Project and Portfolio Management Center

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Application Portfolio Management User's Guide

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Chapter 1: Introduction to Application Portfolio Management

Introduction to Application Portfolio Management

HPE PPM Application Portfolio Management (APM) enables your organization to assess and prioritize its current application portfolio and determine which applications need to be modernized. Organizations use APM as the first step towards application transformation as they:

- Document the size of their application portfolio and the applications that support their business processes.
- Compare and analyze application information such as health, effectiveness, ownership, cost of ownership, business value, and risk.
- Identify improvement opportunities and modernize their 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.

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

This guide is intended for APM users. It describes the tasks typically performed by users and the instructions for performing the tasks—or it refers the reader to the documents that provide the necessary information.

> **Note:** This guide describes the default interface for APM. Customizations made by the APM administrator to meet your organization's business needs and requirements are not documented in this guide.

APM Roles

The primary APM roles—user, analyst, and administrator—are described in this section.

> **Note:** Besides being one of the APM roles, the term "user" is also used generically in this guide to refer to APM users of any role.

- **User.** The most basic user of APM. Users perform tasks such as creating application entities, managing the applications they own, and responding to surveys and supplying information for applications when requested to do so by the analyst and other users (as a proxy). Authorized users can view and edit some or all of the financial summary for an application entity or transformation proposal. For more information about the APM user role, see the "The Role of the User" below.
- **Analyst.** The most active user of APM. The analyst performs many tasks, including collecting and analyzing data about the organization and its application portfolio. The analyst also conducts surveys, creates entities, imports and exports entity data using the PPM Data Migrator for Microsoft Excel (Data Migrator), creates portlets, and analyzes applications using application sets, portlets, reports, graphing, and entity groupings. The analyst can also typically perform all the duties of a user. For more information about the role of the analyst, see the *Application Portfolio Management Analyst's Guide*.
- **Administrator.** The most advanced user of APM. The administrator has all the abilities of an analyst and user but is typically involved with supporting the analyst in achieving the analyst's goals. The administrator installs, sets up, and maintains APM, defines users, customizes fields and validations for entities, and can create customized entities, data sources, portlet definitions, workflows, validations, report types, and security groups. For more information about the APM administrator, see the *Application Portfolio Management Administrator's Guide.*

The Role of the User

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

- Helping to build your organization's application portfolio by creating application entities. For instructions, see "Creating Application Entities" on page 19.
- Building an application portfolio. For instructions, see "Guidelines for Building the Application Portfolio" on the next page.
- Monitoring the portlets on your PPM Dashboard pages. Portlets display information of value to you as an APM user—such as data about applications that you own, applications in your organization's portfolio, surveys you have been asked to complete, and workstreams to which you are assigned. For information about PPM Dashboard pages and portlets, see "Managing the PPM Dashboard and Portlets" on page 13.
- Completing surveys about applications you own or use. For instructions, see "Completing Surveys" on page 40. The analyst uses this data to understand and determine the necessity and value of the applications in your organization's application portfolio.
- Providing information about application entities when you are requested to do so. For instructions, see "Responding to Requests for Application Information" on page 43.
- Viewing and editing some or all of the financial summary for an application entity or transformation proposal, if authorized to do so. For more information, see the *Financial Management User’s Guide.*

Additionally, if you are designated as a contact for an APM entity, you are able to perform tasks such as viewing or editing data in sections of an entity that are not typically available to an APM user. Contact roles—such as business owner, technical owner, IT contact, budget manager, benefits manager, and subject matter expert (SME)—are assigned in the Contacts section of an application entity. Other contact roles are assigned in the Summary, details, or Staffing sections of many of the entities. The respondent role is assigned when a user is requested to provide additional information for an entity.

> **Note:** You might already be able to view or edit data in an entity if, for example, you created the entity.

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

For information about the contact roles that can be assigned in APM entities, see "Contacts" on page 49 for information about the tasks you might be able to perform. If you are an application owner or survey respondent, see "Responding to Surveys and Information Requests" on page 40, for descriptions of tasks you might be asked to perform. For descriptions of other roles that can be assigned to a user, see the *Application Portfolio Management Analyst's Guide* and the *Application Portfolio Management Administrator's Guide.*

Guidelines for Building the Application Portfolio

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

Follow these guidelines to build or contribute to an application portfolio:

1. Ask the administrator to register the users who are to serve as points of reference for the entities that you create. These users could be business owners, technical owners, IT contacts, budget or 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 them to the application portfolio inventory.

   > **Tip:** You can create entities one at a time or you can ask an analyst to import multiple entities (of the same type) at the same time from a MIcrosoft Excel spreadsheet into APM using the PPM Data Migrator for Microsoft Excel (Data Migrator).

   Information that you collect about applications includes system information, names used, versions, and contact information. It should also includes details about the business and technical environments, budget and resources, service and support, usage and scale, and relationships with processes, organizations, and other applications.
3. To fill gaps in your knowledge about an application, you can use the "Need More Info" workflow step to invite another user to access an application entity and update the information about it.

APM Components

The standard user interface for APM is a collection of specialized Web pages in PPM Center with components that offer you a customized view into APM. You use these Web pages to perform the tasks that you are responsible for as a user—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.

> **Note:** If you have a pop-up blocker or download blocker active on your Web browser, you might have difficulties using the Web pages.

APM components available for users include the following:

- 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 APM entities of all types.

  For more information, see "Managing Application Entities" on page 16.
- PPM Dashboard pages and portlets that contain information of value to a user. For more information, see "Managing the PPM Dashboard and Portlets" on page 13, and "PPM Dashboard Pages and Portlets" on page 73.
- 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 *Application Portfolio Management Analyst's Guide* and the *Demand Management User's Guide.*

For descriptions of the components and features of the standard PPM Center interface, and instructions for changing your password, resetting the display of warning messages, and configuring other interface settings, see the PPM Center *Getting Started* guide.

Guidelines for Using the PPM Center Documentation

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

Note the following:

- This guide documents the default user interface for APM. Your APM administrator might have customized the APM fields, pages, and entities 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 APM.
- On some PPM Center and APM pages, you might see the 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 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 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 *PPM Center request* instructions in the PPM Center documents for performing the necessary task. 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, in the PPM Center *Getting Started* guide, the instructions for running a saved search tell you to select **Open > Demand Management > Saved Searches > Manage Saved Searches.** To run a saved search in 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 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 do not have access to all the menus and options described in the referenced PPM Center documents. Your view of PPM Center and APM is determined by the implementation of your PPM Center, your APM role, and the level of access to features and data you are given by the APM administrator.

Getting Help Online

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

Related Documents

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

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

For important information about this release of APM, see the APM for PPM *Release Notes*.

These documents are available from the HPE Software Product Manuals Web site at https://softwaresupport.hp.com.

Chapter 2: Managing the PPM Dashboard and Portlets

Overview

You can 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. The PPM Dashboard, PPM Dashboard pages, and portlets are described in the following sections:

- "PPM Dashboard and PPM Dashboard Pages" below
- "Portlets" on the next page

PPM Dashboard and PPM Dashboard Pages

The PPM Dashboard, located on the menu bar, provides the core of the standard user interface. It is a real-time Web page view into your application portfolio. By viewing pages on the PPM Dashboard, you can obtain accurate, up-to-the-minute status information about your applications and deliverables.

PPM Dashboard pages, accessed from the PPM Dashboard, organize application data. You can choose to devote one PPM Dashboard page to application data and designate another for information about surveys you have been asked to complete. How you organize your data is entirely up to you.

Two types of PPM Dashboard pages are available for users in HPE PPM Application Portfolio Management (APM):

- **Shared PPM Dashboard pages.** Shared PPM Dashboard pages are preconfigured PPM Dashboard pages provided by APM or configured by the APM administrator. They are made available to one or many users. You cannot edit a shared PPM Dashboard page or the portlets it contains.

  APM supplies two shared PPM Dashboard pages for users: Front Page and Applications. These pages contain portlets that provide the type of information that is typically used by an analyst.

> **Tip:** Shared PPM Dashboard pages are also known as HPE-supplied PPM Dashboard pages.

- **Private PPM Dashboard pages.** You create and configure your private PPM Dashboard pages. You can add configurable portlets to a private page, move the pages up or down in the list of pages, and delete them. You can also configure the information displayed in shared portlets that you add to private pages.

The default PPM Dashboard page is the first PPM Dashboard page you see when you log on to APM. For users who have personalized their PPM Dashboard, it is the first private page on the list; for new users, it is the first shared page on the list.

For descriptions of the shared and private PPM Dashboard pages and portlets provided for users and for descriptions of the configurable portlets that you can add to a private PPM Dashboard page, see "PPM Dashboard Pages and Portlets" on page 73.

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 PPM Center*Getting Started* guide.

Portlets

Portlets are displayed on PPM Dashboard pages. They display real-time information relevant to your role as an APM user.

Two types of portlets are available in APM: shared and configurable.

- **Shared portlets.** Shared portlets are preconfigured portlets provided by APM or configured by the APM analyst or administrator. They are predefined versions of the configurable portlets. Shared portlets are displayed on the shared PPM Dashboard pages. You can edit shared portlets only if you first add them to a private PPM Dashboard page.

  The shared portlets for users contain information related to the applications they own, workstreams for which they are a resource, applications requiring their input, surveys requiring their response, and the applications in the organization's portolio.

  > **Note:** Shared portlets are also known as HPE-supplied portlets.

- **Configurable portlets.** APM provides several configurable portlets that you can add to your private PPM Dashboard pages and personalize. Configurable portlets are highly customizable—by setting filters, you can configure the data that is displayed.

The configurable portlets for users contain information related to the applications they own, workstreams for which they are a resource, applications requiring their input, surveys requiring their response, and the applications in the organization's portolio.

You can drill down on the data displayed in many of the shared and configurable portlets to view additional details.

For descriptions of the shared and configurable portlets provided for a user, see the online Help and "PPM Dashboard Pages and Portlets" on page 73.

For instructions for personalizing the configurable portlets, see the PPM Center*Getting Started* guide.

> **Tip:** 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 PPM Center*Getting Started* guide.

Chapter 3: Managing Application Entities

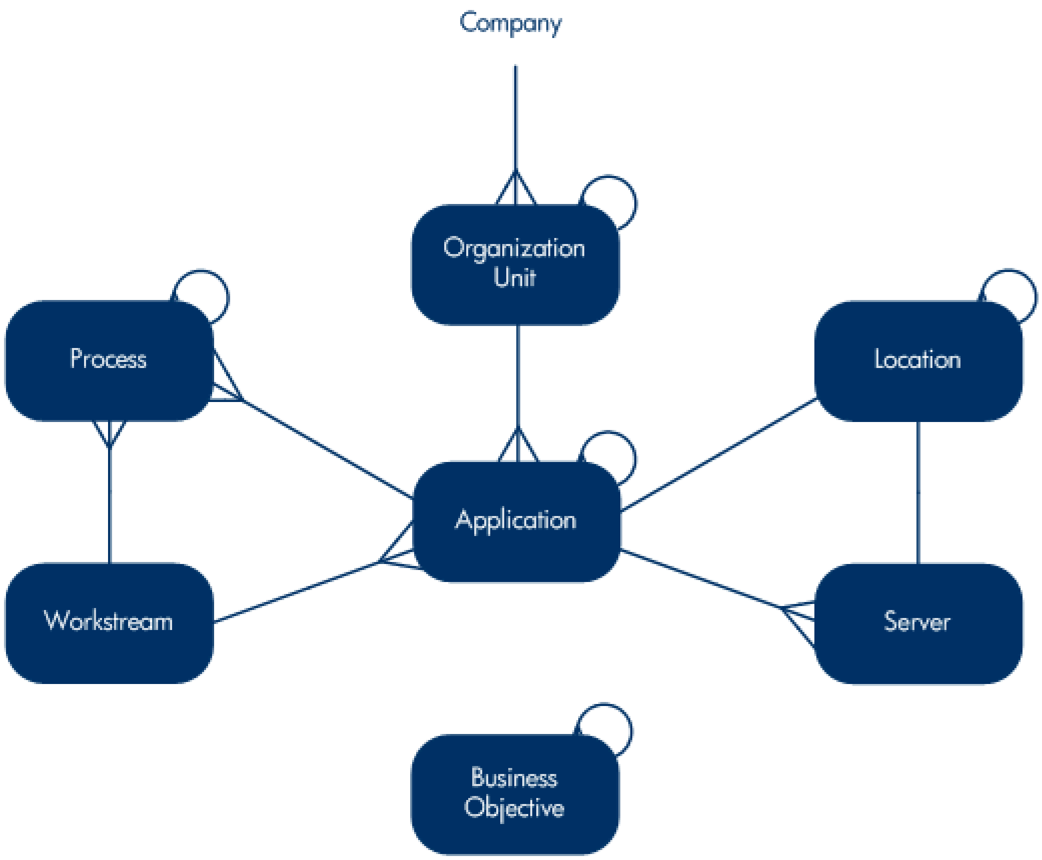
Application Entity Overview

In Application Portfolio Management (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 APM entity is a type of 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. Entity relationships" on the next page shows the relationships that can exist between entities in an APM user's application portfolio.

Figure 3-1. Entity relationships



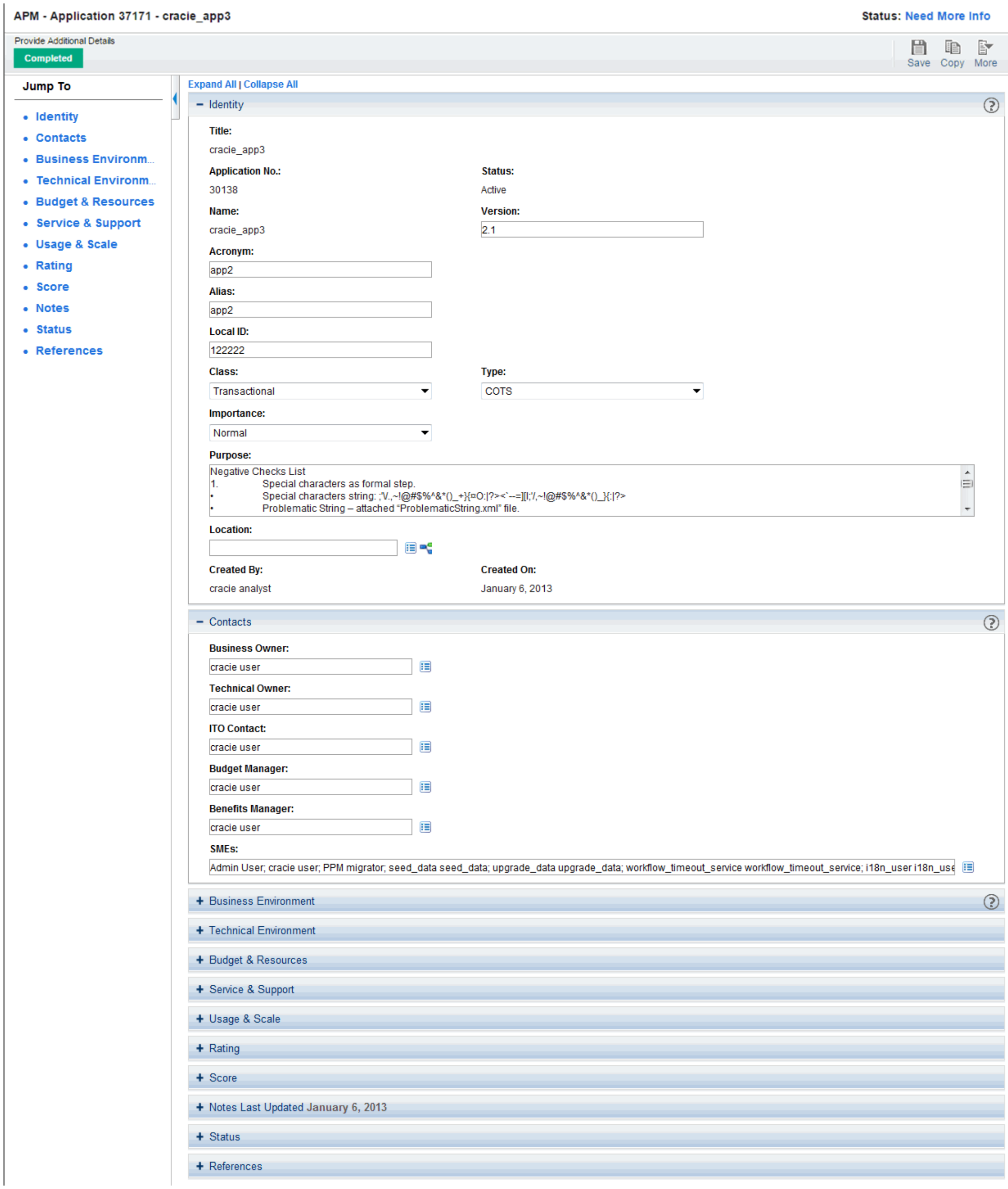
Application Entity Detail Page

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. Application entity detail page with several expanded sections" on the next page shows an application entity detail page and its main sections with the Identity and Contacts 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 *Demand Management User’s Guide.*

For detailed descriptions of the sections and fields unique to the detail page for an application entity, see "Application Entities" on page 45. If your organization's implementation of APM provides you with access to additional entities (such as workstreams or processes) or fields, see the *Application Portfolio Management Analyst's Guide* for descriptions.

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



Managing Entities

Because an 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" below
- "Opening Entities" on the next page
- "Searching Entities" on the next page
- "Editing Entities" on page 21

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

For additional information about entities, see the *Application Portfolio Management User's Guide*. For guidelines for using the instructions in the PPM Center documentation for performing APM tasks, see "Guidelines for Using the PPM Center Documentation" on page 10.

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.

> **Note:** Before you create an application entity, you should understand the relationships that the 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 APM analyst can create entities by importing them into APM using the PPM Data Migrator for Microsoft Excel (Data Migrator). For instructions, see the *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 *Demand Management User’s Guide*.

For descriptions of the fields that could be available for an application entity, see "Application Entities" on page 45 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" below and the *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.

> **Tip:** 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 *Demand Management User’s Guide.* For information about using a Request Browser search to create entity groups, see the example in the *Application Portfolio Management Analyst's Guide* and the instructions in the *Demand Management User’s Guide.*

> **Tip:** 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 *Demand Management User’s Guide*.

If two users edit the same entity at the same time and both click **Save,** APM attempts to save the changes made by both users. If a change cannot be saved, 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 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 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 20 and the *Demand Management User's Guide*.
- **Portlets.** Portlets provide you with real-time views into your 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 14 and "PPM Dashboard Pages and Portlets" on page 73.
- **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 *Demand Management User's Guide*.

Chapter 4: Managing Roadmap

Introduction to APM Roadmap

APM for PPM 9.22 introduced a new entity type Roadmap which defines the lifecycle statuses (roadmap phases) and milestones. You can create a roadmap for any other existing request. In APM for PPM 9.31, the use of roadmap is so enhanced that you can create and visualize Roadmaps in different levels.

To understand the enhanced use of roadmaps, you should first understand the following terms used in this document:

- **Roadmap/Roadmap Entity**

  A roadmap or roadmap entity is a roadmap for an individual application/service, or a group of applications/services, including lifecycle statuses (roadmap phases) and milestones. You can create a roadmap entity for any other existing request.

- **Roadmap Type**

  The request types able to have roadmaps attached in the requests are roadmap types. Portfolio is a default roadmap type. Customized roadmap types can be created by the APM administrator to meet your organization's business requirements. For example, you can set the request type APM - Application as the roadmap type.

- **Roadmap Hierarchy/Roadmap Chart**

  Roadmap hierarchy or roadmap chart is a tree-structured chart that can be expanded or collapsed to either present a single roadmap or roadmap hierarchy which includes the parent roadmap with child roadmaps underlying.

To create and visualize roadmaps at different levels means:

- In the request level
  - As an APM administrator, you can set a request type as the roadmap type. Requests of the roadmap type have a new section **Roadmap** added on the request detail page.
  - In the request detail page, you can enter child entities information in the table component field your administrator created.
  - The system fetches the child entities information from the table component field to generate the roadmap hierarchy in the **Roadmap** section.
- In the portfolio level
  - The portfolio manager can add assets in the **Proposals/Projects/Assets** tab of the Portfolio page.
  - The system fetches the assets of the roadmap type from the **Proposals/Projects/Assets** tab to generate a roadmap hierarchy in the **Roadmap** tab.
- In the portlet level

  An OOTB portlet Roadmap is introduced to the Application Portfolio category. With this portlet available, you can view the roadmap hierarchy on the Dashboard page.

Creating Roadmap for a Request

To create a Roadmap for a request,

1. From the menu bar, select **Open > Application Portfolio > Create Entities**.
2. Select **Roadmap** in the **Entities** section.

   The Create New APM - Roadmap page opens.

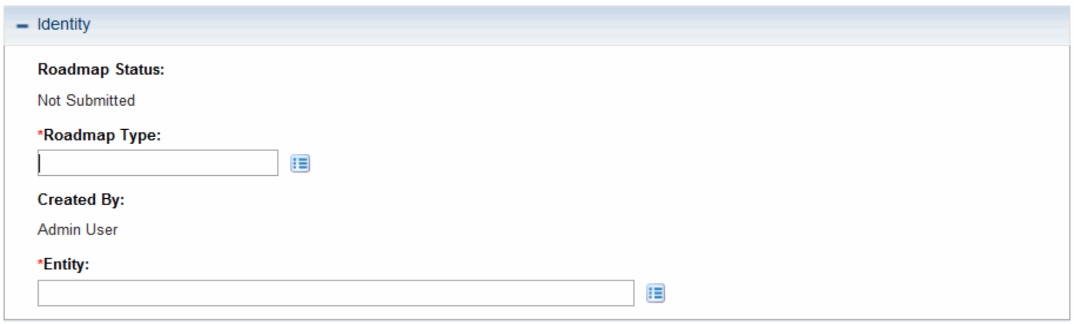
   > **Note:** For more ways to create a new entity, see the *Application Portfolio Management User’s Guide*.
   >
   > If your administrator has customized the request type APM - Roadmap, you cannot create a roadmap by copying an existing roadmap.
3. Enter information in the following sections:

- "Identity" below
- "Phases" on the next page
- "Milestones" on the next page

Identity

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

> **Note:** The Identity section is a subsection of the header section.



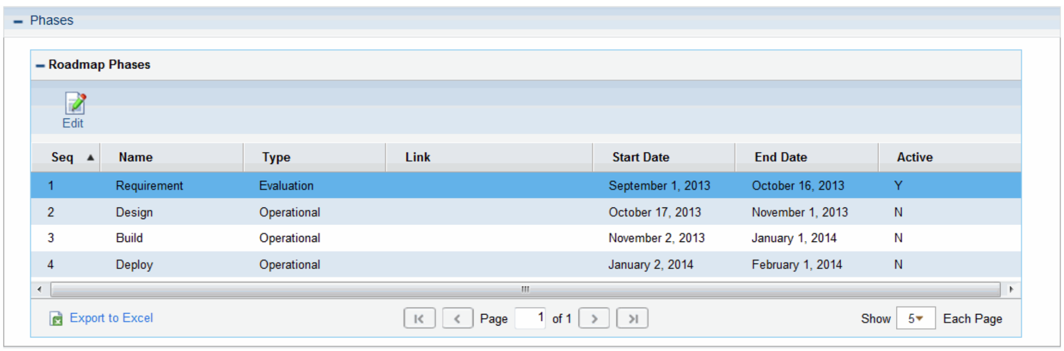
The table below describes the Identity fields.

Field (*Required)	Description
Roadmap Status	Read-only. Available roadmap statuses include: ◦ **New** - The roadmap is created but not submitted. ◦ **Draft** - The roadmap is submitted but not finalized. ◦ **Proposed** - The roadmap is finalized but not activated. ◦ **Active** - The roadmap is activated but not archived. ◦ **Cancelled** - The roadmap is cancelled. ◦ **Archived** - The roadmap is archived. The roadmap status changes as you go through different steps of the roadmap workflow.
Roadmap Type*	Available roadmap types include: ◦ Portfolio Portfolio is the only default roadmap type. Your administrator can set other request types as roadmap types according to your business needs. For more information, see the section "Setting Request Type as Roadmap Type" in *Application Portfolio Management Administrator's Guide*.
Created By	Read-only. The full name of the user who created the roadmap

Field (*Required)	Description
Entity*	The entity for which the roadmap is created **Note**: If an entity has a roadmap that is in Active status, you are not able to create another roadmap for this entity.

Phases

In the Phases section, enter the information of the phases the roadmap would go through.

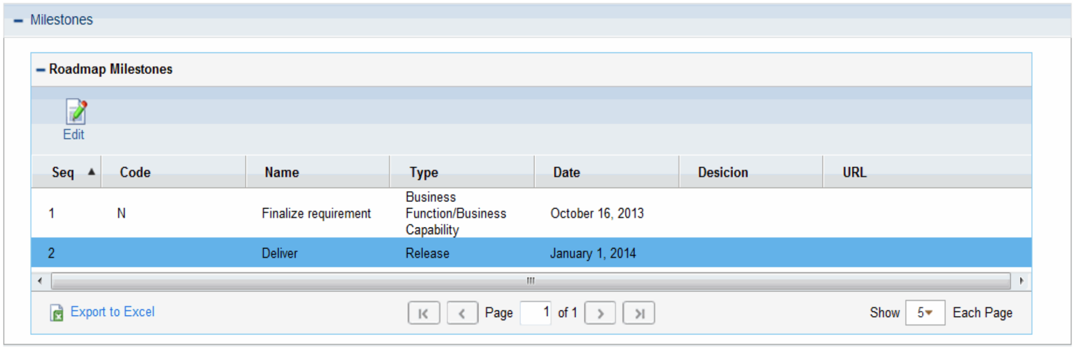


The table below describes the Roadmap Phases fields.

Field (*Required)	Description
Seq	Sequence of the roadmap phase
Name	Name of the roadmap phase
Type	Type of the roadmap phase. Available values include: ◦ Evaluation ◦ Planned ◦ Operational ◦ Archived ◦ Planned Decommissioned
Link	URL or any other kind of link of the roadmap phase
Start Date	Start date of the roadmap phase
End Date	End date of the roadmap phase
Active	Indicates whether or not the roadmap phase is active

Milestones

In the Milestones section, enter the information of the milestones you set for the roadmap.



The table below describes the Roadmap Milestone fields.

Field (*Required)	Description
Seq	Sequence of the roadmap milestone
Code	Code of the roadmap milestone
Name	Name of the roadmap milestone
Type	Type of the roadmap milestone. Available values include: ◦ Major Decision Point ◦ Minor Decision Point ◦ Release ◦ De-Investment ◦ Business Function/Business Capability ◦ Technology Capability
Date	Date of the roadmap milestone
Decision	Decision that has been made in this milestone
URL	URL of the milestone information

4. Complete other fields as necessary.
5. Click **Submit**.

Editing Roadmap for a Request

- "Edit Roadmap Phases" on the next page
- "Edit Roadmap Milestones" on the next page

> **Caution:** If you have customized the request type APM - Roadmap, you can not edit phases or

milestones information for a roadmap.

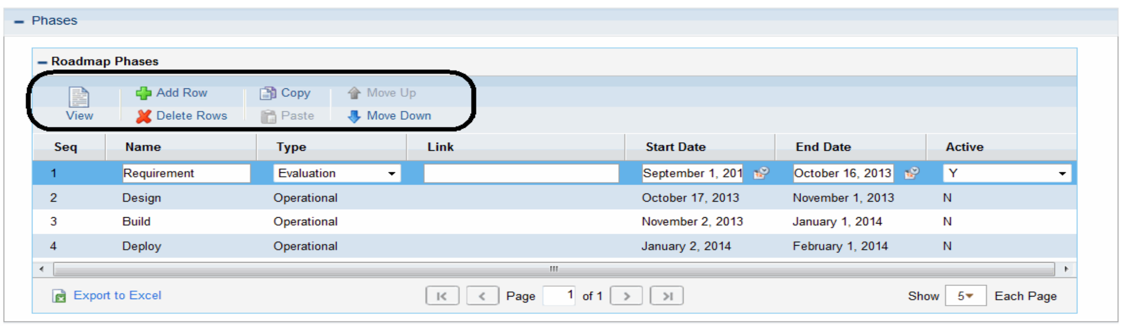
HPE recommends that you do not customize the OOTB request type APM - Roadmap.

Edit Roadmap Phases

To edit roadmap phases,

1. Open the roadmap you want to edit.
2. Click **Edit** in the Phases section.

   The Roadmap Phases section changes into the edit mode.



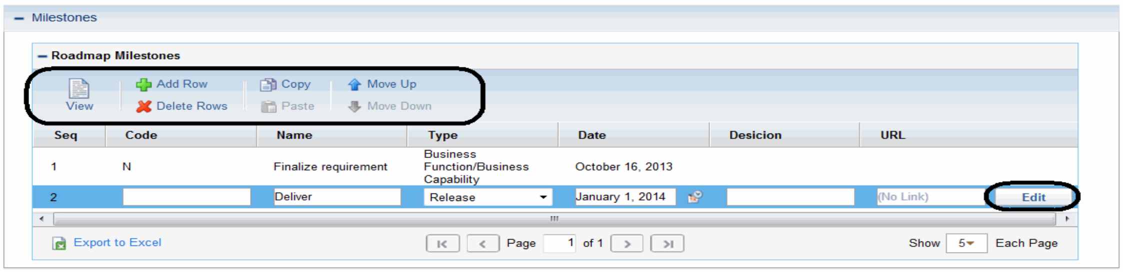
3. Under the edit mode, you can do the following to edit the phases:
   - Edit the existing phases information.
   - Add a new phase by clicking **Add Row**.
   - Delete a phase by clicking **Delete Row** after selecting the phase you want to delete.
   - Create a phase based on an existing phase by selecting the existing phase and then clicking **Copy** and **Paste**.
   - Adjust the phases sequence by clicking **Move Up** or **Move Down** after selecting the desired phase.

Edit Roadmap Milestones

To edit roadmap milestones,

1. Open the roadmap you want to edit.
2. Click **Edit** in the Milestones section.

   The Roadmap Milestones section changes into the edit mode.

3. Under the edit mode, you can do the followings to edit the milestones:
   - Edit the existing milestones information.
   - Add a new milestone by clicking **Add Row**.
   - Delete a milestone by clicking **Delete Row** after selecting the milestone you want to delete.
   - Create a milestone based on an existing milestone by selecting the existing milestone and then clicking **Copy** and **Paste**.
   - Adjust the milestones sequence by clicking **Move Up** or **Move Down** after selecting the desired milestone.

     Note: If you want to edit the URL field of a milestone, you may have to click **Edit** at the end of the milestone line to open the Link Properties window.

Building and Viewing Roadmap Hierarchy

- "Building and Viewing Roadmap Hierarchy in the Request Level" on the next page
- "Building and Viewing Roadmap Hierarchy in the Portfolio Level" on page 32
- "Building and Viewing Roadmap Hierarchy in Portlet Level" on page 34

Building and Viewing Roadmap Hierarchy in the Request Level

You can build roadmap hierarchy in the request level if your administrator has done the following:

- Set desired request types as roadmap types
- Defined roadmap hierarchy in the request level

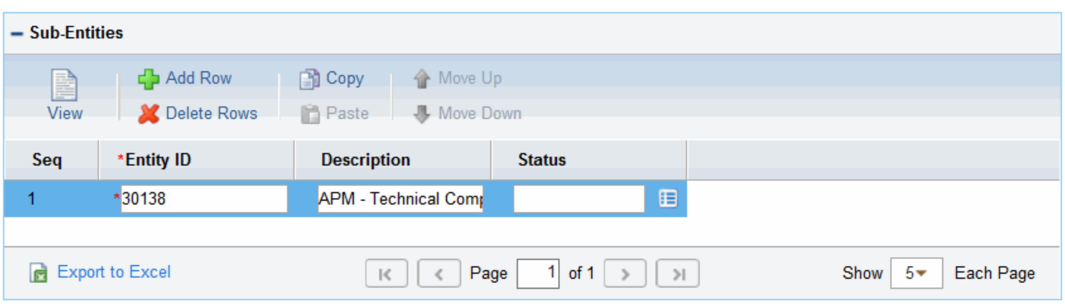
For information of the above configuration, see the *Application Portfolio Management Administrator's Guide*.

> **Note:** If your administrator used the database view APM_ROADMAP_ENTITY_HIERARCHY_V to define roadmap hierarchy, the system generates the roadmap hierarchy according to the view your administrator has defined. You do not need to build roadmap hierarchy by the following instructions.

To build and view roadmap hierarchy in the request level:

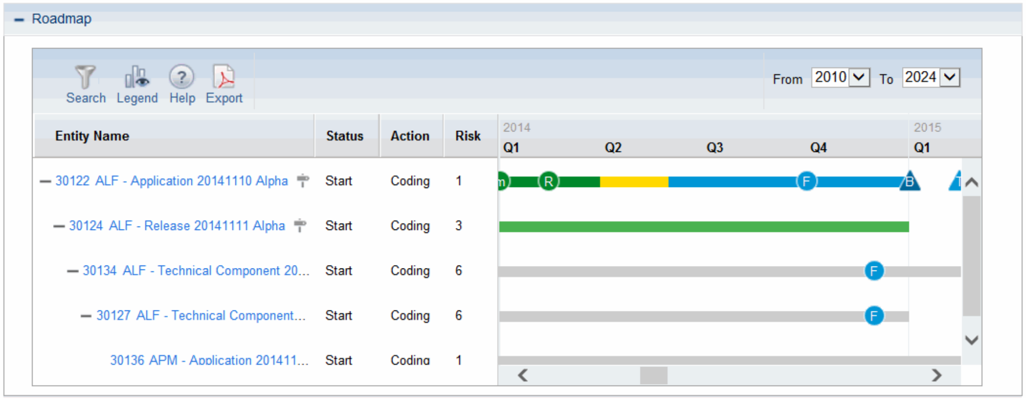
1. Open the request detail page where you want to build roadmap hierarchy.
2. In the table component field that your administrator created to store child entities, click **Edit**.

   This field switches to the edit mode. The following is only an example of the filed. The field name and its columns can be customized.

3. Click **Add Row** to enter the child entity information.
4. Repeat step 3 until you add all the child entities information.
5. The system fetches the child entities information from the table and generates the roadmap hierarchy in the **Roadmap** section on the entity detail page.

   The following is an example of the roadmap hierarchy.

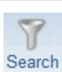
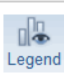
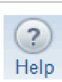
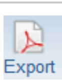


Note:

- The roadmap hierarchy can have 5 levels in depth at most, displaying no more than 1000 requests along with their roadmaps.
- A request may have more than one roadmap, however, only the active and last updated roadmap is displayed in the roadmap hierarchy. If the request does not have an active roadmap, the right side of the request line is empty.

  For information about creating a roadmap for a request, see "Creating Roadmap for a Request" on page 24

The following table describes the items in the roadmap hierarchy.

Item	Description
Toolbar Section	
	Click this to provide filters to search roadmaps. For more information, see "Using Filters in Roadmap Hierarchy" on page 37.
	Click this to open the Legend window that displays the meanings of the icons in the roadmap chart.
	Click this to open the Help text.
	Click this to export roadmap hierarchy to PDF.
From	The star year of the roadmap hierarchy you want to view
To	The end year pf the roadmap hierarchy you want to view
Left pane	

Entity Name	For a request, this field displays the value of the Description filed on the request detail page. **Note:** If the Description field is updated on the request detail page, the Entity Name value is *not* updated accordingly. Clicking the link opens the request detail page in another window.
<*Customized_ Columns*>	Customized columns if any. For information about adding customized coumns in roadmap hierarchy, see the *Application Portfolio Management Administrator's Guide*
	The icons displayed next to the entity names indicate that the entities have roadmaps attached.
+	Click this to expand entities and roadmaps.
−	Click this to collapse entities and roadmaps.
Right pane	The roadmap Gantt chart shows the phases and milestones of the roadmap for each entity. **Note:** • The maximum number of phases for a request's roadmap displayed in the Gantt chart is 100. • The maximum number of milestones for a request's roadmap displayed in the Gantt chart is 100.

Building and Viewing Roadmap Hierarchy in the Portfolio Level

You can build and view roadmap hierarchy in the portfolio level if your administrator has set the request type asset as the roadmap type.

To build and view roadmap hierarchy in the portfolio level:

1. Open the portfolio page where you want to build roadmap hierarchy.
2. Go to the **Proposals/Projects/Assets** tab.
3. Click **Actions** and then click **Add Proposals/Projects/Assets**.

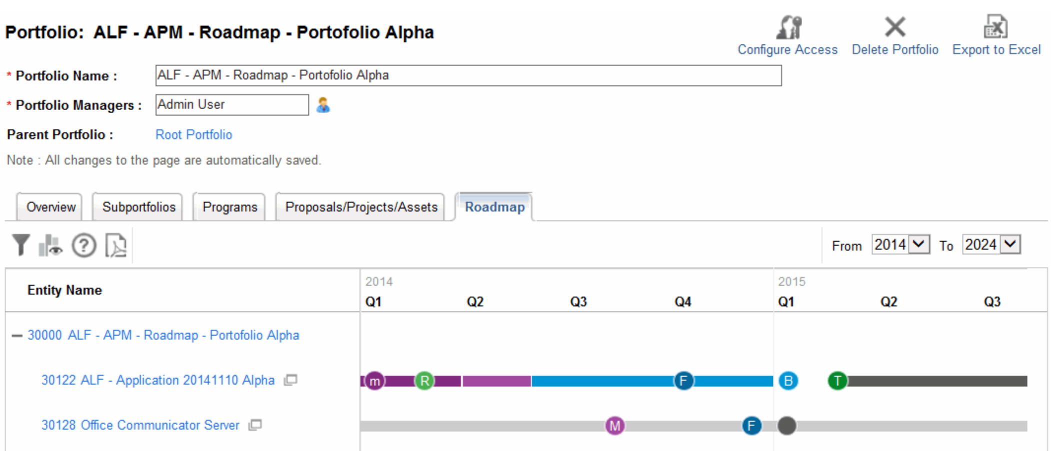
   The Add New Proposals/Projects/Assets window opens.

4. In the **Include Assets** field, select the entities you want to include in the roadmap hierarchy.
5. Click **Add**.

   Your selected entities are listed as assets in the **Proposals/Projects/Assets** tab.
6. Go to the **Roadmap** tab.

   The system fetches the assets of the roadmap type from the **Proposals/Projects/Assets** tab to generate the roadmap hierarchy.

   The assets not of roadmap type are not included in the roadmap hierarchy.

> **Note:**
>
> - The roadmap hierarchy can have 2 levels in depth at most, displaying no more than 1000 requests along with their roadmaps.
> - A request may have more than one roadmap, however, only the active and last updated roadmap is displayed in the roadmap hierarchy. If the request does not have an active roadmap, the right side of the request line is empty.
>
>   For information about creating a roadmap for a request, see "Creating Roadmap for a Request" on page 24

The following table describes the items in the roadmap hierarchy.

Item	Description
Toolbar Section	
	Click this to provide filters to search roadmaps. For more information, see "Using Filters in Roadmap Hierarchy" on page 37.

	Click this to open the Legend window that displays the meanings of the icons in the roadmap chart.
	Click this to open the Help text.
	Click this to export roadmap hierarchy to PDF.
From	The star year of the roadmap hierarchy you want to view
To	The end year pf the roadmap hierarchy you want to view
Left pane	
Entity Name	For a portfolio, this field displays the portfolio name. Clicking the link opens the request detail page in another window.
<*Customized_ Columns*>	Customized columns if any. For more information, see "Adding Customized Columns in Roadmap Hierarchy" on page 38.
	The icons displayed next to the entity names indicate that the entities have roadmaps attached.
	Click this to expand entities and roadmaps.
	Click this to collapse entities and roadmaps.
Right pane	The roadmap Gantt chart shows the phases and milestones of the roadmap for each entity. **Note:** • The maximum number of phases for an asset's roadmap displayed in the Gantt chart is 100. • The maximum number of milestones for an asset's roadmap displayed in the Gantt chart is 100.

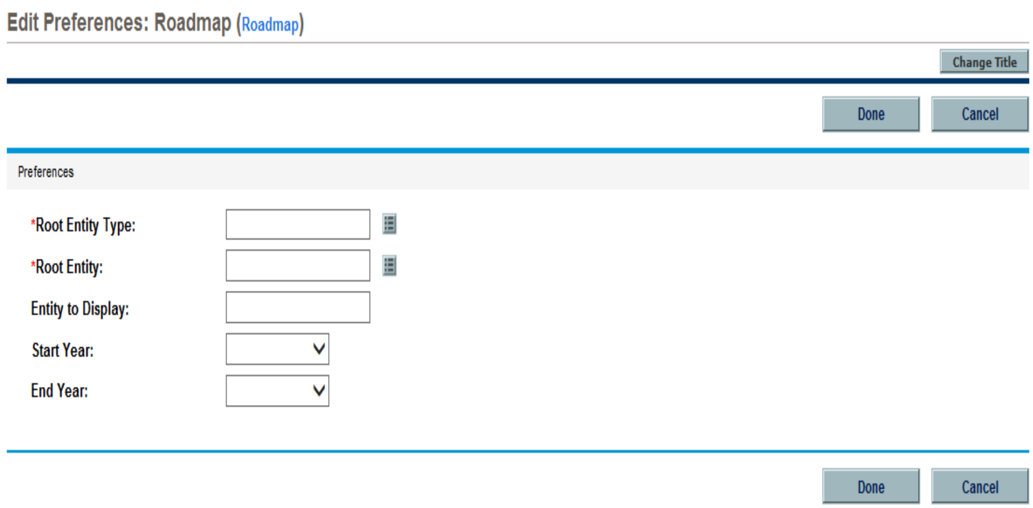
Building and Viewing Roadmap Hierarchy in Portlet Level

To build and view roadmap hierarchy in the portlet level:

1. Add the Roadmap portlet to a PPM Dashboard page.

   For information about adding portlets to PPM Dashboard pages, see the *Getting Started* guide.

2. Click the Roadmap portlet to open the Edit Preferences page.

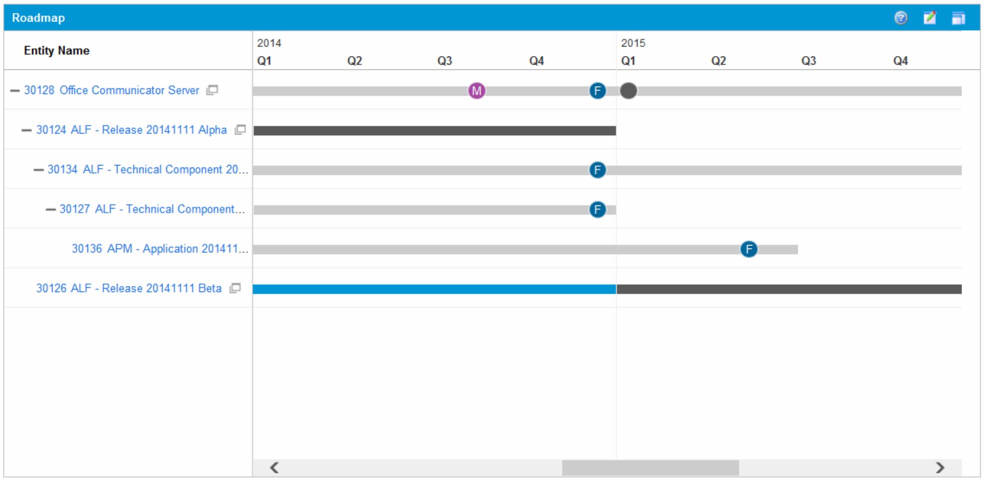


3. Configure the following fields in the Preferences section.

Field (*Required)	Description
*Root Entity Type	Entity type of the root entity in the roadmap hierarchy. Entity types in the auto-complete list are roadmap types. You can select only one value in this field.
*Root Entity	Root entity in the roadmap hierarchy. The values in this field depend on the value selected in the Root Entity Type filed.
Entity to Display	Name of the entity you want to be displayed in the roadmap hierarchy. If you provide a value for this field, only the entities whose level are higher than this entity are displayed while the sub-entities of this entity are not displayed in the roadmap hierarchy
Start Year	Starting year of the roadmap hierarchy
End Year	End year of the roadmap hierarchy

4. Click **Save**.

5. Go back to the Roadmap portlet.



Note:

- If the root entity is a portfolio, the Roadmap hierarchy can have 2 levels at most, displaying no more than 1000 requests along with their roadmaps.
- If the root entity is a request, the roadmap hierarchy can have 5 levels in depth at most, displaying no more than 1000 requests along with their roadmaps.

The following table describes the items in the roadmap hierarchy.

Item	Description
	Clicking this to open the help text for the Roadmap portlet, which also illustrate the meanings of the icons in the roadmap chart.
Left pane	
Entity Name	For a portfolio, this field displays the portfolio name. For a request, this field displays the value of the Description filed on the request detail page. **Note:** If the Description field is updated on the request detail page, the Entity Name value is *not* updated accordingly. Clicking the link opens the request detail page in another window.
<*Customized_ Columns*>	Customized columns if any. For more information, see "Adding Customized Columns in Roadmap Hierarchy" on page 38.
	The icons displayed next to the entity names indicate that the entities have roadmaps attached.

+	Click this to expand entities and roadmaps.
−	Click this to collapse entities and roadmaps.
Right pane	The roadmap Gantt chart shows the phases and milestones of the roadmap for each entity. **Note:** • The maximum number of phases for a request's roadmap displayed in the Gantt chart is 100. • The maximum number of milestones for a request's roadmap displayed in the Gantt chart is 100.

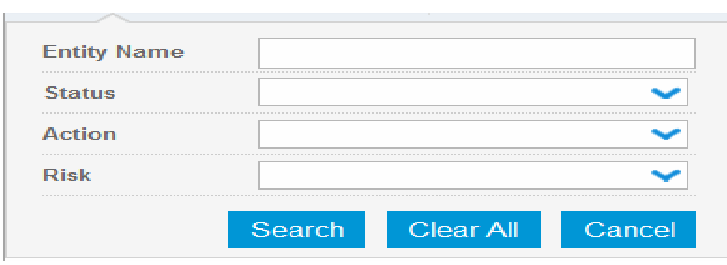
Using Filters in Roadmap Hierarchy

The filters available to be used for searching roadmaps depend on the columns available in the roadmap hierarchy.

To use filters in the roadmap hierarchy to search roadmaps:

1. Open the entity detail page if you want to do this in the request level, or open the portfolio page if you want to do this in the portfolio level.
2. Go to the **Roadmap** section on the request detail page, or the **Roadmap** tab on the portfolio page.
3. Click Search (or if you are in the **Roadmap** tab of the portfolio page).

   The filters dialog box opens. The following is an example.

4. Provide the filter criteria.

   > **Note:**
   >
   > ◦ If your administrator does not add customized columns in the roadmap hierarchy, only the filter **Entity Name** is available for use. The **Entity Name** filter does not allow multiple

values.

- You can use several filters at the same time.

5. Click **Search** to apply the filter criteria, click **Clear All** to wipe out the filter criteria, or click **Cancel** to close the filters dialog box.

   The entities along with their roadmaps are displayed. The filter criteria applied are listed in the toolbar section.

Adding Customized Columns in Roadmap Hierarchy

By default, only the Entity Name column is displayed in the roadmap hierarchy. If you want to see more columns or use these columns as filters to search roadmap in the roadmap hierarchy, your administrator should add customized columns.

To add customized columns in the roadmap hierarchy:

1. Set the parameter `ENABLE_ROADMAP_EXT_ATTR` to `true` in the `server.conf` file.

   By default, the value of this parameter is `false`.

2. Define the database view APM_ROADMAP_ENTITY_EXT_ATTR_V to add columns you want to be displayed in the roadmap hierarchy.

   For the definition of this view, see "APM_ROADMAP_ENTITY_EXT_ATTR_V" below

APM_ROADMAP_ENTITY_EXT_ATTR_V

This view stores all the columns displayed in the roadmap hierarchy.

Foreign Keys

Primary Key Table	Primary Key Column	Foreign Key Column
APM_ROADMAP_ENTITY_HIERARCHY_V	ENTITY_ID	ENTITY_ID
APM_ROADMAP_ENTITY_HIERARCHY_V	ENTITY_TYPE	ENTITY_TYPE

Column Descriptions

Column Name	Null?	Data Type	Description
ENTITY_ID	NOT NULL	VARCHAR	Identifier for entity. The value of this column should be either portfolio ID or request ID.
ENTITY_TYPE	NOT NULL	VARCHAR	Roadmap type of the entity. The value of this column should be either portfolio or request.
ATTR_NAME_A	NULLABLE	VARCHAR	Customized column
ATTR_NAME_B	NULLABLE	VARCHAR	Customized column
ATTR_NAME_C	NULLABLE	VARCHAR	Customized column

> **Note:**
>
> - HPE recommends that you add no more than 3 customized columns for the performance sake.
> - The column names in this table follow the rules as below when they are displayed in the roadmap hierarchy:
>   - Only the first letter of each word is capitalized in the roadmap hierarchy.
>   - The underline between words is switched into space.
>
>   For example, the column name STATUS_NAME is displayed as Status Name in the roadmap hierarchy.

Chapter 5: Responding to Surveys and Information Requests

Survey and Information Request Overview

As an Application Portfolio Management (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 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. Shared portlets on the Front Page PPM Dashboard page" on page 75 and "My Surveys" on page 81.
- 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 42.

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.

  > **Note:** You must be logged on to 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:

> **Tip:** 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" above.

   > **Note:** 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 59.
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 *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 the previous page.
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 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. Shared portlets on the Front Page PPM Dashboard page" on page 75.

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.

  > **Note:** 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 the previous page.

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.

   > **Tip:** 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 "Managing Application Entities" on page 16.

5. When you are finished, return to the top of the survey and click **Completed.**

   The application is displayed.

Appendix A: Application Entities

- "Application Entity Overview" below
- "Application Entity Sections" below

Application Entity Overview

Application Portfolio Management (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 APM user you are and the role or roles assigned to you. While APM analysts could have access to all types of entities, APM users typically have access to only application entities—and to some or all of the sections within an application entity.

> **Note:** You are able to view and edit all sections of entities that you create and entities for which you are the owner.

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.

Depending on your organization's implementation of 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 APM provides you with access to additional entities or fields, see the *Application Portfolio Management Analyst's Guide* for their descriptions.

For additional information about application entities, including how to perform tasks such as creating, searching, and editing entities, see "Managing Application Entities" on page 16.

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" below. The fundamental information that identifies the application.
- "Contacts" on page 49. The key contacts and stakeholders of the application.
- "Business Environment" on page 51. The critical business properties of the application.
- "Technical Environment" on page 52. The technologies used in the construction of the application, connectivity to other systems, and planned disposition.
- "Budget & Resources" on page 55. The nominal return, total cost of ownership, direct and indirect annual revenue, and average headcount supporting the application.
- "Service & Support" on page 56. The supporting environment and quality issues.
- "Usage & Scale" on page 58. The usage-based size measurements.
- "Rating" on page 59. The subjective measurements that reflect the business view of the application. These measurements are relative to the overall enterprise application portfolio.
- "Score" on page 70. The computed scores and adjustment factor for the total score.

> **Note:** 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 *Demand Management User's Guide.*

Identity

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

> **Note:** 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

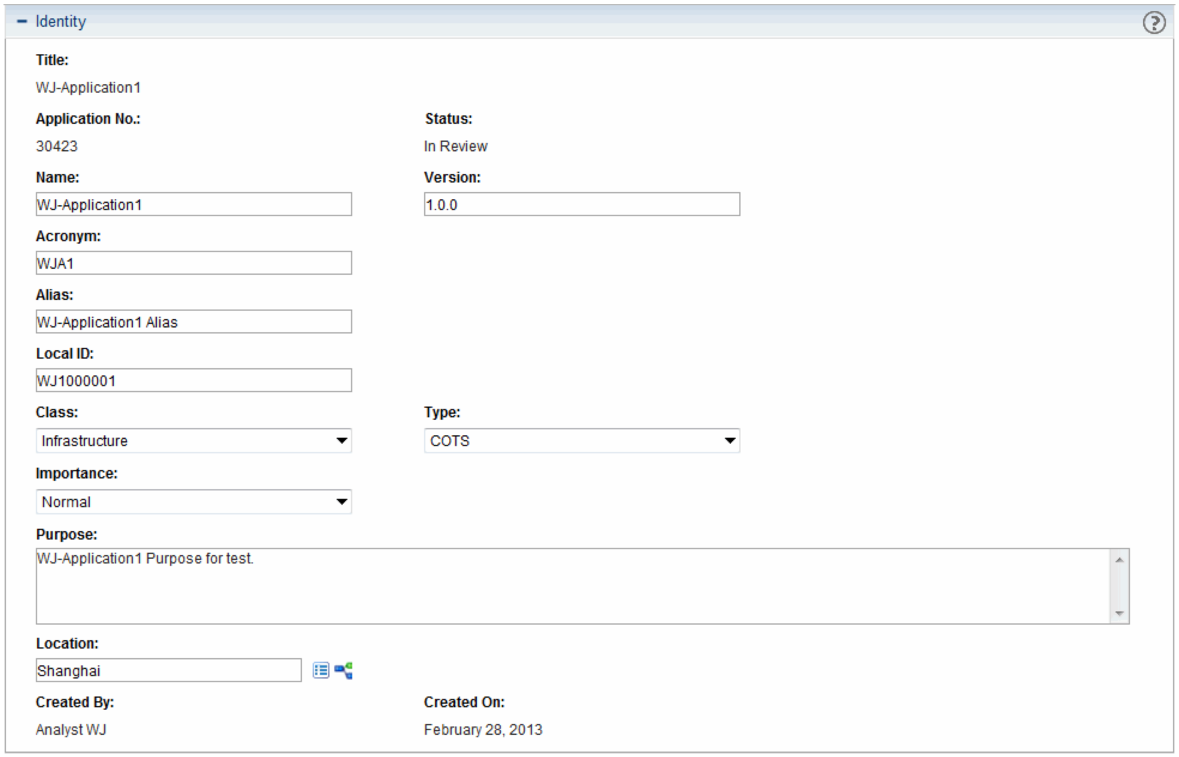


Table A-1. Application Identity fields

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.
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.

Table A-1. Application Identity fields, continued

Field (*Required)	Description
*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.
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

Table A-1. Application Identity fields, continued

Field (*Required)	Description
	the organization.
Purpose	The business or technical objective or function of the application.
Location	The physical location of the production application.
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.

> **Note:** 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).

> **Note:** 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 7.

Figure A-2. Application Contacts section

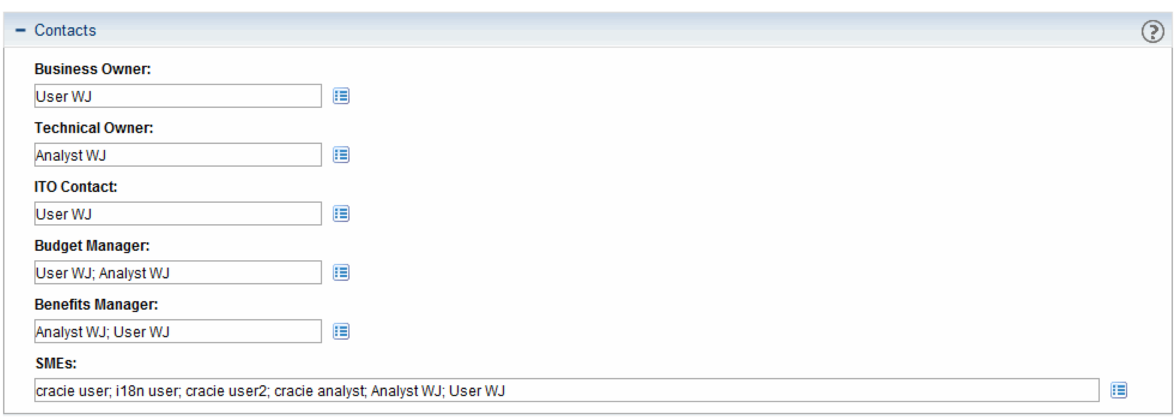


Table A-2. Application Contacts fields

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.
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. This field is displayed after a request for more information is sent.
Respondent Note	Comments that are emailed to the respondent when additional information about the application is requested. This field is displayed after a request for more information is sent.
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

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 Project and Portfolio Management Center (PPM Center). (For instructions for creating organization units, see the *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.

Table A-3. Application Business Environment fields, continued

Field	Description
	• **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.
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

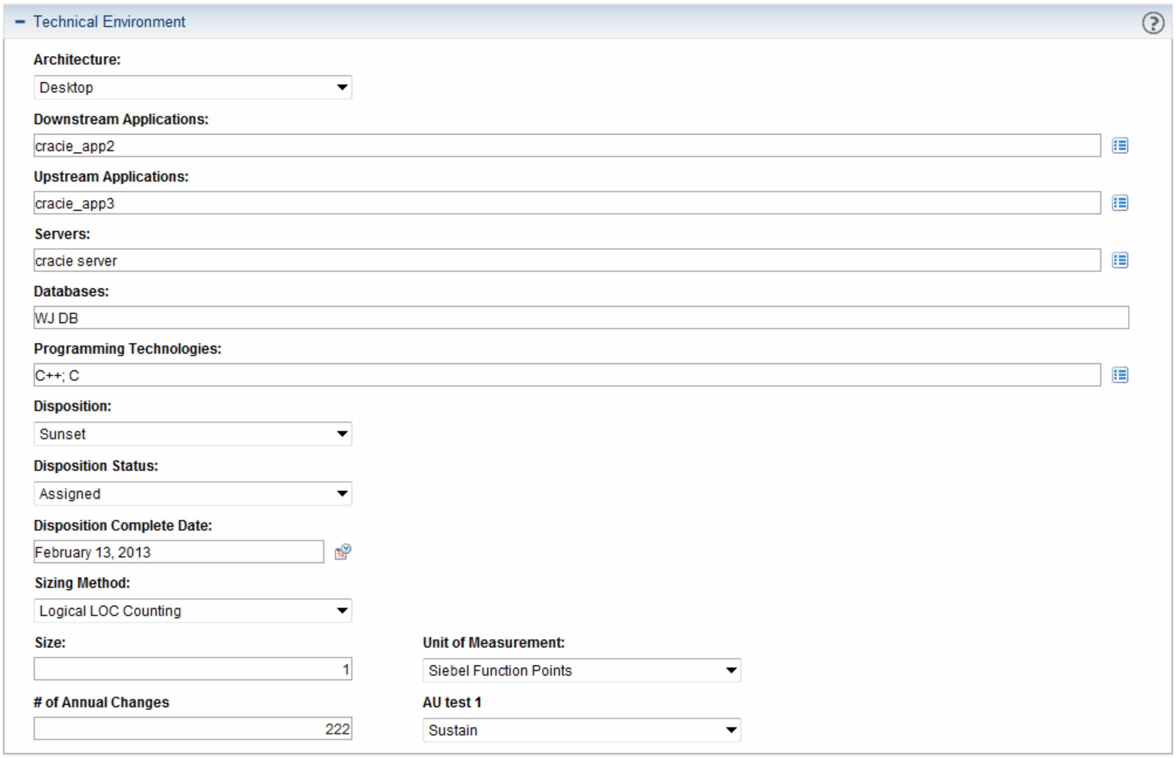


Table A-4. Application Technical Environment fields

Field	Description
Architecture	The type of system on which the application is deployed. • Mainframe • Distributed • Desktop • Other
Downstream Applications[a]	Zero, one, or more applications that depend on this application's output or updates.
Upstream Applications[a]	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, continued

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.
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

Table A-4. Application Technical Environment fields, continued

Field	Description
	• Adjusted Use Case Point • Number of Test Cases
# of Annual Changes	The number of change requests submitted per year.
a. When you configure an upstream or downstream relationship in an entity, you cannot see the relationship between the entities when you view the second entity. Make sure you also configure the relationship in the second entity so the relationship is visible in both entities. For example, if you configure entity B as a downstream entity in entity A, also configure entity A as an upstream entity in entity B. (This is not necessary for viewing relationships in dynamic graphing. Both relationships are visible when you view them in dynamic graphing regardless of whether they are configured in both entities.)	

Budget & Resources

In the Budget & Resources section, enter the nominal return, total cost of ownership, direct and indirect annual revenue, and the average headcount supporting the application.

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

Authorized users can access and edit the application's financial summary by clicking the link in the Financial Summary field. For additional information about the financial summary, see the description of the Financial Summary field in "Table A-5. Application Budget & Resources fields" on the next page.

Figure A-5. Application Budget & Resources section

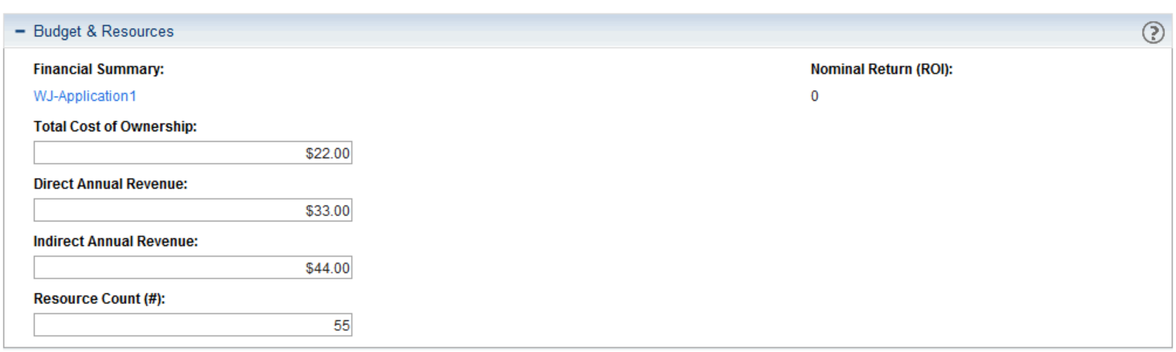


Table A-5. Application Budget & Resources fields

Field	Description
Financial Summary	A link to the financial summary of the application. The financial summary captures monthly forecast and actual costs and benefits. This link is available only to users designated as the application entity's Business Owner, Budget Manager, Benefits Manager, Respondent (when more information is requested), or owner. Only application entities and transformatin proposals have financial summaries. Each application entity and transformation proposal has its own financial summary. For more information about financial summaries, see the *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

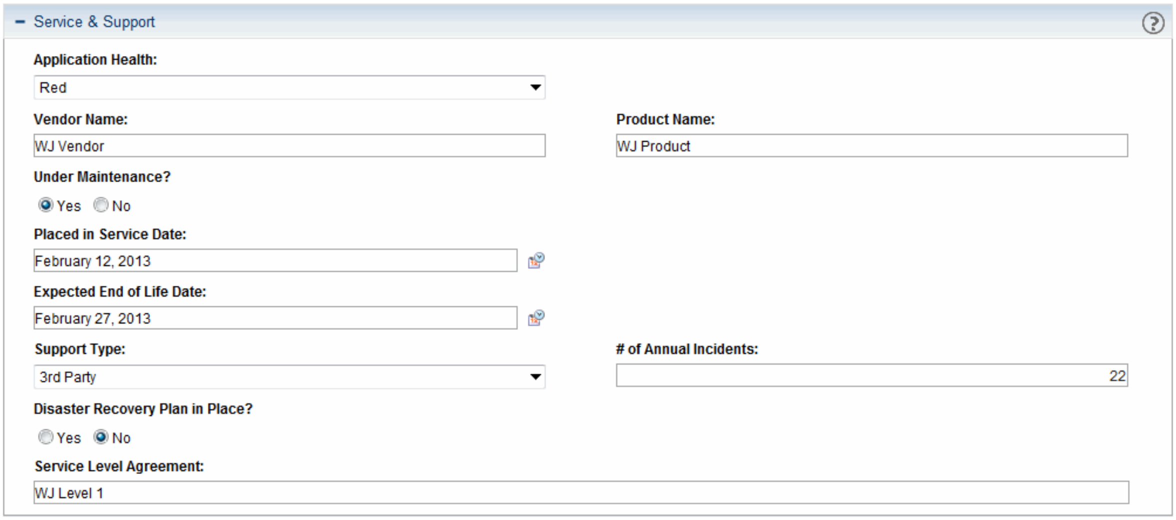


Table A-6. Application Service & Support fields

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, continued

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

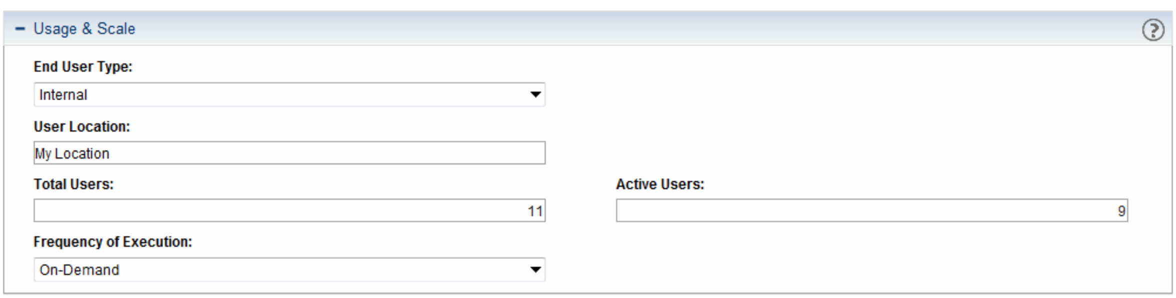


Table A-7. Application Usage & Scale fields

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.

Table A-7. Application Usage & Scale fields, continued

Field	Description
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


Rating
Application Rating Section
Relative Cost:
2 - Less than average
Relative Size:
3 - Larger than average
Operational Stability:
3 - Fairly stable
Maintainability:
1 - Very difficult
Complexity:
4 - Complex
Change Frequency:
3 - More than average
Functional Completeness:
Flexibility:
3 - Some effort to adapt to changes
Interface Complexity:
1 - Few and simple
Documentation:
4 - Most features
Scalability:
1 - Great effort to scale to expected needs
Performance:
5 - Always meets goals
Availability:
1 - Not available when many need it
Meets SLAs:
0 - Never meets
Size of User Base:
3 - Larger than average
Data Rating Section
Data Consistency:
2 - Some custom
Data Integrity:
2 - more than average data errors
Data Redundancy:
4 - Minimal redundancy
Vendor Rating Section
Vendor Financial Health:
2 - Below Average
Vendor Competition:
3 - Growing competition
Vendor Product Plans:
2 - Occassionally updating
Value Rating Section
Business Criticality:
2 - Less than average
Revenue Impact:
3 - More impact
Competitive Advantage:
3 - More advantage
Customer Visibility:
2 - Some customer interaction
Expense Reduction:
1 - Little impact on expense
Manual Workarounds Available:
2 - Some features
Risk Rating Section
Security Risk:
1 - Implements standard security practices
Architecture Risk:
4 - Does not adhere to enterprise standard practices
Technology Risk:
2 - Runs primarily on modern proven technology
Skills Risk:
3 - Specialized skills are somewhat available in the market
Compliance Risk:
1 - conforms to all compliance requirements
Business Continuity Risk:
1 - BCP defined

Table A-8. Application Rating fields

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
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

Table A-8. Application Rating fields, continued

Field	Description
	• 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
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

Table A-8. Application Rating fields, continued

Field	Description
	• 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
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

Table A-8. Application Rating fields, continued

Field	Description
	• 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
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

Table A-8. Application Rating fields, continued

Field	Description
	• 1 - Mostly custom • 2 - Some custom • 3 - Some standard • 4 - Mostly standard • 5 - Uses enterprise standard data formats and definitions
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
Vendor Competition	The maturity of the competitive landscape and the availability of alternate vendors.

Table A-8. Application Rating fields, continued

Field	Description
	• 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
Competitive	The gain this application provides compared to other vendor's similar

Table A-8. Application Rating fields, continued

Field	Description
Advantage	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, continued

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
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

Table A-8. Application Rating fields, continued

Field	Description
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

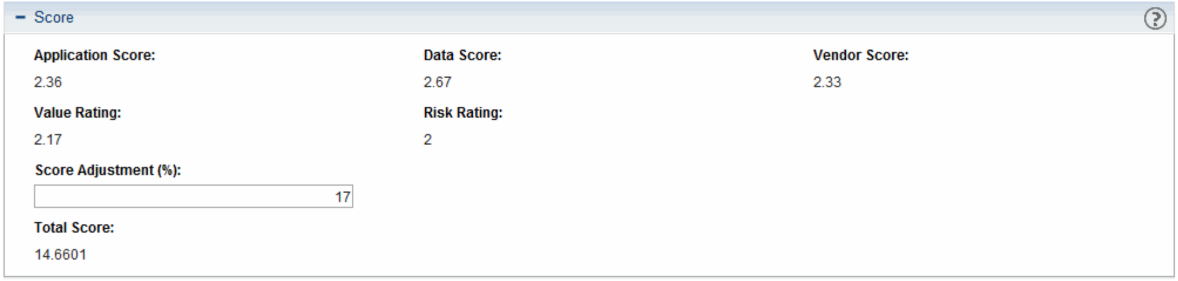


Table A-9. Application Score fields

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)
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.

Table A-9. Application Score fields, continued

Field	Description
	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)
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)]

Appendix B: PPM Dashboard Pages and Portlets

PPM Dashboard Pages and Portlets Overview

The shared PPM Dashboard pages and shared and configurable portlets that Application Portfolio Management (APM) provides for APM users are described in the following sections:

- "Shared PPM Dashboard Pages and Portlets" on the next page
- "Configurable Portlets" on page 76.

> **Note:** The My Applications and My Workstreams portlets are available as 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 or because of your organization's implementation of APM. Any PPM Dashboard pages and portlets added by your APM administrator are not documented in this guide.

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

For information about managing and using PPM Dashboards and portlets, see "Managing the PPM Dashboard and Portlets" on page 13, and the PPM Center *Getting Started* guide.

Shared PPM Dashboard Pages and Portlets

APM provides several shared PPM Dashboard pages and portlets for APM users. You cannot edit or delete shared PPM Dashboard pages and portlets.

This section provides a screenshot and description of each of the portlets included on the following shared PPM Dashboard pages:

- "Front Page " below
- "Applications Page" on the next page

For more information about shared PPM Dashboard pages and portlets, see the online help and "Managing the PPM Dashboard and Portlets" on page 13

Front Page

The Front Page PPM Dashboard page for APM users displays portlets that provide information you might want to track regularly. These portlets provide information 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 of the Front Page PPM Dashboard page

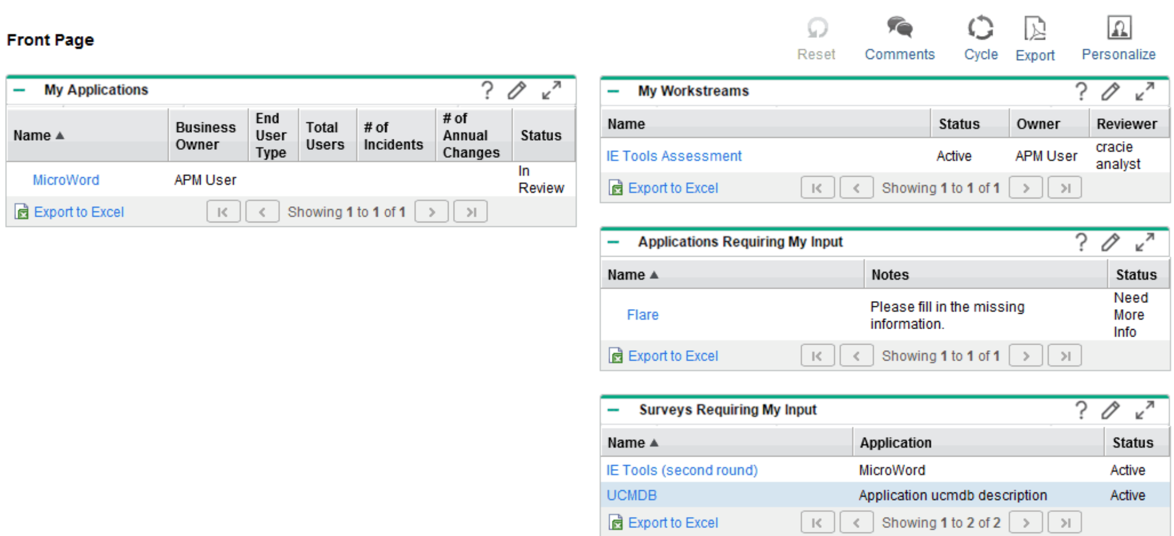


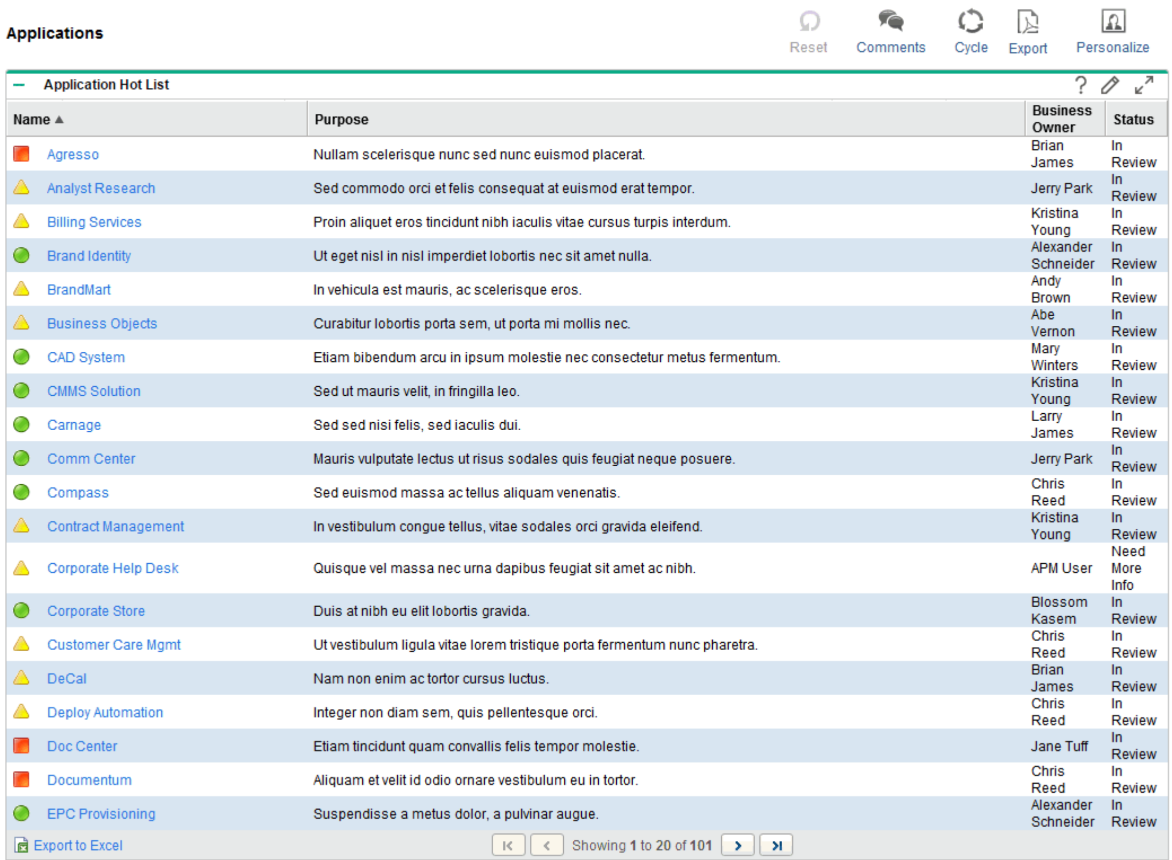
Table B-1. Shared portlets on the Front Page PPM Dashboard page

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.
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 of the Applications PPM Dashboard page



Name ▲	Purpose	Business Owner	Status
Agresso	Nullam scelerisque nunc sed nunc euismod placerat.	Brian James	In Review
Analyst Research	Sed commodo orci et felis consequat at euismod erat tempor.	Jerry Park	In Review
Billing Services	Proin aliquet eros tincidunt nibh iaculis vitae cursus turpis interdum.	Kristina Young	In Review
Brand Identity	Ut eget nisl in nisl imperdiet lobortis nec sit amet nulla.	Alexander Schneider	In Review
BrandMart	In vehicula est mauris, ac scelerisque eros.	Andy Brown	In Review
Business Objects	Curabitur lobortis porta sem, ut porta mi mollis nec.	Abe Vernon	In Review
CAD System	Etiam bibendum arcu in ipsum molestie nec consectetur metus fermentum.	Mary Winters	In Review
CMMS Solution	Sed ut mauris velit, in fringilla leo.	Kristina Young	In Review
Carnage	Sed sed nisi felis, sed iaculis dui.	Larry James	In Review
Comm Center	Mauris vulputate lectus ut risus sodales quis feugiat neque posuere.	Jerry Park	In Review
Compass	Sed euismod massa ac tellus aliquam venenatis.	Chris Reed	In Review
Contract Management	In vestibulum congue tellus, vitae sodales orci gravida eleifend.	Kristina Young	In Review
Corporate Help Desk	Quisque vel massa nec urna dapibus feugiat sit amet ac nibh.	APM User	Need More Info
Corporate Store	Duis at nibh eu elit lobortis gravida.	Blossom Kasem	In Review
Customer Care Mgmt	Ut vestibulum ligula vitae lorem tristique porta fermentum nunc pharetra.	Chris Reed	In Review
DeCal	Nam non enim ac tortor cursus luctus.	Brian James	In Review
Deploy Automation	Integer non diam sem, quis pellentesque orci.	Chris Reed	In Review
Doc Center	Etiam tincidunt quam convallis felis tempor molestie.	Jane Tuff	In Review
Documentum	Aliquam et velit id odio ornare vestibulum eu in tortor.	Chris Reed	In Review
EPC Provisioning	Suspendisse a metus dolor, a pulvinar augue.	Alexander Schneider	In Review

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Table B-2. Shared portlet on the Applications PPM Dashboard page

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

You can add configurable portlets to your PPM Dashboard pages, and then customize the portlets to suit your information needs.

This section provides a screenshot and description of each of the following configurable portlets provided for APM users:

- "List of Applications (User)" below
- "My Applications" on page 79
- "My Surveys" on page 81
- "My Workstreams" on page 82

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

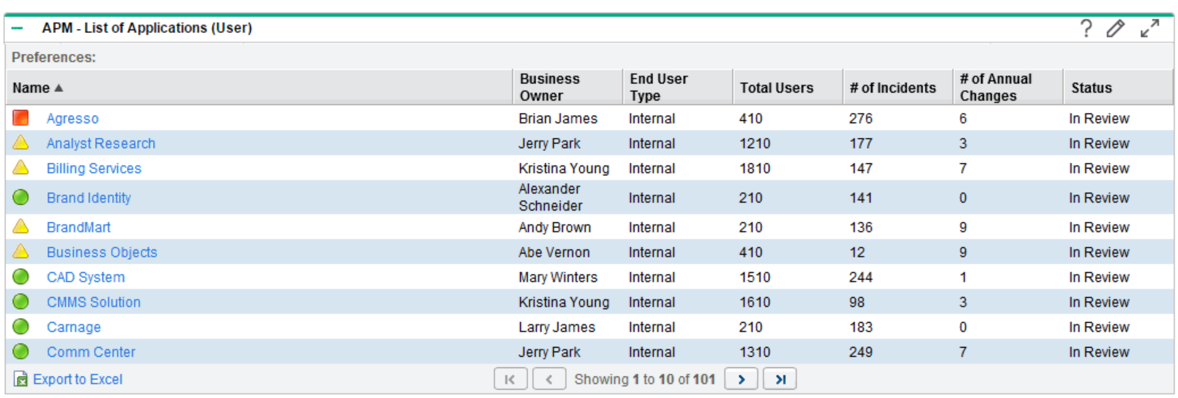
For more information about the configurable portlets, see the online help and "Managing the PPM Dashboard and Portlets" on page 13.

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 of the 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	Brian James	Internal	410	276	6	In Review
Analyst Research	Jerry Park	Internal	1210	177	3	In Review
Billing Services	Kristina Young	Internal	1810	147	7	In Review
Brand Identity	Alexander Schneider	Internal	210	141	0	In Review
BrandMart	Andy Brown	Internal	210	136	9	In Review
Business Objects	Abe Vernon	Internal	410	12	9	In Review
CAD System	Mary Winters	Internal	1510	244	1	In Review
CMMS Solution	Kristina Young	Internal	1610	98	3	In Review
Carnage	Larry James	Internal	210	183	0	In Review
Comm Center	Jerry Park	Internal	1310	249	7	In Review

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To select the type of data that is displayed in this portlet and how the data is displayed, set the preference settings and filters.

Table B-3. Preference settings and filters for the List of Applications (User) portlet

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.
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

Table B-3. Preference settings and filters for the List of Applications (User) portlet, continued

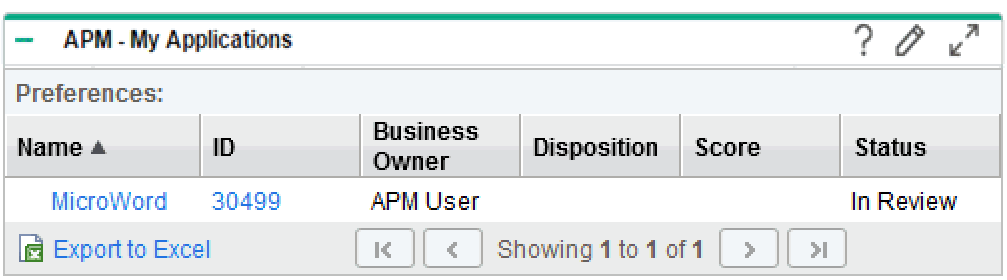
Field (*Required)	Description
	Specify the number of applications displayed in a maximized portlet. Type any integer greater than zero.
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. See the online help for the portlet for a description of 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 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 of the My Applications portlet



To select the type of data that is displayed in this portlet and how the data is displayed, set the preference settings and filters.

Table B-4. Preference settings and filters for the My Applications portlet

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.

Table B-4. Preference settings and filters for the My Applications portlet, continued

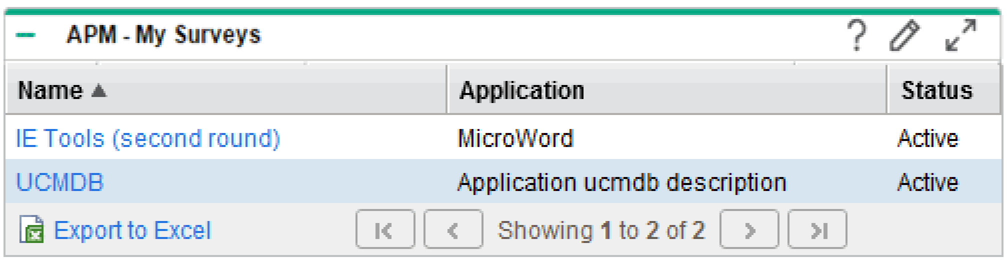
Field (*Required)	Description
Health	Select zero, one, or more color-coded indicators of the application's health to display. Only applications that have this health are displayed. If no health is specified, all applications for which data is available are displayed.
Status	Select a status of the applications to display. Only applications that have this status are displayed.
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.
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 of the My Surveys portlet



To select the type of data that is displayed in this portlet and how the data is displayed, set the preference settings and filters.

Table B-5. Preference settings and filters for the My Surveys portlet

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.
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

Table B-5. Preference settings and filters for the My Surveys portlet, continued

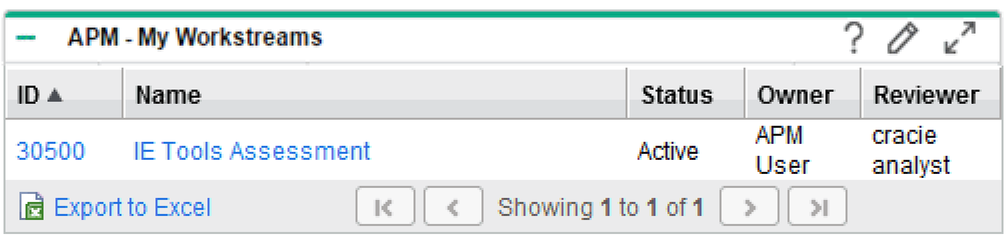
Field (*Required)	Description
	column.
Displayed Columns	Select the names of the columns to display in the portlet and the order in which they are displayed.
Additional Columns Displayed in Maximized View	Select the names of the columns to display in a maximized portlet and the order in which they are 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 of the My Workstreams portlet



To select the type of data that is displayed in this portlet and how the data is displayed, set the preference settings and filters.

Table B-6. Preference settings and filters for the My Workstreams portlet

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

Table B-6. Preference settings and filters for the My Workstreams portlet, continued

Field (*Required)	Description
	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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Feedback on Application Portfolio Management User's Guide (Project and Portfolio Management Center 9.40)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to your_IE_team_PDL@hpe.com.

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