

Focal Point[®]

APM Workspace Deployment Guide

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- Focal Point Business Rule Development and Usage Guide
- Focal Point Custom Chart Plug-in Reference Manual
- Focal Point REST RDF API Reference Manual
- Focal Point RESTful API Reference Manual
- Focal Point Web Services API Reference Manual

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1 Application portfolio management workspace

When workspace administrators set up the application portfolio management workspace for their organizations, they can use this guide to customize the workspace. This guide contains instructions for the actions that are required after creating or importing a workspace. The guide also provides an overview of modules, roles, views, home pages, and the implementation of scorecards.

Prerequisites to customize workspaces

Before you customize your workspace, you must be familiar with the application portfolio management workspace in Focal Point. You must understand the use cases that this workspace supports.

You must also be familiar with customizing Focal Point.

Configuring predefined expressions and home pages

Note This section contains instructions for users of Focal Point version 6.5.0 only. If you use version 6.5.1 or later, you do not need to follow these instructions unless expressions and home page views are broken and you need to troubleshoot.

After you create an application portfolio management workspace from the workspace template or import a workspace that was built from the template, you must fix a few predefined expressions and home pages.

Activating predefined expressions

The application portfolio management workspace contains several predefined expressions and business rules. Because the expressions and business rules contain database IDs that are unique for your environment, you must refresh the expressions and business rules. Refresh the business rules and expressions once for every imported or instantiated workspace. The following sections contain information about which IDs must be modified in which expressions, and about how you can find the database IDs for your environment.

To activate predefined expressions, you must enable the status bar for your browser. The following table includes the steps to enable the status bar in FireFox and Microsoft® Internet Explorer.

Browser	Steps
FireFox 4	Click View. Select Status Bar.
Internet Explorer 9	Click View. Click Toolbars. Select Status Bar.

Updating the LinkInfo business rule

The LinkInfo business rule is used to calculate the value for the Variance per Application attribute in the Portfolios module. Because the Member ID parameter in the LinkInfo business rule differs for each database, you must refresh that parameter. Use the ID for an administrator in the workspace. For more information, see the “LinkInfo business rule” topic in the Focal Point help system.

To identify the elementID and update the LinkInfo business rule:

- 1 Identify the Member ID parameter by clicking **Members > Members**, and selecting the workspace administrator to use.
- 2 In the upper-right corner of the attribute list, hover your cursor over the **Edit** icon. The status bar in the lower-left corner displays `javascript:editElement (xxx)`, where `xxx` is the member ID. Make a note of the value shown.
- 3 Click **Configure > Attributes**.
- 4 Select the **Portfolios** module and edit the Variance per Application attribute. The business rule is displayed in the Default Value attribute. For example:


```
=LinkInfo("Applications",",",Cost Variance,Planned Cost up til Now,Total Actual Costs to Now,Current Variance","13",'Applications')
```
- 5 Replace the third parameter with the member ID number from step 1. The third parameter is the numerical value, which in the example is 13.
- 6 Click **Copy Default Value To All Elements**.
- 7 Click **OK** to complete the updates.

Updating the ListAttributeSum business rule

The syntax for ListAttributeSum business rule is in the following format:

```
ListAttributeSum("List Attribute ID","View ID", "Attribute ID","User ID",
'List Attribute Name', "listen_to=Source Attribute Name", "listen_to=View
Rule Attribute Name")
```

ListAttributeSum returns the sum of Integer or Float attributes for elements in a view in a list attribute. The parameters of ListAttributeSum use the values that are shown in the following table.

Parameter	Description
List Attribute ID	The ID of the target attribute, which is an incoming links or link list attribute. This attribute links to elements in the source module that contains the attribute to summarize.
View ID	The ID of the view that determines which elements to include in the calculation.
Attribute ID	The ID of the source attribute to summarize.
User ID	The global user ID of the member who can access the view that is used for ListAttributeSum.

For example, the Number of Related Applications attribute in the Portfolios module uses the ListAttributeSum business rule to sum the number of applications that are associated with a portfolio.

Other attributes also contain the ListAttributeSum business rule. Those attributes are mentioned later in this section.

To update the Number of Related Applications attribute in the Portfolios module, use the following instructions. The steps to update other attributes are similar.

In the procedure, as an example, the user is Admin and the Number of Related Applications attribute has the following value:

```
=ListAttributeSum("232","299","407","13",'Applications',"listen_to=List
Size")
```

- 1 Click **Configure > Attributes**.
- 2 Select the **Portfolios** module and then select the **Number of Related Applications** attribute. Replace the parameters as described in the following table.

Parameter	Steps to replace the parameter
"List Attribute ID"	<p>Click Configure > Attributes and select Portfolios.</p> <p>Click Configuration Overview. A window opens.</p> <p>Scroll to the Applications section, where the attribute type is Incoming Links. Note the attribute ID for the Applications attribute.</p> <p>Replace the first parameter with the ID. In this example, the first parameter is 232.</p>
"View ID"	<p>Click Configure > Views.</p> <p>Expand All members > Configuration views > Helper views > Applications.</p> <p>In the upper-right corner of the attribute list, hover your cursor over the Edit icon. The status bar displays <code>javascript:editElement (xxx)</code>, where <code>xxx</code> is the ID.</p> <p>Replace the second parameter with the ID. In this example, the second parameter is 299.</p>
"Attribute ID"	<p>Click Configure > Attributes and select Applications</p> <p>Click Configuration Overview.</p> <p>Note the attribute ID for the List Size attribute.</p> <p>Replace the third parameter with the ID. In this example, the third parameter is 407.</p>
"User ID"	<p>Click Members > Members, and select a global user.</p> <p>In the upper-right corner of the attribute list, hover your cursor over the Edit icon. The status bar in the lower-left corner displays <code>javascript:editElement (xxx)</code>, where <code>xxx</code> is the ID.</p> <p>Replace the fourth parameter with the ID. In this example, the ID is 13.</p>

3 After you replace the parameters, click **Copy Default Value to All Elements**.

4 Click **OK** to complete the update.

Repeat this procedure to update the values for the ListAttributeSum business rules. The following table contains the attributes that use the ListAttributeSum business rule.

Note The User ID is generally the same for the following business rules.

Attribute	Location of ListAttributeId	Location of view ID	Location of attribute ID
Portfolio module			
Number of Related Applications	Attribute ID of the Applications attribute. Click Configure > Attributes > Portfolios.	Element ID of the view on the Applications page. To open the Applications page, click Configure > Views > All Members > Configuration Views >	Attribute ID of the List Size attribute. Click Configure > Attributes > Applications > Configuration Overview.
Business Risks and Issues		Helper Views > Applications.	Attribute ID of the M-BusRisk attribute. Click Configure > Attributes > Applications > Configuration Overview.
IT Risks and Issues			Attribute ID of the M-IT-Risk attribute. Click Configure > Attributes > Applications > Configuration Overview.
Business Strategy Alignment			Attribute ID of the M-BusAlign attribute. Click Configure > Attributes > Applications > Configuration Overview.
Business Criticality			Attribute ID of the M-BusCrit attribute. Click Configure > Attributes > Applications > Configuration Overview.
IT Strategy Alignment			Attribute ID of the M-IT-Align attribute. Click Configure > Attributes > Applications > Configuration Overview.

Attribute	Location of ListAttributeId	Location of view ID	Location of attribute ID
Projected Annual Cost	Attribute ID of the Applications attribute. Click Configure > Attributes > Portfolios.	Element ID of the view on the Applications page. To open the Applications page, click Configure > Views > All Members > Configuration Views >	Attribute ID of the Projected Annual Cost attribute. Click Configure > Attributes > Applications > Configuration Overview.
Total Sum of Calculated Funding Changes		Helper Views > Applications.	Attribute ID of the Calculated Annual Cost attribute. Click Configure > Attributes > Applications > Configuration Overview.
Total Sum of Proposed Funding Changes			Attribute ID of the Proposed Annual Cost attribute. Click Configure > Attributes > Applications > Configuration Overview.
Gold Classification Total Score			Attribute ID of the Gold Classification Score attribute. Click Configure > Attributes > Applications > Configuration Overview.
Aggregated Cost Variance			Attribute ID of the Cost Variance Calculation attribute. Click Configure > Attributes > Applications > Configuration Overview.

Attribute	Location of ListAttributeId	Location of view ID	Location of attribute ID
Number of Gold	Attribute ID of the Gold Applications attribute. Click Configure > Attributes > Portfolios > Configuration Overview.	Element ID of the view on the Gold Applications page. To open the Gold Applications page, click Configure > Views > All Members > Configuration Views > Helper Views > Gold Applications.	Attribute ID of the Classification attribute. Click Configure > Attributes > Applications > Configuration Overview.
Number of Active Applications	Attribute ID of the Active Applications attribute. Click Configure > Attributes > Portfolios > Configuration Overview.	Element ID of the view on the Active Applications page. To open the Active Applications page, click Configure > Views > All Members > Configuration Views > Helper Views > Active Applications	Attribute ID of the List Size attribute. Click Configure > Attributes > Applications > Configuration Overview.
Number of Retired Applications	Attribute ID of the Retired Applications attribute. Click Configure > Attributes > Portfolios > Configuration Overview.	Element ID of the view on the Retired Applications page. To open the Retired Applications page, click Configure > Views > All Members > Configuration Views > Helper Views > Retired Applications	Attribute ID of the List Size attribute. Click Configure > Attributes > Applications > Configuration Overview.
Criteria module			

Attribute	Location of ListAttributeId	Location of view ID	Location of attribute ID
# of Applications	Attribute ID of the Applications attribute. (Configure > Attributes > Criteria > Configuration Overview)	Element ID of the view on the Applications page. To open the Applications page, click Configure > Views > All members > Configuration Views > Helper Views > Applications.	Attribute ID of the List Size attribute. Click Configure > Attributes > Applications > Configuration Overview.
# of Projects	Attribute ID of the Projects attribute. Click Configure > Attributes > Criteria > Configuration Overview.	Element ID of the view on the Projects page. To open the Projects page, click Configure > Views > All members > Configuration Views > Helper Views > Projects.	Attribute ID of the List Size attribute. Click Configure > Attributes > Projects > Configuration Overview.

Note When you update business rules on the Attributes page of the **Configure** menu, you can also refer to the Administrator Notes about the attribute.

Reorganizing home pages

When you set up your application portfolio management workspace, the order of the home page windows for different roles might change. You must reorganize the home pages.

To reorganize a home page:

- 1 Click **Members > Members.**
- 2 Select the folder that represents the role, and then edit the My Home attribute.
- 3 Use the arrow keys to reorganize the windows for each role, as shown in the following table, and click **OK.**

Role	Left	Middle	Right
Entry Demo	Portfolio Overview	Application by Classification	
	# of Application by Business Alignment	Applications Failing SLAs	
	Application Lifecycle Distribution	Application / Business Strategy Alignment	
	Strategic Objectives		
Demo	Manage the Portfolio	Manage the assessment process	Manage the transformation
	Portfolio Summary	Invest / Divest Strategy	Business Unit Financials
	Financial Trends	# of Applications for each Investment Category	Project Lifecycle Distribution
	Applications Fail SLA	Investment Rating	Project / Business Strategy Alignment
	Application Lifecycle Distribution	Assessment Status	
	Application / Business Strategy Alignment	# of Applications by Proposed Disposition	

Role	Left	Middle	Right
<i>Application business owner</i>	Manage the Portfolio	Manage the assessment Process	Manage the Transformation
	My Portfolios Summary	My Applications per Investment Category	Project related to my applications
	My Application Summary	Investment Rating of My Applications	
	Financial Trends of My Applications	Assessment Status of My Applications	
	My Applications Failing SLAs	Applications Requiring My Actions	
	My Application Lifecycle Distribution	My Applications by Proposed Disposition	
	Strategic Objectives		
	Application Alignment to Objectives		
<i>Application architect</i>	Manage the Portfolio	Manage the assessment Process	Manage the Transformation
	My Applications Summary	Investment Rating of My Applications	Project Related to My Applications
	My Applications Failing SLAs	Assessment Status of My Applications	
	My Applications Lifecycle Distribution	Applications Requiring My Actions	
	Strategic Objectives	# of Applications by Proposed Disposition	
	Applications Alignment to Objectives		

Role	Left	Middle	Right
Enterprise architect	Manage the Portfolio	Manage the Assessment process	Manage the transformation
	Financial Trends	# of Applications for each Investment Category	Project Lifecycle Distribution
	Applications Fail SLA	Investment Rating	Project Alignment to Objectives
	Application Lifecycle	Assessment Status	
	Distribution	# of Applications by Proposed Disposition	
	Strategic Objectives		
	Active Application		
	Alignment to Objectives		

Role	Left	Middle	Right
Portfolio analyst	Manage the Portfolio	Manage the assessment Process	Manage the Transformation
	My Portfolios Financial Summary	# of Applications in My Portfolio per Investment Category	My Project Lifecycle Distribution
	My Portfolios Financial Trends	Investment Distribution for My Portfolios	Project Alignment to Objectives
	Applications in My Portfolios Failing SLAs	Investment Rating of Applications in my Portfolios	
	Lifecycle Distribution of Application in My Portfolio	Assessment Status of Applications in My Portfolios.	
	Strategic Objectives	Applications Requiring My Actions	
	Active Application Alignment to Objectives	# of Applications in My Portfolios by Proposed Disposition.	
<i>Project management office (PMO)</i>	Manage the Transformation.		
	Business Unit Financials		
	Project Lifecycle Distribution		
	Project Alignment to Objectives.		

Role	Left	Middle	Right
<i>Steering committee</i>	Manage the Portfolio	Manage the assessment process	Manage the transformation
	Portfolio Summary	Invest / Divest Strategy	Business Unit Financials
	Financial Trends	Investment Distribution by Portfolio	Project Lifecycle Distribution
	Applications Failing SLAs	Application per Investment Category	Project Alignment to Objectives
	Application Lifecycle Distribution	Investment Rating	
	Strategic Objectives	Application Assessment Status	
	Active Application Alignment to Objectives	# of Applications by Proposed Disposition	

Structure of the application portfolio management workspace

Modules in the application portfolio management workspace

The application portfolio management workspace contains several predefined modules.

Modules	Description
Applications	<p>This module is the central entity in the workspace, and contains all of the applications. Attributes capture the following information:</p> <ul style="list-style-type: none">▪ Overview information▪ Financial information▪ Business-related information, such as business value and criticality▪ Technical information▪ Various scorecards <p>To determine investment levels and consolidation and modernization targets, analyze the data in this module.</p> <p>The application module contains a workflow for the application lifecycle and another workflow for the application assessment process.</p> <p>Each element in this module represents one application.</p>
Portfolios	<p>This module aggregates groups of applications into a set of portfolios. Attributes capture overview information and aggregated financials and scores that are related to portfolio composition, value, and risk.</p> <p>Each element in this module represents one portfolio.</p>
Weights	<p>This supporting module contains the weights that are assigned to specific application attributes. These weights are used to calculate different scorecards and investment levels.</p> <p>Each entity in this module represents one profile for determining organizational priorities and investment models. You can have one or several of these profiles.</p>
Criteria	<p>This supporting module defines the criteria to be used for prioritization and visualization views for the Applications and Projects modules. The criteria represent attributes that can be selected as dimensions (x-axis, y-axis, bubble size, and so on) in views.</p> <p>The criteria also include the strategic objectives that are defined for an organization.</p> <p>Folders are used to group the criteria. Each element in the folder is a single criterion or objective.</p>

Modules	Description
Projects	<p>This module contains projects. Projects are created based on the application assessments and Application Portfolio Management initiatives to execute identified changes.</p> <p>The information that is collected includes planning data, business cases, risk information, and scorecards to determine which projects to fund. The Projects module provides workflow support.</p> <p>This module has one element for each project.</p> <p>Note For more rigorous project portfolio management to support your application portfolio management efforts, use the IT Portfolio workspace. That workspace contains a more complete set of attributes and supporting modules and views.</p>
Business Units	<p>This module includes the business units in the organization. Projects are linked to business units so that the project status and financials can be tracked at a business unit level.</p>
Risks	<p>This module includes risks for the portfolio, projects, and application.</p> <p>Note The risk module is currently not linked to the modules for portfolio, projects, and applications. After the risk module is linked to those modules, the risk module can be used for a more comprehensive treatment of risks within the workspace.</p>
Images	<p>This module includes the images that are in the workspace.</p>

To view the modules in the workspace, click **Configure > Modules**. You can add, delete, or modify the modules as needed.

Note If you delete a module, you might break dependencies and links. The modules each have predefined attributes that you can also modify, delete or supplement.

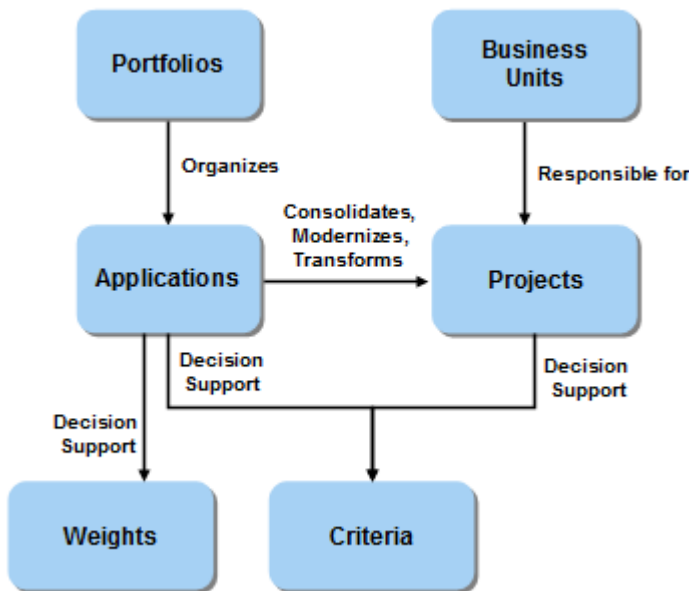
Each view is associated with a module, as indicated by the view icon. On the Views page of the **Configure** menu, views are sorted by role and view type.

To sort the views by module:

- 1 In the workspace, click **Preferences**.
- 2 Click **Miscellaneous Settings**.
- 3 Under the **View Sort** field, click **By Attribute**, and select **View definition**.
- 4 Click **OK**.

Module relationships

The following diagram shows how the modules in the application portfolio management template are related.



A portfolio contains one or more applications that are related. Each application belongs in only one portfolio. An application has weights, which are used calculate the scorecards that support decision-making.

A business unit is responsible for one or more projects. A project represents a consolidation, modernization, or transformation project. One or more applications that impact the project are assigned to the project.

The criteria module provides evaluation criteria for applications and projects to prioritize the elements in the module.

The information model does not include information about relationships with these modules:

- The Members module, which defines the users who can access the workspace and their roles. For example, the Members module links to the application owner and application architect.
- Standard modules that support configuration, such as Images, Views, Checkpoints, Saved Charts, Generated Reports, Resource Types, Releases, Saved Plans, and Baselines.

Roles in the application portfolio management workspace

The application portfolio management template defines several roles, such as application business owner, portfolio analyst, and project management office. You can modify the roles and define your own roles.

To view and manage roles and workspace members, click **Members > Members**.

Role	Description
Application business owner	This role has business responsibility for one or more applications. The application business owner understands the business context of an application. This role is responsible for maintaining business-related information for the application, such as financials, strategic alignment, criticality, and growth potential. The application business owner relies on an application architect for the technical information about the application.
Application architect	This role has technical responsibility for one or more applications. The application architect understands the technical context of an application and is responsible for maintaining technical information for the application, such as IT alignment, dependencies, and code complexity.
Enterprise architect	This role is responsible for the technical solutions, architecture, and technology standards that are used across a set of applications, within one or more portfolios. The enterprise architect is the technical counterpart to the portfolio analyst.
Portfolio analyst	This role is responsible for one or more application portfolios, and is responsible for the overall application portfolio management process. The portfolio analyst represents the execution arm of the steering committee and coordinates the other roles in executing portfolio assessment and management.
Project management office (PMO)	This role is responsible for project proposals and execution, and owns the project portfolio management process. This workspace template defines a basic project portfolio workflow. The IT Portfolio Management template provides a more complete project portfolio management solution. If you need more project-related capabilities, use the IT Portfolio Management workspace with the application portfolio management workspace. Alternatively, you can copy elements from the IT Portfolio Management into application portfolio management workspace.
Steering committee	This role makes decisions about the application portfolio, including determining investment levels, identifying applications requiring action, and approving proposals for application disposition and projects. The steering committee also monitors the portfolio health and reviews the strategic alignment of applications and projects.

Home pages in the application portfolio management workspace

Each role has a home page that is displayed when the workspace is accessed. A home page consists of one or more windows that contain information that is relevant to users in that role. The following table shows the home pages for each role. The roles for entry level demo and demo are not included in this table because those roles are typically not customized, but removed before production usage.

Roles	Home page windows
All users	<p data-bbox="443 607 1465 685">MANAGE-THE-PORTFOLIO: This column contains the reports that are used to manage the portfolio.</p> <p data-bbox="443 719 1465 797">Strategic Objectives: This report displays all of the strategic objectives and their weights.</p> <p data-bbox="443 831 1465 909">MANAGE-THE-ASSESSMENT-PROCESS: This column contains the reports that are used to manage the application assessments.</p> <p data-bbox="443 943 1465 1014">MANAGE-THE-TRANSFORMATION: This column contains the reports that are used to manage the transformation projects.</p>

Roles	Home page windows
<p><i>Application business owner</i></p>	<p>MANAGE-THE-PORTFOLIO</p> <p>My Portfolios Summary: This view shows a summary of portfolio information, including financials information. The view displays only the portfolios that contain applications in which the current user is the application business owner.</p> <p>My Application Summary: This view shows a summary of information about applications in which the current user is the application business owner.</p> <p>Financial Trends of My Applications: This view shows the trend line of the accumulated costs of applications in which the current user is the application business owner.</p> <p>My Application Failing SLAs: For applications in which the current user is the application business owner, this view shows the applications that failed SLAs at level 4 and 5.</p> <p>My Application Lifecycle Distribution: This statistic view shows the number of applications, distributed by application state, in which the current user is the application business owner.</p> <p>Application Alignment to Objectives: This view shows the distribution of applications across strategic objectives. The view displays only the strategic objectives that are related to applications in which the current user is the application business owner.</p> <p>MANAGE-THE-ASSESSMENT-PROCESS</p> <p># My Applications per Investment Category: This statistic view shows the number of applications, distributed by investment category, in which the current user is the application business owner.</p> <p>Investment Ration of My Applications: This statistic view shows the number of applications, distributed by start rating score, in which the current user is the application business owner.</p> <p>Assessment Status of My Applications: This statistic view shows the number of applications, distributed by assessment state, in which the current user is the application business owner.</p> <p>Applications Requiring My Actions: This view shows a list of the applications in which the current user must take action as the application business owner.</p> <p># of Applications by Proposed Disposition: This statistic view shows the number of applications, distributed by recommended disposition methods, in which the current user is the application business owner.</p> <p>MANAGE-THE-TRANSFORMATION</p> <p>Project Related to My Applications: This view shows a list of all of the projects that impact the applications where the current user is the application business owner.</p>

Roles	Home page windows
<i>Application architect</i>	<hr/> <p data-bbox="448 286 775 313">MANAGE-THE-PORTFOLIO</p> <p data-bbox="448 353 1422 427">My Application Summary: This view shows a summary of the applications in which the current user is an application architect.</p> <p data-bbox="448 465 1437 584">My Application Failing SLAs: This view shows the list of the applications that failed SLAs at level 4 and 5. The view displays only the applications in which the current user is an application architect.</p> <p data-bbox="448 622 1453 741">My Application Lifecycle Distribution: This statistic view shows the number of applications, distributed by application state, in which the current user is an application architect.</p> <p data-bbox="448 779 1461 927">Application Alignment to Objectives: This view shows the distribution of active applications across strategic objectives. The view displays only the strategic objectives that are related to applications in which the current user is an application architect.</p> <p data-bbox="448 965 919 992">MANAGE-THE-ASSESSMENT-PROCESS</p> <p data-bbox="448 1032 1461 1151">Investment Ration of My Applications: This statistic view shows the number of applications, distributed by start rating score, in which the current user is an application architect.</p> <p data-bbox="448 1189 1461 1308">Assessment Status of My Applications: This statistic view shows the number of applications, distributed by assessment state, in which the current user is an application architect.</p> <p data-bbox="448 1346 1461 1420">Applications Requiring My Actions: This view shows a list of the applications in which the current user must take action.</p> <p data-bbox="448 1458 1461 1576"># of Applications by Proposed Disposition: This statistic view shows the number of applications, distributed by recommended disposition methods, in which the current user is an application architect.</p> <p data-bbox="448 1615 871 1641">MANAGE-THE-TRANSFORMATION</p> <p data-bbox="448 1682 1437 1731">Project Related to My Applications: This view shows a list of the projects that impact the applications in which the current user is an application architect.</p> <hr/>

Roles	Home page windows
<i>Enterprise architect</i>	<hr/> <p data-bbox="443 280 774 313">MANAGE-THE-PORTFOLIO</p> <p data-bbox="443 347 1487 425">Portfolios Summary: This view shows a summary of information about all of the portfolios, including financials information.</p> <p data-bbox="443 459 1487 537">Financial Trends: This view shows the trend line of the accumulated costs of all of the portfolios over time.</p> <p data-bbox="443 571 1487 649">Application Lifecycle Distribution: This statistic view shows the number of applications distributed by application state.</p> <p data-bbox="443 683 1487 761">Active Application Alignment to Objectives: This view shows the distribution of all of the active applications across the strategic objectives.</p>
	<p data-bbox="443 784 917 817">MANAGE-THE-ASSESSMENT-PROCESS</p> <p data-bbox="443 851 1487 929">Application Assessment Status: This statistic view shows the number of all of the applications distributed by assessment state.</p> <p data-bbox="443 963 1487 1041">Applications Requiring My Actions: This view shows a list of the applications that require action from the enterprise architect.</p> <p data-bbox="443 1075 1487 1153"># of Applications by Proposed Disposition: This statistic view shows the number of all of the applications distributed by recommended disposition methods.</p>
	<p data-bbox="443 1176 869 1209">MANAGE-THE-TRANSFORMATION</p> <p data-bbox="443 1243 1487 1321">Project Lifecycle Distribution: This statistic view shows the number of all of the projects distributed by project state.</p> <p data-bbox="443 1355 1487 1433">Project Alignment to Objectives: This view shows the distribution of all of the projects across the strategic objectives.</p> <hr/>

Roles	Home page windows
<i>Portfolio analyst</i>	<p data-bbox="443 282 778 315">MANAGE-THE-PORTFOLIO</p> <p data-bbox="443 349 1482 427">My Portfolios Financial Summary: This view shows a summary of the financial information for portfolios in which the current user is an owner.</p> <p data-bbox="443 461 1482 539">My Portfolios Financial Trends: This view shows the trend line of accumulated costs for portfolios in which the current user is an owner.</p> <p data-bbox="443 573 1482 685">Applications in My Portfolios Failing SLAs: This view shows the list of applications that failed SLAs at level 4 and 5. The view displays only the applications that are in portfolios in which the current user is an owner.</p> <p data-bbox="443 719 1482 842">Lifecycle Distribution of Application in My Portfolio: This statistic view shows the number of applications distributed by application state. The view displays only the applications that are in portfolios where the current user is an owner.</p> <p data-bbox="443 875 1482 1032">Active Application Alignment to Objectives: This view shows the distribution of active applications across the strategic objectives. The view displays only the strategic objectives that are related to applications in portfolios where the current user is an owner.</p> <p data-bbox="443 1066 919 1099">MANAGE-THE-ASSESSMENT-PROCESS</p> <p data-bbox="443 1133 1482 1290"># Applications in My Portfolios per Investment Category: This statistic view shows the number of applications distributed by investment category. The view displays only the active applications that are in portfolios where the current user is an owner.</p> <p data-bbox="443 1323 1482 1570">Investment Distribution for My Portfolio: This static view compares the targeted funding for next year with the projected annual cost for the current year. The view also compares the calculated funding for next year based on the investment model, and the funding for next year that the application owner proposed. The portfolio analyst uses this view to decide the proposed investment level for next year.</p> <p data-bbox="443 1603 1482 1760">Investment Ration of Applications in My Portfolios: This statistic view shows the number of applications distributed by start rating score. The view displays only the active applications that are in portfolios where the current user is an owner.</p> <p data-bbox="443 1794 1482 1962">Application Assessment Status of Applications in My Portfolios: This statistic view shows the number of applications distributed by assessment state. The view displays only the active applications that are in portfolios where the current user is an owner.</p> <p data-bbox="443 1995 1482 2074">Application Requiring My Actions: This view shows the list of applications for which the portfolio analyst must validate assessment data.</p> <p data-bbox="443 2107 1482 2217"># of Applications in My Portfolios by Proposed Disposition: This statistic view shows the number of applications distributed by recommended disposition methods. The view displays only the active applications in portfolios where the</p>

Roles	Home page windows
<i>Project management office (PMO)</i>	<hr/> <p data-bbox="448 286 868 309">MANAGE-THE-TRANSFORMATION</p> <p data-bbox="448 353 1461 421">Business Unit Financials: This view shows the trend line of aggregated costs for projects.</p> <p data-bbox="448 465 1461 533">Project Lifecycle Distribution: This statistic view shows the number of all of the projects distributed by project state.</p> <p data-bbox="448 577 1461 640">Project Alignment to Objectives: This view shows the distribution of all of the projects across the strategic objectives.</p> <hr/>

Roles	Home page windows
<i>Steering committee</i>	<p data-bbox="448 286 775 313">MANAGE-THE-PORTFOLIO</p> <p data-bbox="448 353 1461 427">Portfolios Summary: This view shows a summary of the information about all of the portfolios, including financials information.</p> <p data-bbox="448 465 1461 539">Financial Trends: This view shows the trend line of the accumulated costs of all of the portfolios over time.</p> <p data-bbox="448 577 1461 651">Application Failing SLAs: This view shows the list of all of the applications that failed SLAs at level 4 and 5.</p> <p data-bbox="448 689 1461 763">Application Lifecycle Distribution: This statistic view shows the number of all of the applications distributed by application state.</p> <p data-bbox="448 801 1461 875">Active Application Alignment to Objectives: This view shows the distribution of all of the active applications across strategic objectives.</p> <p data-bbox="448 913 919 940">MANAGE-THE-ASSESSMENT-PROCESS</p> <p data-bbox="448 981 1461 1099">Invest / Divest Strategy: This view shows the investment quartile chart. This chart represents the level of investment for all of the applications in your organization.</p> <p data-bbox="448 1137 1461 1368">Investment Distribution by Portfolio: This static view compares the targeted funding for next year with the projected annual cost for the current year. The view also compares the calculated funding for next year that is based on the investment model and the funding for next year that the application owner proposed. The steering committee uses this view to decide the proposed investment level for next year</p> <p data-bbox="448 1406 1461 1480"># Applications per Investment Category: This statistic view shows the number of active applications distributed by investment category.</p> <p data-bbox="448 1518 1461 1592">Investment Rating: This statistic view shows the number of active applications distributed by start rating score.</p> <p data-bbox="448 1630 1461 1704">Application Assessment Status: This statistic view shows the number of all of the applications distributed by assessment state.</p> <p data-bbox="448 1742 1461 1816"># of Applications by Proposed Disposition: This statistic view shows the number of all of the applications distributed by recommended disposition methods.</p> <p data-bbox="448 1854 871 1881">MANAGE-THE-TRANSFORMATION</p> <p data-bbox="448 1921 1461 1995">Business Unit Financials: This view shows the trend line of aggregated costs for projects.</p> <p data-bbox="448 2033 1461 2107">Project Lifecycle Distribution: This statistic view shows the number of all of the projects distributed by project state.</p> <p data-bbox="448 2145 1461 2219">Project Alignment to Objectives: This view shows the distribution of all of the projects across strategic objectives.</p>

Views in the application portfolio management workspace

The application portfolio management workspace has predefined views that are based on roles. The views are divided into folders that reflect the roles in the Members view. Members of a given Members folder can access the views for that role.

The views for each role are grouped into subfolders. The subfolders reflect the navigation menu, the General Access and Configuration views to support linking and calculations, the Criteria views to use for visualizations, and the Home Page views.

The roles for entry level demo and demo are not included in this section because the views for those roles are typically not customized, but removed before production usage.

All member views

The following table contains the views that all members can access.

Subfolder	View name	Description
Add views	Application	Adds a new application.
	Project	Adds a new project proposal.
Display views	Applications	Shows all applications. This view can be filtered to show the business scorecard, technical scorecard, and active application only. This view is read-only.
	Projects I submitted	Shows all of the projects that the current user has submitted. This view is read-only except for comments.
	Portfolios	Shows all portfolios. This view is read-only.

Application business owner and application architect views

The following table includes the views that the application business owner and application architect roles can access.

Subfolder	View name	Description
Add views	Application Bulk Loading	Adds many applications by spreadsheet import.

Subfolder	View name	Description
Display views	My Applications	<p>Shows all of the applications where the current user is the Application Business Owner or the Application Architect.</p> <p>This view has filters for both business and technical attributes to show this information:</p> <ul style="list-style-type: none"> Applications requiring Assessment Applications requiring Investment Assessment Applications requiring Investigation <p>Both business and technical attributes can be changed in this view, including financials.</p> <p>This view uses the Assessment State workflow.</p>
	Application Roadmap	<p>Shows a road map of applications over time. This view includes all states except retired and rejected. The view can be filtered to show My Applications, which are applications where the current user is either the application business owner or the application architect. The view is read-only except for risks, issues, and comments.</p>
	Project Roadmap	<p>Shows a road map of accepted and implementing projects over time. This view can be filtered to show submitted projects that are related to My Applications. The view can also be filtered to show submitted projects that are related to Projects I submitted.. This view is read-only except for comments.</p>

Enterprise architect views

In addition to the views that all members can see, the enterprise architect can access the views that are in the following table.

Subfolder	View name	Description
Display views	Applications under Investigation	Contains applications that are in the Investigation state. The disposition, rationale, decommission date, risks, issues, and comments are editable.
	Application Roadmap	Shows a road map of applications over time. This view is read-only except for risks, issues, and comments.
	Project Roadmap	Shows a road map of accepted and implementing projects over time. This view can be filtered to show My Applications and Projects I submitted. This view is read-only except for comments.

Portfolio analyst views

In addition to the views that all members can see, the portfolio analyst can access the views that are in the following table.

Subfolder	View name	Description
Add views	Portfolio	Adds a new portfolio.
	Application Bulk Loading	Adds many applications by spreadsheet import.
	Strategic Objective	Adds new a strategic objective, or criterion.
Display views	My Portfolios	Shows all portfolios where the current user is responsible. This view is read/write.
	Applications in My Portfolios	Shows all applications that belong to portfolios where the current user is responsible. This view can be filtered to show the assessment required and the investigation required. This view uses the Assessment State workflow. In this view, applications are changed to the Assess state to start the assessment process. Some attributes, such as owner, assessment state, and strategy, are read/write.

Subfolder	View name	Description
Display views	Applications for My Action	Shows applications from current user's portfolio that are in the Info Gathered and Investigation Done states so that the analyst can validate the information and transition to the applications to the Ready to Review state. This view uses Assessment State workflow. This view can be filtered to show Initial info gathered, Investigation done, and Investment review. This view is read-only except for assessment state, proposed investment change, risks, issues, and comments. To sum new projected costs and investment change percentages, you can use the Statistic view for investment analysis.
	Application Roadmap	Shows a road map of applications over time. Includes all states except retired and rejected. This view can be filtered to show Applications in My Portfolios. This view is read-only except for risks, issues, and comments.
	Project Roadmap	Shows a road map of the accepted and implementing projects over time. This view can be filtered to show Applications in My Portfolio and Projects I submitted. This view is read-only except for comments.
	Strategic Objective	Displays all of the criteria under the Strategic Objectives folder. The Title, Description, Weight and Objective attributes are editable.
	Calculation Weightings	Displays the weightings that are used in the various calculations. This view is read/write.
	Investment Quartile Image	Shows the image of the investment quartile for update.
Visualize Only Views	Strategic Objectives	Displays the results of business objective prioritization. Except for the priority values, this view is read/write.

Project management office views

In addition to the views that all members can see, the project management office (PMO) role can access the views in the following table.

Subfolder	View name	Description
Add views	Business Unit	Adds a new business unit.
Display views	Business Units	Shows all of the business units for an update. This view is read/write.
	My Projects to Detail	Shows the proposed projects where the current user is the owner, so that the owner can provide the necessary details and business case. This view is read/write and uses the Project State workflow.
	Projects to be Implemented	Shows all of the projects that the steering committee accepted and that must be implemented. The PMO can complete additional planning and transition to the Implementing state. This view can be filtered to show My projects. This view uses the Project State workflow. For implementation-related attributes, such as start and end dates, this view is read/write.
	Projects in Implementation	Shows all of the projects that are being executed. This view can be filtered to show My projects. This view uses the Project State workflow. The view is partially read/write so that start and end dates, financials, and other information can be updated. Projects in this view are eventually transitioned to the Delivered state.
	Project Roadmap	Shows a road map of accepted and implementing projects over time. This view can be filtered to show My Projects and Implementing projects only. This view is read-only except for comments and start, end, and benefits dates.
	Application Roadmap	Shows a road map of applications over time. This view includes all states except retired and rejected. The view is read-only except for risks, issues, and comments.

Steering committee views

In addition to the views that all members can access, the steering committee can access the views that are in the following table.

Subfolder	View name	Description
Add views	Portfolio	Adds a new portfolio.
	Strategic Objective	Adds a new strategic objective, or criterion.
Display views	Portfolio Investment	Shows all of the portfolios, including the targets for investment change and proposed investment change level attributes. This view can be filtered to show the financial information of the portfolio only.
Display views	Investment Analysis	Shows all of the active applications that are ready for assessment or investigation review, specifically in respect to investment change and supporting scores. You can apply the Scorecard filter in the table display format to show a scorecard that is related to investment analysis. Use the statistics display format to summarize percentages and annual costs. This view uses the Assessment State workflow. States, proposed investment changes, ratings, and classifications are editable.
	Application Roadmap	Shows a road map of applications over time. This view includes all states except retired and rejected. This view can be filtered to show Active applications, Ready for review, and Ready for Review 2. This view is read-only except for risks, issues, and comments.
	Project Roadmap	Shows a road map of proposed, accepted, and implementing projects over time. This view can be filtered to show Accepted and Implementing projects, New projects, and Alternative-groups. This view uses the Project State workflow. Dates and comments are editable.
	Projects	Shows all of the projects that are not rejected or proposed. This view can be filtered to show Accepted and Implementing and Delivered projects. This view is read-only except for risks and comments.

Subfolder	View name	Description
Prioritize/Visualize Views	Strategic Objectives	Prioritizes and visualizes strategic objective criteria based on which objective is higher priority. This view is read/write.
Visualize only views	Investment Assessment	Shows a visualization of the values for attributes and scores that support investment change in applications that are ready for initial or second review. The steering committee uses this view to make decisions about proposed investment change and the assessment state.
	Application Improvement Potential	Shows a visualization of the values for attributes and scores to support the initial assessment of applications that are ready to review. Data in this view supports decisions about which applications to investigate further. In this view, applications can be transitioned to the Assessment State.
	Application Deep Investigation	Shows a visualization of the values for attributes and scores to support the review of investigation and proposed disposition of applications that are ready for second review. Data in this view supports decisions about application disposition, such as retirement and modernization. In this view, applications can be transitioned to the Assessment State and possibly to the application lifecycle state.
	Project Assessment	Shows a visualization of the values for attributes that are related to project business cases. The information in this view can support accept or reject decisions. In this view, the Project state can be transitioned accordingly, primarily to accept or reject.
	Project Bubblechart	Shows a visualization of the values for attributes that are related to project business cases in an x/y chart. The information in this view can support accept or reject decisions. In this view, the Project state can be transitioned accordingly, primarily to accept or reject.

Administrator views

The administrator role also has specific views, primarily to facilitate workspace and demo customization.

Subfolder	View name	Description
Add views	Risk	Adds a risk that is related to the workspace
Display views	Change roles	Administrators can use this view to assume a different user role and see the views and filters for that role. This view is used in workspace and view development. To assume a user role, drag your user name to the desired role folder.
	Risks	Shows all risks.
	Applications (r/w)	Shows all of the applications. In this view, all application attributes are read/write. Use this view for development and to update sample data. For production use, delete this view.
	Projects (r/w)	Shows all of the projects. In this view, all application attributes are read/write. Use this view for development and to update sample data. For production use, delete this view.
	Portfolios (r/w)	Shows all of the portfolios. In this view, all portfolio attributes are read/write. Use this view for development and to update sample data. For production use, delete this view.

Adding new views

In addition to the predefined views, you can add new views that are based on roles. Before you add a view, determine the roles that can access the view. Consider which attributes are visible to and editable by the roles. If the requirements differ by role, you might need to define different views.

If the view is accessed by all members, create the view in the appropriate subfolder in the **All Members/System Views** folder.

If the view is accessed by only one role, create the view in the subfolder for that role.

If the view is accessed by more than one role, but not all members, create a view for each role and place the views in the corresponding subfolders.

If the view is accessed by only certain people, create a folder in the view structure for Views Assigned to Individuals. Create a view for each person and place the views in the new folder. To track work more easily, avoid assigning views to individuals and assign views to roles instead.

If you place a view in a folder under a role, members with that role can automatically access the view. This process is a best practice. If you create a different folder hierarchy, you must click the **Share View** button to assign the view to a role (member folder) or individual users. Then, click the **Delete from My Own Views** button so that you inherit the view based on your role, not based on the fact that you created the view.

Customizing calculated scorecards

The application module contains attributes that calculate qualitative scores that are based on the data provided by other attributes. The scores are used for three main purposes:

Scorecards for first-level assessments:

- **Total business alignment score:** This score is calculated based on the weighted values for the Business Alignment, Business Criticality, and Business Risk attributes. Weights are assigned in the Weights module.
- **Total IT alignment score:** This score is calculated from the weighted values for the IT alignment and IT risk attributes.

Scorecards for deep investigations:

- **Deep business value score:** This score is calculated from seven application attribute values that are assigned during the investigation stage. The score is analogous to the total business alignment score, but the deep business value score considers more attributes.
- **Deep IT score:** This score is calculated based on eight application attribute values that are assigned during the investigation stage. It is analogous to the total IT alignment score, but considers more attributes.

Scorecards for investment management:

- **Business efficiency score:** This value indicates the business effectiveness of the application. The purpose of this score is to assess what this application is doing for the business today.
- **Ability for growth score:** This value indicates the potential of an application to grow the company in the future and the technical or business factors that might prevent growth.

Each attribute that is used in a score calculation is weighted based on the values that are entered in the Weights module. The score calculation is self-calibrating to provide a score between 0 and 100, regardless of the values of the weights.

For more guidance about how scorecards are used, see the Assess applications and determine application dispositions section in the User Guide for the application portfolio management workspace.

Scorecards for high-level assessments

The purpose of these scores is to enable a high-level assessment through the collection of a minimum set of qualitative data. You can use scorecards to identify the applications that require

a deeper investigation, at which stage the organization can invest to collect more attributes about the data.

These calculated score values might be too simple for your purposes. Your organization might need to add attributes to the scores, or additional score attributes.

Total business alignment score

The total business alignment score is the sum of the weighted business criticality score, the weighted business alignment score, and the weighted business risk score:

- The total business alignment score represents the rating of business value versus business risk.
- The business criticality score represents how critical the application is to running the business.
- The business alignment score represents how well the application aligns with business needs.
- The business risk score represents how much business risk the application poses to business.

The total business alignment attributes have the following predefined weights:

- Business criticality weight: 3
- Business alignment weight: 3
- Business risk weight: 1
- Minimum weight: 7. This value is calculated and is used to calibrate the scorecard to always be 0 – 100.
- Maximum weight: 28. This value is calculated and is used to calibrate the scorecard to always be 0 – 100.

You can adjust these weights based on the priorities of your organization. Alternatively, you can add new business score attributes into the formula.

The next image shows the formula and weights that are used for the total business alignment score. The yellow box contains instructions to modify the formula and weights.

Calculating Total Business Alignment Score

Formula and weights

Modules

- Portfolios
- Applications
- Opportunities
- Projects
- Criteria
- Weights**
- Images
- Risks

To update the score card

1. If you want to include additional attributes in formula
 - a. Translate attribute to numeric value using "M-<name>" attribute
 - b. Add attribute weight to Weight module
 - c. Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - d. Update formula for the score card attribute in the application module to include the new attribute. Remember to do (<max value +1> - <attribute>) in cases where scale for attribute has 1 as best value.)
2. Change weights in weight module.

Note: Setting weight to 0 is the same as removing an attribute.

Total Business Alignment Attribute Weights	
BW-BusAlign	3
BW-BusCrit	3
BW-BusRisk	1
BW-MIN	7
BW-MAX	28

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

Total Business Alignment Score=
 =Round(((Weights!W1!BW-BusAlign * 'M-BusAlign') +
 (Weights!W1!BW-BusCrit * 'M-BusCrit') +
 (Weights!W1!BW-BusRisk * (6 - 'M-BusRisk')) -
 'Weights!W1!BW-MIN') * 100 / 'Weights!W1!BW-MAX')

Used to calibrate so always a score 0-100

The MIN weight is the minimum possible score for the total business alignment. The MAX weight is the maximum possible score for the total business alignment. The MIN weight is calculated by assuming that the business criticality, business alignment, and business risk scores are set to the minimum value of 1. The MAX weight is calculated by assuming that the business criticality, business alignment, and business risk scores are set to maximum value of 5. These two weights calibrate the total business alignment score to be value between 0 and 100.

The next image describes how the MIN and MAX parameters work and how the formula compensates for the direction of "goodness" for attributes in the scorecard. The direction of "goodness," indicates whether a number has good or bad implications. For example, for business criticality (M-BusCrit), 1 represents low business criticality, which is bad. The number 5 represents high business criticality, which is good. For business risk (M-BusRisk), 1 represents low business risk, which is good, and 5 represents high business risk, which is bad.

Calculating Total Business Alignment Score Min, Max, and Compensate for direction of 'goodness'

$$BW-MIN = 'BW-BusAlign' + 'BW-BusCrit' + 'BW-BusRisk'$$

NOTE: This is the minimal value that you can get if you sum up the lowest value of each attribute multiplied by its weight.

Total Business Alignment Attribute Weights

BW-BusAlign	3
BW-BusCrit	3
BW-BusRisk	1
BW-MIN	7
BW-MAX	28

Total Business Alignment Score=

$$=Round(((Weights!W1!BW-BusAlign * 'M-BusAlign') + (Weights!W1!BW-BusCrit * 'M-BusCrit') + (Weights!W1!BW-BusRisk * (6 - 'M-BusRisk')) - (Weights!W1!BW-MIN) * 100 / 'Weights!W1!BW-MAX')$$

For M-BusAlign and M-BusCrit, a value of 1 is the lowest and should generate a low score, and a value of 5 is the highest and should generate a high score.
 For M-BusRisk, the scale is turned around. A risk score of 1 is best, and 5 is worst. We hence multiply the weight with (6 - 'M-BusRisk').

$$BW-MAX = ('BW-BusAlign' * 5) + ('BW-BusCrit' * 5) + ('BW-BusRisk' * 5) - ('BW-MIN')$$

NOTE: This is the maximum value that you can get if you sum up the highest value of each attribute multiplied by its weight, and then subtract the MIN value. Note: "5" is the max value for each of the 3 attributes used in the score card.



Total IT alignment score

The total IT alignment score is the sum of the weighted IT alignment score and the weighted IT risk score. The total IT alignment represents the rating of how well an application aligns with target IT strategies versus risk. The IT alignment score represents how well the application aligns with target IT requirements and technologies. The IT risk represents how much risk the application poses to IT success.

The total IT alignment attributes have the following predefined weights:

- IT alignment weight; 1
- IT risk weight: 1
- Minimum weight: 2. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.
- Maximum weight: 8. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.

You can adjust these weights based on their priority in your organization. Alternatively, you can add new IT score attributes into the formula. The next image shows the formulas and weights that are used for the scorecards. The yellow box contains instructions to modify the formula and weights.

Calculating Total IT Alignment Score

Formula and weights

To update the score card

1. If you want to include additional attributes in formula
 - a. Translate attribute to numeric value using "M-<name>" attribute
 - b. Add attribute weight to Weight module
 - c. Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - d. Update formula for the score card attribute in the application module to include the new attribute. Remember to do (<max value +1> - <attribute>) in cases where scale for attribute has 1 as best value.)
2. Change weights in weight module.
 Note: Setting weight to 0 is the same as removing an attribute.

Modules

- Portfolios
- Applications
- Opportunities
- Projects
- Criteria
- Weights**
- Images
- Risks

Total IT Alignment Attribute Weights

TW-Align	1
TW-Risk	1
TW-MIN	2
TW-MAX	8

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

Total IT Alignment Score=
 =Round(((Weights!W1!TW-Align' * 'M-IT-Align') +
 ('Weights!W1!TW-Risk' * (6 - 'M-IT-Risk')) -
 'Weights!W1!TW-MIN') * 100 / 'Weights!W1!TW-MAX')

Used to calibrate so always a score 0-100

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For information about the MIN and MAX parameters and how the formula compensates for the direction of "goodness" for the attributes in the scorecard, see *'Total business alignment score' on page 39*.

Scorecards for deep investigations

Typically, after an initial assessment of a broad set of applications, you flag a subset of those applications for further investigation. For those applications, you spend more time collecting and analyzing a wider set of data. You can use several calculated score attributes to assist with deeper analysis. These score attributes are like the attributes that are used for high-level analysis, but the attributes for deeper analysis incorporate more information by including a larger set of attributes in the calculations.

Deep business value score

The deep business value score represents the business value versus the business risk of an application. The deep business value score is the sum of the following scores:

- Weighted business criticality score (how critical is the application to the business?)
- Weighted business alignment score (how well does the application align with the business?)
- Weighted business risk score (what is the business risk associated with this application not delivering on SLAs and functional needs?)
- Weighted user base score (how many users are using the application?)
- Weighted revenue generating score (how strongly does the application contribute to revenue generation?)

- Weighted customer facing score (is the application customer facing?)
- Weighted revenue growth potential score (what ability does the application have to contribute to future revenue growth?)

In the deep business value score, the user base score represents the number of active users of the application. The revenue generating score represents how strongly the application contributes to revenue generation. The customer facing score captures whether the application is customer facing or not. The revenue growth potential represents the extent of the ability of the application to contribute to revenue growth.

The deep business value attributes (have the following predefined weights:

- Business alignment weight: 3
- Business criticality weight: 1
- Business risk weight: 1
- User base weight: 1
- Revenue generation weight: 1
- Revenue growth weight: 3
- Customer facing weight: 3
- Minimum weight: 13. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.
- Maximum weight: 52. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.

You can adjust these weights based on the priorities of your organization. Alternatively, you can add new deep business score attributes into the formula. The next image shows the formulas and weights that are used for the scorecards. The yellow box contains the instructions to modify the formula and weights.

Calculating Deep Business Value Formula and weights

Attribute	Weight
BAW-BusAlign	3
BAW-BusCrit	1
BAW-BusRisk	1
BAW-UserBase	1
BAW-RevGen	1
BAW-RevGrowth	3
BAW-CustFacing	3
BAW-MIN	13
BAW-MAX	52

To update the score card

- If you want to include additional attributes in formula
 - Translate attribute to numeric value using "M-<name>" attribute
 - Add attribute weight to Weight module
 - Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - Update formula for the score card attribute in the application module to include the new attribute. (Remember to do <max value +1> - <attribute> in cases where scale for attribute has 1 as best value.)
- Change weights in weight module.
 Note: Setting weight to 0 is the same as removing an attribute.

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

```

        Deep Business Value Score=
        =Round((('Weights!W1!BAW-BusAlign' * 'M-BusAlign') +
        ('Weights!W1!BAW-BusCrit' * 'M-BusCrit') +
        ('Weights!W1!BAW-BusRisk' * (6 - 'M-BusRisk')) +
        ('Weights!W1!BAW-UserBase' * 'M-UserBase') +
        ('Weights!W1!BAW-RevGen' * 'M-RevGen') +
        ('Weights!W1!BAW-RevGrowth' * 'M-RevGrowth') +
        ('Weights!W1!BAW-CustFacing' * 'M-CustFacing') -
        'Weights!W1!BAW-MIN') * 100 / 'Weights!W1!BAW-MAX')
    
```

For information about the MIN and MAX parameters and how the formula compensates for the direction of "goodness" for the attributes in the scorecard, see *'Total business alignment score' on page 39*.

Deep IT score

The deep IT score represents the IT performance of an application. The deep IT score is a sum of the following scores:

- IT alignment score (how well is the application aligned with the IT strategy and technology stack?)
- IT risk score (how much risk does the application pose to IT success?)
- Defect density (number of defects divided by application size)
- Dependency factor score (if the application has an issue, how many applications are impacted and how seriously?)
- SLA compliance score (to what extent is the application meeting agreed SLAs?)
- Skills risk score (what is the risk of not having the critical skills necessary for evolving the application?)
- Code complexity score (how complex is the application code? Assessed by using the Application Analytics tool)
- Maintainability score (how easy is it to maintain the application?)

For an explanation about the IT alignment and IT risk scores, see *'Total IT alignment score' on page 41*.

In the deep IT score, the defect density is calculated by dividing the number of defects for the application by the application size. The dependency factor represents the level of upstream dependencies. That factor indicates how strong the impact is if the application has an issue or is removed. The SLA compliance score represents how well this application meets its service level agreements (SLAs).

The skills risk score indicates the magnitude of the risk that is associated with skills and resources. High risk means that critical skills are lacking or likely to be lost in the near future.

The code complexity indicates the complexity of the code that is written for an application. Typically, this score can be produced by an application analytics tool. The maintainability score represents the rating of how easy it is to maintain the application.

The deep IT attributes have the following predefined weights:

- IT alignment weight: 1
- IT risk weight: 1
- Defect density weight: 0. The defect density attribute does not impact the deep IT score.
- Dependency factor weight: 1
- SLA compliance weight: 1
- Skills risk weight: 3
- Code complexity weight: 0. The code complexity attribute does not impact the deep IT score.
- Maintainability weight: 3
- Minimum weight: 10. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.
- Maximum weight: 37. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.

You can adjust these weights based on the priorities of your organization. Alternatively, you can add new IT score attributes into the formula. The next image shows the formulas and weights that are used for the scorecards. The yellow box contains the instructions to modify the formula and weights.

Calculating Deep IT Formula and weights

Modules

- Portfolios
- Applications
- Opportunities
- Projects
- Criteria
- Weights**
- Images
- Risks

Deep IT Attribute Weights

TAW-Align	1
TAW-Risk	1
TAW-DefDens	0
TAW-DepFact	1
TAW-SLA	1
TAW-SkillRisk	3
TAW-Complexity	0
TAW-Maintainability	3
TAW-MIN	10
TAW-MAX	37

To update the score card

- If you want to include additional attributes in formula
 - Translate attribute to numeric value using "M-<name>" attribute
 - Add attribute weight to Weight module
 - Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - Update formula for the score card attribute in the application module to include the new attribute. (Remember to do <max value +1> - <attribute> in cases where scale for attribute has 1 as best value.)
- Change weights in weight module.
 Note: Setting weight to 0 is the same as removing an attribute.

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

Deep IT Score=

$$=Round(('Weights!W1!TAW-Align' * 'M-IT-Align') + ('Weights!W1!TAW-Risk' * (6-'M-IT-Risk')) + ('Weights!W1!TAW-DepFact' * (6-'M-DepFact')) + ('Weights!W1!TAW-SLA' * (6-'M-SLA')) + ('Weights!W1!TAW-SkillRisk' * (6-'M-SkillRisk')) + ('Weights!W1!TAW-Complexity' * 'M-Complexity') + ('Weights!W1!TAW-Maintainability' * 'M-Maintainability') - 'Weights!W1!TAW-MIN') *100 / 'Weights!W1!TAW-MAX')$$

Used to calibrate so always a score 0-100

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For information about the MIN and MAX parameters and how the formula compensates for the direction of "goodness" for the attributes that are used in the scorecard, see *Total business alignment score' on page 39.*

Scorecards for investment management

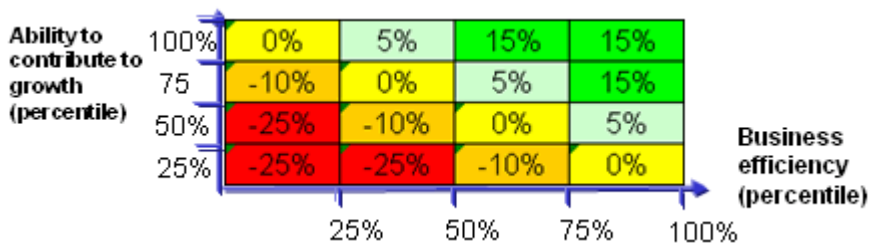
To determine the right investment level, an organization needs a transparent process with clearly defined guidelines to prioritize investments. A company must determine the best guidelines for itself.

In the workspace, two scorecards are used to determine investment levels:

The business efficiency score indicates the current value of an application.

The ability for growth score indicates the potential that the application has for business.

By viewing these scores on an x/y axis, you can target the level of investment based on where the application falls on the grid. In the following example, the guideline is to increase investments by 15% for applications that score in the top quartile for both score attributes, and to reduce spending by 25% for applications that are in the bottom quartile for attributes.



Note Investment decisions cannot be based on mathematical formulas alone. The calculated investment level is only a proposal. A separate, manually set attribute represents the actual investment level that is proposed by weighing other factors outside the scope of the scorecards. Those other factors include additional business insight and special circumstances.

The application portfolio management workspace template provides a generic approach to investment management. Organizations can customize this approach in three ways to meet their specific needs:

- Modify the attributes that are included to calculate each of the two main scorecards, which are the business efficiency score and the ability for growth score. The instructions to customize these attributes are in the next two sections of this guide.
- Modify the weights for each of those attributes as scores are calculated for each of the scorecards. This process is described in the “Update Weights Contributed to Business Efficiency and Ability to Contribute to Growth” use case in “Section 4 - Manage the Investment Model” of the User Guide.
- Modify the target investment level based on the score for each of the scorecards. This process is described in the “Determine Appropriate Investment Levels” use case in “Section 4 – Manage the Investment Model” of the workspace User Guide.

Business efficiency score

The business efficiency score indicates how efficiently an application contributes to business strategies. The business efficiency score is a sum of the following scores:

- Business criticality score (how critical is the application to the business?)
- User base score (how many users are using the application?)
- Revenue generating score (how strongly does the application contribute to revenue generation?)
- Customer facing score (is the application customer-facing?)
- SLA compliance score (to what extent is the application meeting agreed SLAs?)

Explanations of these scores are in earlier sections of this document.

The business efficiency attributes have the following predefined weights:

- Business criticality weight: 3
- User base weight: 1
- Revenue generation weight: 2
- Customer facing weight: 2
- SLA compliance weight: 3
- Minimum weight: 11. This value is calculated and is used to calibrate the scorecard to always be 0 – 100.

- Maximum weight: 44. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.

You can adjust these weights based on their priority in your organization. Alternatively, you can add a new business score attribute into the formula. The next image shows the formulas and weights that are used for the scorecards. The yellow box contains the instructions to modify the formula and weights.

Calculating Business Efficiency Formula and weights

Modules

- Portfolios
- Applications
- Opportunities
- Projects
- Criteria
- Weights
- Images
- Risks

Business Efficiency Weights	
BE-BusCrit	3
BE-UserBase	1
BE-RevGen	2
BE-CustFacing	2
BE-SLA	3
BE-MIN	11
BE-MAX	44

To update the score card

1. If you want to include additional attributes in formula
 - a. Translate attribute to numeric value using "M-<name>" attribute
 - b. Add attribute weight to Weight module
 - c. Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - d. Update formula for the score card attribute in the application module to include the new attribute. (Remember to do <max value +1> - <attribute> in cases where scale for attribute has 1 as best value.)
2. Change weights in weight module.
 Note: Setting weight to 0 is the same as removing an attribute.

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

Deep Business Value Score=

$$=Round(((Weights!W1!BE-BusCrit * 'M-BusCrit') + (Weights!W1!BE-UserBase * 'M-UserBase') + (Weights!W1!BE-RevGen * 'M-RevGen') + (Weights!W1!BE-CustFacing * 'M-CustFacing') + (Weights!W1!BE-SLA * (6 - 'M-SLA')) - Weights!W1!BE-MIN) * 100 / Weights!W1!BE-MAX)$$

Used to calibrate so always a score 0-100

For information about the MIN and MAX parameters and how the formula compensates for the direction of "goodness" for the attributes in the scorecard, see *'Total business alignment score' on page 39*.

Ability for growth score

The ability for growth score captures the ability of the application to have a positive impact on the growth and strategic initiatives of the company. The ability for growth score is a sum of the following scores:

- Business alignment score (how well does the application align with the business?)
- Revenue growth potential score (what ability does the application have to contribute to future revenue growth?)
- Business risk score (what is the business risk that is associated with the application not delivering on SLAs and functional needs?)
- IT alignment score (how well is the application aligned with the IT strategy and technology stack?)
- Maintainability score (how easy is the application to maintain?)
- Skills risk score (what is the risk of not having the critical skills to evolve the application?)

Explanations of these scores are available in earlier sections of this document. The ability for growth attributes have the following predefined weights:

- Business alignment weight: 2
- Revenue growth potential weight: 4
- Business risk weight: 1
- IT alignment weight: 1
- Maintainability weight: 2
- Skills risk weight: 2
- Minimum weight: 12. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.
- Maximum weight: 46. This value is calculated and is used to calibrate the scorecard to always be 0 - 100.

You can adjust these weights based on the priorities of your organization. Alternatively, you can add a new IT score attribute into the formula. The next image shows the formulas and weights that are used for the scorecards. The yellow box contains the instructions to modify the formula and weights.

Calculating Ability for Growth Formula and weights

Modules

- Portfolios
- Applications
- Opportunities
- Projects
- Criteria
- Weights
- Images
- Risks

Ability for Growth Weights	
GRO-BusAlign	2
GRO-RevGrowth	4
GRO-BusRisk	1
GRO-ITAlign	1
GRO-Maintainability	2
GRO-SkillRisk	2
GRO-Min	12
GRO-MAX	46

To update the score card

1. If you want to include additional attributes in formula
 - a. Translate attribute to numeric value using "M-<name>" attribute
 - b. Add attribute weight to Weight module
 - c. Update MIN and MAX variables in the Weight module to consider added attribute (see next slide)
 - d. Update formula for the score card attribute in the application module to include the new attribute. (Remember to do <max value +1> - <attribute> in cases where scale for attribute has 1 as best value.)
2. Change weights in weight module.

Note: Setting weight to 0 is the same as removing an attribute.

The variables "M-<name>" are used to convert a choice attribute to a float, so it can be used in a formula.

Ability for Growth Score=
 =Round(((Weights!W1!GRO-BusAlign * 'M-BusAlign') +
 ('Weights!W1!GRO-BusRisk' * (6 - 'M-BusRisk')) +
 ('Weights!W1!GRO-RevGrowth' * 'M-RevGrowth') +
 ('Weights!W1!GRO-ITAlign' * 'M-IT-Align') +
 ('Weights!W1!GRO-Maintainability' * 'M-Maintainability') +
 ('Weights!W1!GRO-SkillRisk' * (6 - 'M-SkillRisk')) -
 'Weights!W1!GRO-Min') * 100 / 'Weights!W1!GRO-MAX')

Used to calibrate so always a score 0-100

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For information about the MIN and MAX parameters and how the formula compensates for the direction of "goodness" for the attributes in the scorecard, see *Total business alignment score' on page 39.*



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