	Internal	1510	244	1	In Review
CMMS Solution	Stuart Samuel	Internal	1610	98	3	In Review
Carnage	Malcolm Claude	Internal	210	183	0	In Review
Comm Center	Samantha Stephen	Internal	1310	249	7	In Review

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You can edit the preferences and display columns to filter the results that are displayed in the portlet.

Table B-3. List of Applications (User) portlet filters (page 1 of 3)

Field (*Required)	Description
Application	Select zero, one, or more applications to display the quality, health, value rating, and total cost of ownership. If no applications are specified, all applications for which data is available are displayed.
Contact	Select a person who is the primary contact regarding the infrastructure supporting the application. Only applications that have this person listed as its contact are displayed.
Business Owner	Select a person who has the primary business authority for the application. Only applications that have this person listed as its business owner are displayed.

Table B-3. List of Applications (User) portlet filters (page 2 of 3)

Field (*Required)	Description
Health	Select zero, one, or more color-coded indicators of the application's health to display. Only applications that have this health are displayed. If no health is specified, all applications for which data is available are displayed.
Status	Select a status of the applications to display. Only applications that have this status are displayed.
Process	Select a business process supported by the application. Only applications that support this business process are displayed. If no business process is specified, all applications for which data is available are displayed.
Is Orphan?	Select applications that do or do not support a business process. • No - Select applications that support a business process • Yes - Select applications that do not support a business process • Blank - Select all applications
Delegate	Select a person who is asked to supply additional information about the application. Only applications that have this person listed as its delegate are displayed.
Display preferences summary on portlet	Display the preferences you have selected at the top of the portlet.
Sort By	Select the column used to sort the data.
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	Default: 10 Specify the number of applications displayed in the normal portlet view. Type any integer greater than zero.
*Rows Displayed in Maximized View	Default: 50 Specify the number of applications displayed in a maximized portlet. Type any integer greater than zero.

Table B-3. List of Applications (User) portlet filters (page 3 of 3)

Field (*Required)	Description
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. See the online help for the portlet for a description of each column.
Displayed Columns	Select the names of the columns to display in the portlet and the order in which they are displayed.
Additional Columns Displayed in Maximized View	Select the names of the columns to display in a maximized portlet and the order in which they are displayed.

My Applications

The My Applications portlet displays a list of the applications you created or own. Use this portlet to track basic information about these applications. Create a customized version of the portlet to track and assess data meaningful to you.

By default, this portlet displays the application name, entity number (ID), name of the business owner, disposition, score, and status. This information is listed alphabetically by application name.

Figure B-4. Example My Applications portlet

You can edit the preferences and display columns to filter the results that are displayed in the portlet.

Table B-4. My Applications portlet filters (page 1 of 2)

Field (*Required)	Description
Application(s)	Select zero, one, or more applications that you own to display. If no applications are specified, all applications you own are displayed.
Health	Select zero, one, or more color-coded indicators of the application's health to display. Only applications that have this health are displayed. If no health is specified, all applications for which data is available are displayed.
Status	Select a status of the applications to display. Only applications that have this status are displayed.
Supported Process	Select a business process supported by the application. Only applications that support this business process are displayed. If no business process is specified, all applications for which data is available are displayed.
Is Orphan?	Select applications that do or do not support a business process. • No - Select applications that support a business process • Yes - Select applications that do not support a business process • Blank - Select all applications
Display preferences summary on portlet	Display the preferences you have selected at the top of the portlet.
Sort By	Select the column used to sort the data.
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	Default: 5 Specify the number of applications displayed in the normal portlet view. Type any integer greater than zero.
*Rows Displayed in Maximized View	Default: 50 Specify the number of applications displayed in a maximized portlet. Type any integer greater than zero.

Table B-4. My Applications portlet filters (page 2 of 2)

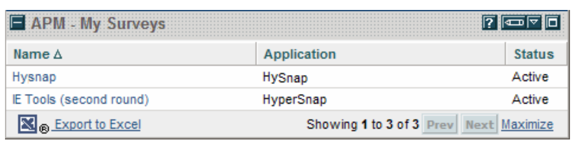
Field (*Required)	Description
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. See the online help for the portlet for a description of each column.
Displayed Columns	Select the names of the columns to display in the portlet and the order in which they are displayed.
Additional Columns Displayed in Maximized View	Select the names of the columns to display in a maximized portlet and the order in which they are displayed.

My Surveys

The My Surveys portlet displays all the active survey requests that ask for your participation. Use this portlet to view the survey requests you need to complete.

By default, this portlet displays the survey name, application name, and status. Survey requests are listed alphabetically by name.

Figure B-5. Example My Surveys portlet



You can edit the preferences and display columns to filter the results that are displayed in the portlet.

Table B-5. My Surveys portlet filters (page 1 of 2)

Field (*Required)	Description
Include Closed?	Include or do not include surveys that are not active. • Yes - Include surveys that are not active • No - Include active surveys only
Sort By	Select the column used to sort the data.

Table B-5. My Surveys portlet filters (page 2 of 2)

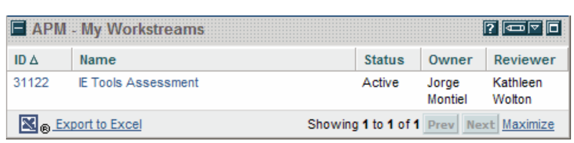
Field (*Required)	Description
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	Default: 5 Specify the number of surveys displayed in the normal portlet view. Type any integer greater than zero.
*Rows Displayed in Maximized View	Default: 50 Specify the number of surveys displayed in a maximized portlet. Type any integer greater than zero.
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. See the online help for the portlet for a description of each column.
Displayed Columns	Select the names of the columns to display in the portlet and the order in which they are displayed.
Additional Columns Displayed in Maximized View	Select the names of the columns to display in a maximized portlet and the order in which they are displayed.

My Workstreams

The My Workstreams portlet displays a list of all the workstreams you own, review, and are assigned as a resource for. Use this portlet to view the workstreams that you manage.

By default, this portlet displays the entity number (ID), workstream name, status, owner, and reviewer. Workstreams are listed numerically (lowest to highest) by ID.

Figure B-6. Example My Workstreams portlet



You can edit the preferences and display columns to filter the results that are displayed in the portlet.

Table B-6. My Workstreams portlet filters

Field (*Required)	Description
Include Closed?	Include or do not include workstreams that are completed. • Yes - Include workstreams that are closed • No - Do not include workstreams that are closed
Sort By	Select the column used to sort the data.
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	Default: 5 Specify the number of workstreams displayed in the normal portlet view. Type any integer greater than zero.
*Rows Displayed in Maximized View	Default: 50 Specify the number of workstreams displayed in a maximized portlet. Type any integer greater than zero.
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. Refer to the online help for the portlet for a description of each column.
Displayed Columns	Select the names of the columns to display in the portlet and the order in which they are displayed.
Additional Columns Displayed in Maximized View	Select the names of the columns to display in a maximized portlet and the order in which they are displayed.

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