



Project and Portfolio Management Center

Software Version: 9.60-9.62

Application Portfolio Management Administrator

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Chapter 1: Getting Started with Application Portfolio Management

Application Portfolio Management (APM) is a tool that is used to assess your organization's current application portfolio and can help the organization to determine which applications need to be modernized.

APM enhances the functionality of PPM by providing predefined request types, data sources, workflows, validations, report types, users, and security groups.

Use APM to take the first step towards application transformation. Application transformation is the process of assessing (discovering, analyzing, making decisions about) and modernizing (keeping, changing, retiring) your organization's application portfolio.

If your current IT environment is made up of a bloated application portfolio, inflexible infrastructure, outdated applications, and/or inconsistent architecture, use APM to:

- Document the size of your portfolio and what applications support your business processes
- Compare and analyze application information (such as health, effectiveness, ownership, cost of ownership, business value, and risk)
- Identify improvement opportunities and make a strategic determination about the future of each application in the portfolio

There are two main consumers of APM: the analyst and the user. The analyst collects and analyzes data about an organization's application portfolio and also collects information about how the organization is structured. The user manages applications he owns, supplies information for applications when requested by the analyst, and can view consolidated data about the applications in the organization's application portfolio.

The Role of the APM Administrator

As an administrator, your goal is to enable the analyst to collect and consolidate data about applications. After installing APM, you may need to customize the PPM-supplied entities for the analyst so that the analyst can collect the information needed to make an accurate assessment about the application portfolio.

This document provides information about how to set up and maintain APM.

Setting Up APM

Use the following guidelines to set up APM such that the analyst can input and analyze data about an organization's application portfolio:

1. Install APM. See the *APM Release Notes* for more information.
2. Determine the type of information that will be collected.

- a. Ask the analyst about the type of information collected for applications and determine how the information maps to the existing application entity fields.
 - b. If necessary, customize the application entity by adding or modifying fields and validations such that all information collected for applications map to application entity fields.
3. Define users of APM.
 - a. Add users who are active users of APM that create and manage applications, respond to surveys or requests for more information, or use portlets to view application data.
 - b. Add users who serve as points of reference for other APM entities, such as business owners, technical owners, IT contacts, budget and benefits managers, subject matter experts, reviewers, respondents, resources, and sponsors.
 - c. Add analysts who collect and consolidate information about the organization and applications. This may include assigning additional access grants to allow the analyst to perform specific functions.
4. Monitor entities, ongoing application assessments, and other information about the application portfolio.

Chapter 2: Application Data Planning

Application data planning is working with the APM analyst to determine the type of data being collected about an application and how that data maps to the existing application entity fields. When necessary, you can modify existing application entity fields or create new application entity fields for the analyst.

You should also work with the analyst to collect data for users who will fulfill a role in the application analysis process. These are users who are active users of APM or serve as points of reference for other APM entities. Required data for users include a username, first name, last name, password, and user type (user, analyst, or administrator, to determine license requirements and the security groups to which the user belongs). You need to define and create these users in Project and Portfolio Management Center (PPM) before the APM user or analyst starts to add/import application data. See ["User Management and Security" on page 19](#) for more information.

Mapping Application Data to Application Entity Fields

Work with the analyst and determine the type of data being collected for applications. Map the data to the existing application entity fields. Existing application entity fields can be viewed from the application entity or you can use the PPM Data Migrator for Microsoft Excel (Data Migrator) to generate a Microsoft Excel spreadsheet that contains the existing application entity fields.

If all the data matches to existing application entity fields, you can skip to the next task of defining users of APM.

If some of the application data collected do not map to existing application entity fields, you can customize the existing entity by modifying existing field attributes or adding new fields to match the data being collected. If there are existing fields you do not wish to use, you may exclude them.

Customizing Application Entity Fields

Customize the application entity fields by:

- ["Modifying Existing Application Entity Fields Attributes" on the next page](#)
- ["Excluding Existing Application Entity Fields" on the next page](#)
- ["Adding New Application Entity Fields" on page 9](#)

The concepts for customizing application entity fields can be applied to other existing APM entities.

Modifying Existing Application Entity Fields Attributes

Some field attributes, when modified, do not require any additional setup in APM. You simply modify the field's attributes and continue to use the PPM-provided modules and portlets.

Existing field attributes, when modified, that do not require additional setup include:

- **Field Prompt.** The name of the field.
- **Display.** Determines if the field is visible on the application entity page.
- **Validation Values.** A specific list of acceptable input values for the field.

To update the Field Prompt or Display, modify the APM - Application request type or request header type. The section in the application entity in which the field appears determines if you need to modify the request type or request header type. Use "[Table 2-1. Location of editable fields](#)" below to determine if you need to modify the request type or request header type.

Table 2-1. Location of editable fields

Application Entity Section	Request Type	Request Header Type
Identity		✓
Contacts		✓
Business Environment		✓
Technical Environment	✓	
Budget & Resources		✓
Service & Support		✓
Usage & Scale	✓	
Rating	✓	
Score		✓

See *Demand Management User Guide* for more information about configuring request types and request header types.

To add, update, or delete Validation Values, modify the appropriate validation.

See *Commands, Tokens, and Validations Guide and Reference* for more information about configuring validation values.

Excluding Existing Application Entity Fields

There are three ways to exclude an existing application entity field:

- **Hide the existing field.** You can prevent the existing field from being displayed in the application entity. However, the field still exists and can be used in APM. This is the simplest way to remove an existing field because you only need to set the Display option for the field. See ["Modifying Existing Application Entity Fields Attributes" on the previous page](#) for more information.
- **Disable the existing field.** You can disable the existing field such that it cannot be used in APM. Set the Enabled option for the field. You must generate a new data source for the application entity and configure new portlet definitions to use the new data source. See ["Generating a Data Source" below](#) and ["Creating Portlet Definitions" on page 11](#) for more information.
- **Remove the existing field.** You can remove the existing field from the application entity by selecting the field in the request type or request header type and clicking **Remove**. You must generate a new data source for the application entity and configure new portlet definitions to use the new data source. See ["Generating a Data Source" below](#) and ["Creating Portlet Definitions" on page 11](#) for more information.

Adding New Application Entity Fields

Adding new fields to the application entity requires additional setup in APM. Customize the entity by:

- ["Adding a New Field to the APM - Application Entity" below](#)
- ["Generating a Data Source" below](#)
- ["Creating Portlet Definitions" on page 11](#)

Adding a New Field to the APM - Application Entity

The APM - Application entity is a predefined request type and request header type. To add a field to the application entity, follow the instructions for configuring a request type and request header type fields in the *Demand Management User Guide*. Use ["Table 2-1. Location of editable fields" on the previous page](#) to determine if you need to modify the request type or request header type.

Generating a Data Source

After you have customized the application entity (by adding, disabling, or removing fields), you must generate a new data source for this entity. Any time you update an entity's fields, you must generate or regenerate the data source. When you generate a new data source, you must create new portlet definitions that use this new data source.

1. Rename the existing data source of the application entity for which you are generating a data source:

Note: If you are generating a data source for the first time, you may skip this step (there

is no existing data source to rename).

- a. Select **Open > Administration > Open Workbench**.
 - b. From the shortcut bar, select **Dashboard > Data Sources**.
 The Data Source Workbench opens.
 - c. Click **List**.
 - d. Select the data source to rename and click **Open**.
 - e. Update the Data Source Name and click **OK**.
2. Go to `http<s>://<Host>:<Port>/itg/web/knta/apm/entity/default.jsp`.
 The Entity Query Tool page opens.
 3. From the Entity Query Tool page, enter the following information:

Field	Value Entered
Entity	The name of the entity for which you are generating the data source. For example, APM - Application . Or, use % to generate data sources for all entities.
Type	% (generates the data source for all types).
Include Attributes	Leave this field blank.
Include Data	Leave this field blank.
Operation	Select one of the following: <ul style="list-style-type: none"> • Generate Datasources. Generate a standard data source. • Generate Datasources (w/Filters). Generate a standard data source with filters. Filters are the preferences (filter fields) found on the edit page of a portlet. • Generate Datasources (w/Filters & Counts). Generate a standard data source with filters and counts. Filters are the preferences (filter fields) found on the edit page of a portlet. Counts allow you to show the quantity of entries in a multi-select field.

4. Click **Execute**.
5. A separate browser page opens and displays the results.

See *Creating Portlets and Modules* for more information about data sources.

Creating Portlet Definitions

After you generate the data source, you must create portlet definitions that use the data source (PPM-provided portlets do not use these new data sources and you cannot change an existing portlet's data source).

See *Creating Portlets and Modules* for more information about creating portlet definitions.

Configuring Roadmap

Generally, the roadmap configurations include the following :

- ["Setting Request Type as Roadmap Type" below](#)
- ["Defining Roadmap Hierarchy" on the next page](#)
- ["Defining Roadmap Phases and Milestones" on page 16](#)

Setting Request Type as Roadmap Type

Note: In APM for PPM 9.22, both Portfolio and Application are default roadmap types. As APM for PPM 9.31 uses different method to implement roadmap related functionality, only Portfolio is a default roadmap type. You have to configure the request type APM - Application to set it as the roadmap type.

To set a request type as the roadmap type:

1. Log on to PPM.
2. From the menu, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
The Request Type Workbench window opens.
4. Click **List** and then select the request type you want to set as the roadmap type.
The Request Type window opens to the **Fields** tab.
5. Click **New**.
The Field: New window opens to the Attributes tab.
6. In the **Token** field, type ROADMAP_TYPE.
7. Fill in the mandatory fields.
8. Provide values for the other fields as you desire.
For detailed instructions about creating fields for a request type, see the Creating Fields for Request Types section in the *Demand Management Configuration Guide*.
9. Click **Add** or **OK**.

Defining Roadmap Hierarchy

As an APM administrator, after setting an entity request type as a roadmap type, you need to define roadmap hierarchy for the roadmap type in either of the following two levels:

- ["Defining Roadmap Hierarchy in the Request Level" below](#)
- ["Defining Roadmap Hierarchy in the Portfolio Level" on page 15](#)

Defining Roadmap Hierarchy in the Request Level

As an APM administrator, you can use one of the following two ways to define the roadmap hierarchy in the request level:

- ["\(Recommended\) Using Token SUB_ROADMAP_ENTITY to Define Roadmap Hierarchy" below](#)
- ["Using APM_ROADMAP_ENTITY_HIERARCHY_V to Define Roadmap Hierarchy" on the next page](#)

(Recommended) Using Token SUB_ROADMAP_ENTITY to Define Roadmap Hierarchy

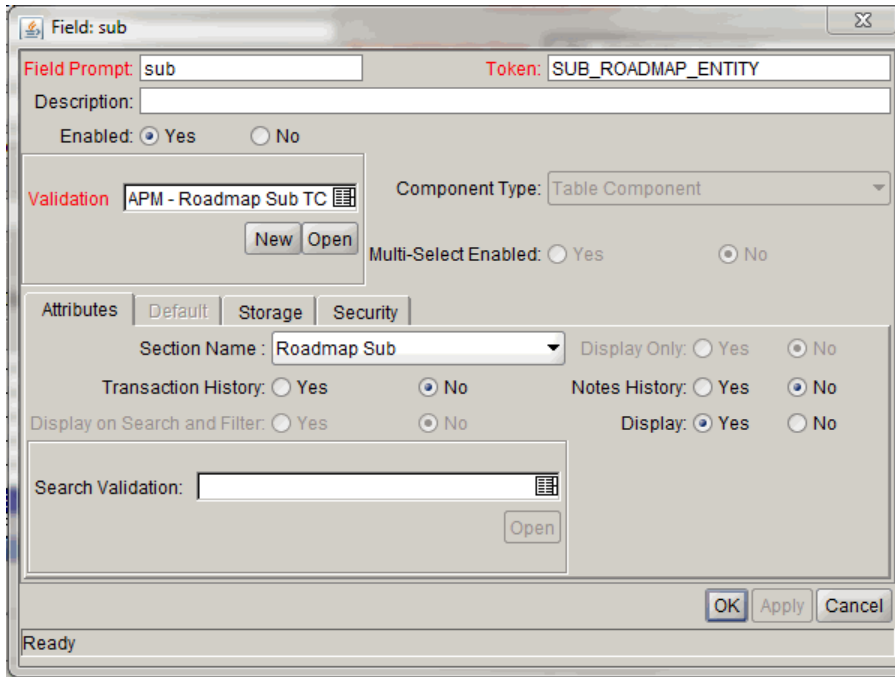
As an APM administrator, you can create a table component field using the token SUB_ROADMAP_ENTITY in a roadmap type, so that your users can enter child entities information in the table component field on the request detail page of the parent request.

For example, you can define a table component field in the roadmap type APM- Application, then your users can enter release or technology information on the entity detail page of the application.

The system fetches the child entities information from the table component field to generate the roadmap hierarchy in the **Roadmap** section of the request detail page, so that end users can view roadmap hierarchy from the request detail page of the parent request.

To create a table component field for a roadmap type using the token SUB_ROADMAP_ENTITY:

1. Log on to PPM.
2. From the menu, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
The Request Type Workbench window opens.
4. Click **List** and then select the desired entity request type that has been set as a roadmap type.
The Request Type window opens to the **Fields** tab.
5. Click **New**.
The Field: New window opens to the Attributes tab.



6. In the **Token** field, type SUB_ROADMAP_ENTITY.
7. In the **Validation** field, select a table component type validation.

For the selected validation, make sure that the column that stores the entity IDs selects PARAMETER1 in the Parameter Col field.

Note: You can decide which roadmap types can be added as sub-entities. If you do so, your end users can only enter request information of the specified roadmap types in the table component field. If you do not perform such configuration, your end users can add request information of any roadmap type in the field.

8. Provide values for the other fields as you desire.

For detailed instructions about creating fields for a request type, see the Creating Fields for Request Types section in the *Demand Management Configuration Guide*.

9. Click **Add** or **OK**.

Using APM_ROADMAP_ENTITY_HIERARCHY_V to Define Roadmap Hierarchy

You can also define your own roadmap structure by using the database view APM_ROADMAP_ENTITY_HIERARCHY_V.

The following describes the definition of this view.

Foreign Keys

Primary Key Table	Primary Key Column	Foreign Key Column
APM_ROADMAP_ENTITY_HIERARCHY_V	ENTITY_ID	PARENT_ID
APM_ROADMAP_ENTITY_HIERARCHY_V	ENTITY_TYPE	PARENT_ENTITY_TYPE
PFM_PORTFOLIOS	PORTFOLIO_ID	ENTITY_ID
KCRT_REQUESTS	REQUEST_ID	ENTITY_ID
KCRT_REQUEST_TYPES	REFERENCE_CODE	REQUEST_TYPE

Column Descriptions

Column Name	Null?	Data Type	Description
ENTITY_ID	NOT NULL	VARCHAR	Identifier for the 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.
REQUEST_TYPE	NULL	VARCHAR	Entity type if the value of ENTITY_TYPE is request
NAME	NULL	VARCHAR	The name of the entity
PARENT_ID	NULL	VARCHAR	Identifier for the parent entity.
PARENT_ENTITY_TYPE	NULL	VARCHAR	Identifier for the entity type of the parent entity

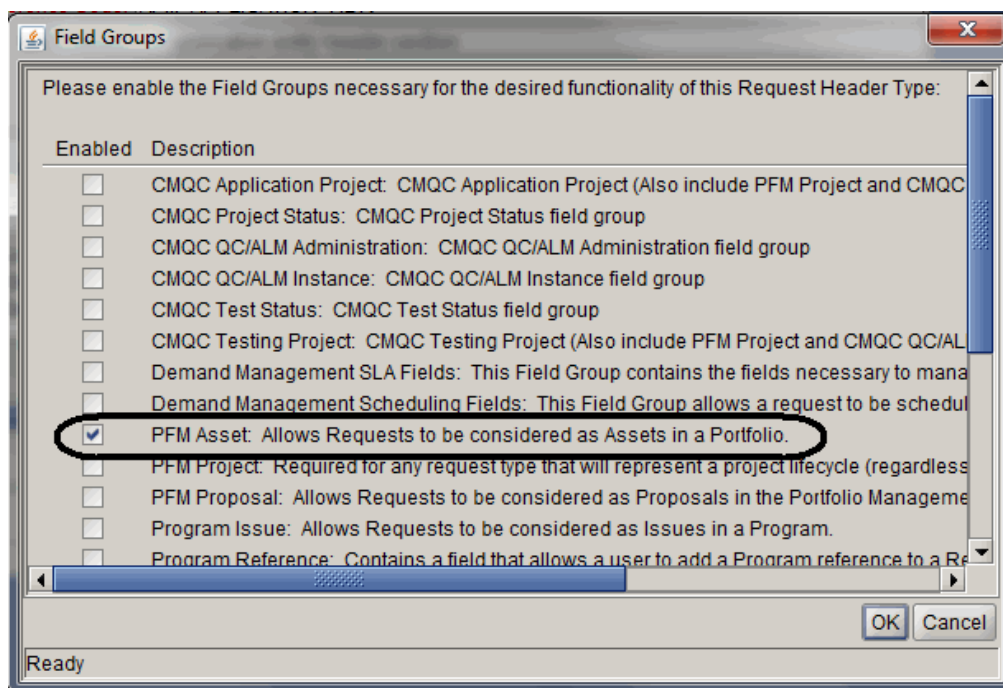
Defining Roadmap Hierarchy in the Portfolio Level

The system automatically fetches assets in the **Proposals/Projects/Assets** tab to generate roadmap hierarchy in the **Roadmap** tab of the portfolio page.

To define roadmap hierarchy in the portfolio level, you, as an APM administrator, only need to make sure that requests of desired roadmap types can be regarded as assets to be added in the **Proposals/Projects/Assets** tab of the portfolio page.

To do so,

1. Log on to PPM.
2. From the menu, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
The Request Type Workbench window opens.
4. Click **List** and then select the roadmap type you want to configure.
The Request Type window opens.
5. Under the Request Header Type field, click **Open**.
The Request Header Type window opens.
6. Click **Field Groups**.
The Field Groups window opens.



7. Select the option **PFM Asset: Allows Requests to be considered as Assets in a Portfolio**.
8. Click **OK**.

Defining Roadmap Phases and Milestones

As an APM administrator, you can define the roadmap phases and milestones according to your business needs.

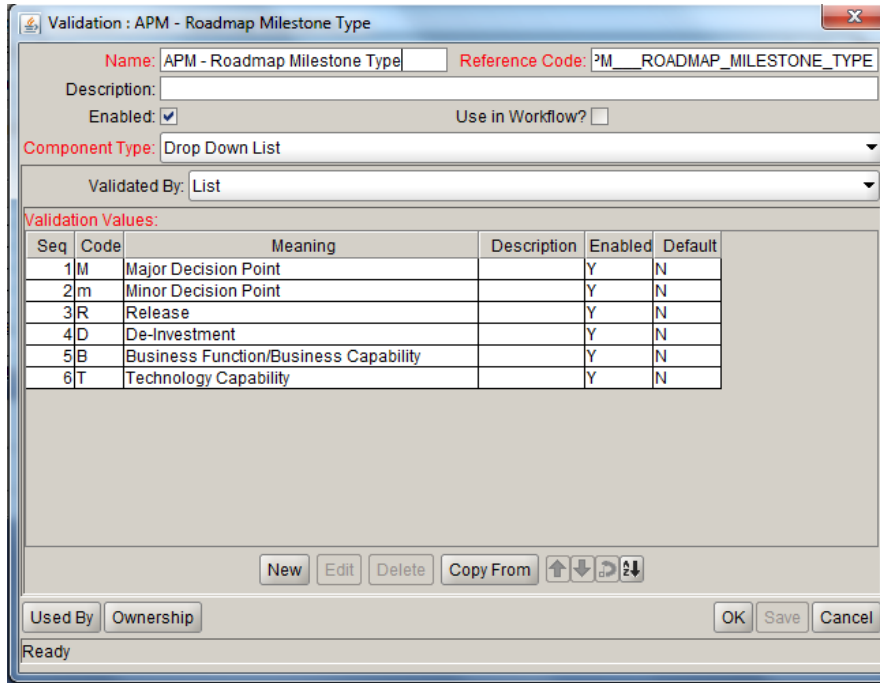
To define roadmap phases and milestones:

1. Log on to PPM.
2. From the menu, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Configuration > Validation**.
The Validation Workbench window opens.
4. Click **List** and then do the following:
 - Select **APM - Phase Type** if you want to define roadmap phases.
The Validation : APM - Phase Type window opens displaying the default roadmap phases.

Seq	Code	Meaning	Description	Enabled	Default
1	Evaluation	Evaluation		Y	N
2	Planned	Planned		Y	N
3	Operational	Operational		Y	N
4	Archived	Archived		Y	N
5	Planned Decommissioned	Planned Decommissioned		Y	N

- Select **APM - Roadmap Milestone Type** if you want to define roadmap milestones.
The Validation : APM - Roadmap Milestone Type window opens displaying the default

roadmap milestones.



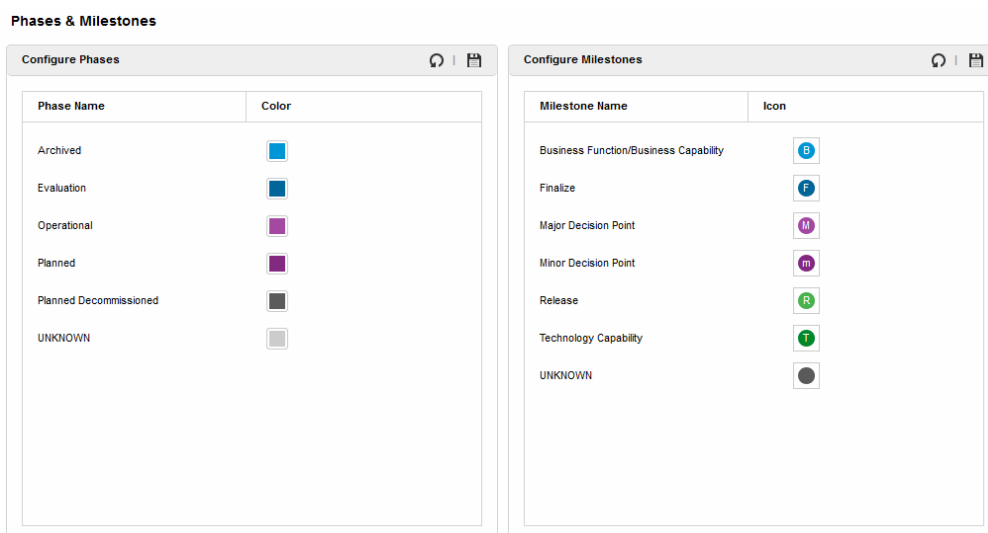
5. Edit the Validation Values section to define roadmap phases and milestones as you want.
6. Click **OK**.

Configuring Indicators for Roadmap Phases and Milestones

If you have the Open Workbench access grant, you can do the following to configure indicators for your defined roadmap phases and milestones:

1. From the PPM menu, select **Open > Application Portfolio > Roadmap Configure Center > Phases & Milestones**.

The Phases & Milestones Configuration page opens.



2. Do the following:

- If you want to configure the color for a roadmap phase.
 - i. Put your cursor over the color for a phase to select your desired color among multiple options.
 - ii. Click to save your change or click to cancel your change.
- If you want to configure the icon for a roadmap milestone,
 - i. Put your cursor over the icon for a milestone to select your desired icon among multiple options.
 - ii. Click to save your change or click to cancel your change.

The changes to the colors of phases and icons of milestones are applied on all existing roadmap charts accordingly.

If you want to customize the indicators for roadmap phases and milestones, you can do the following:

- Edit the file `default_phase_color.conf` located in the directory `<PPM-HOME>\server\<SERVER-NAME>\deploy\itg.war\web\knta\apm\roadmap\conf\`, if you want to customize the colors for roadmap phases.
- Edit the files `APM_Milestone*.png` located in the directory `<PPM-HOME>\server\<SERVER-NAME>\deploy\itg.war\images\apm\milestone\`, if you want to customize the icons for roadmap milestones.

The files for milestones icons should be png files, with the prefix `APM_Milestone`.

Chapter 3: User Management and Security

Overview of User Management and Security

This section describes Application Portfolio Management (APM) user types, security, defining users, and tracking user information.

APM User Types

There are three basic APM user types that can be configured:

- **User.** The most basic user of APM. The user may be actively involved in creating and managing applications, responding to surveys or requests for more information, or using portlets to view application data. Or, the user may not be an active user of APM and is set up for informational purposes only, to fulfill a certain role of an application or other entity, such as an Executive Sponsor or ITO Contact. For more information about the APM user, see *Application Portfolio Management User's Guide*. For more information about the different type of APM user roles, see "[User Roles](#)" on [page 25](#).
- **Analyst.** The most active user of APM. The analyst collects and sets up basic information about the organization and collects and consolidates data about applications into consumable information. The analyst can create and manage any APM entity, respond to surveys or requests for more information, analyze applications using application sets, portlets, reports, graphing, and groupings, import and export entity data, and define portlets. For more information about the APM analyst, see *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 to achieve his goals. The administrator installs, sets up, and maintains APM, defines users, customizes fields and validations for entities, and can create customized entities, data sources, workflows, validations, report types, and security groups.

We recommend the following settings when configuring a user of APM. Each user type has a distinct configuration of licenses and security groups to enable specific abilities that the user can perform.

Table 3-1. APM user type setup

User Type	License Type	Security Groups
User	<ul style="list-style-type: none">• Application Portfolio User	<ul style="list-style-type: none">• APM User
Analyst	<ul style="list-style-type: none">• Application Portfolio Analyst	<ul style="list-style-type: none">• APM User• APM Analyst

Table 3-1. APM user type setup, continued

User Type	License Type	Security Groups
Administrator	<ul style="list-style-type: none">• Configuration• User Administration	<ul style="list-style-type: none">• APM User• APM Analyst• APM Administrator

For a description of the licenses, see "[Licenses](#)" below and *Security Model Guide and Reference*.

For a list of access grants provided by each security group, see "[Table 3-2. APM security group access grants, continued](#)" on page 24.

Note: Any user's ability can be affected by the roles assigned to the user and any entity-level or field-level settings assigned to the user.

Security

This section addresses the data and process security related to APM. Configuring data and process security typically involves configuring licenses, security groups, access grants, entity-level settings, field-level settings, and setting user roles. APM provides two licenses, three security groups, two access grants, and several user roles to simplify data and process security. The following sections provide information about the licenses, security groups, access grants, and user roles required to secure actions or data related to APM features. See *Security Model Guide and Reference* for more information about entity-level settings and field-level settings.

Note: The screen and function access that access grants provide is cumulative. A user who belongs to three different security groups has access to the user interface and functionality provided to all three groups combined. Therefore, to restrict certain screen and feature access, you remove the user from any security group that grants that access.

To see all security groups that are assigned specific access grants, click the **Access Grants** tabs in the User window. You can then:

- Remove the user from the security group (using the **Security Group** tab in the User window).
- Remove the access grants from the security group (in the Security Group window). Do this only if no one in that security group needs the access that this access grant provides.

Licenses

Licenses provide access to and allow users to perform different actions in different parts of APM. Licenses determine the access grants that may be assigned to a user.

Two licenses for APM are provided with PPM:

- **Application Portfolio User.** Provides the same access as the Demand Management application license. However, unless additional product licenses have been purchased, users assigned this license should be limited to the APM User security group and its access grants. When assigned, both an Application Portfolio User and Demand Management license are counted as the licenses used.
- **Application Portfolio Analyst.** Provides the same access as the Configuration system level license. However, unless additional product licenses have been purchased, analysts assigned this license should be limited to the APM User and APM Analyst security groups and their access grants. When assigned, both an Application Portfolio Analyst and Demand Management license are counted as the licenses used while the Configuration system level license is not counted.

Note: When a user is assigned the Application Portfolio Analyst license, while it is the same as the Configuration system level license, it should not be counted towards the quantity of Configuration licenses used. In the License Administration window of the PPM Workbench and in the Run License Usage Report, the quantity of Configuration licenses is accurately reported. However, if you have created a custom report or portlet on licensing or are using data directly from the database, the total quantity of Configuration licenses used includes the quantity Application Portfolio Analyst licenses used. For example, if you have purchased 5 Application Portfolio Analyst licenses and 5 Configuration licenses, if you assign 2 Application Portfolio Analyst licenses, the License Administration window displays that you have 3 Application Portfolio Analyst licenses and 5 Configuration licenses available. In your custom report or portlet, it would show that 3 Application Portfolio Analyst licenses and 3 Configuration licenses are available.

Security Groups

APM provides three security groups to which you can assign users:

- **APM User.** The APM User creates and manages his own application entities, responds to surveys or requests for more information, and uses portlets to view application data. See *Application Portfolio Management User's Guide* for more information about the APM user's role.
- **APM Analyst.** The APM Analyst has all the abilities of an APM User and can create and manage any APM entity, analyze applications using application sets, portlets, reports, graphing, and groupings, import and export entity data, and define portlets. See *Application Portfolio Management Analyst's Guide* for more information about the APM analyst's role.
- **APM Administrator.** The APM Administrator installs, sets up, and maintains APM, defines users, customizes fields and validations for entities, and can create customized entities, data sources, workflows, validations, report types, and security groups. See "[The Role of the APM Administrator](#)" on page 5 for more information about the APM administrator's role.

Note: Any user's ability can be affected by the roles assigned to the user and any entity-level

or field-level settings assigned to the user.

"Table 3-2. APM security group access grants, continued" on page 24 shows the access grants assigned to each APM security group. For a description of PPM access grants, see Security Model Guide and Reference. For a description of APM-specific access grants, see "Access Grants" on page 25.

Note: View access grants provide read-only access to screens and entities. Users who do not have a view access grant cannot see certain workbenches and windows.

Edit access grants typically enable a user to view, create, modify, and delete entities. For example, if you have the Edit Requests access grant, you can delete requests that you have created.

Table 3-2. APM security group access grants

Category	Access Grant Name	Security Groups		
		APMUser	APM Analyst	APM Administrator
Config	Edit Report Types			✓
Config	Edit Validation Values			✓
Config	Edit Validations			✓
Config	View Notification Templates			✓
Config	View Report Types			✓
Config	View Special Commands			✓
Config	View User Data			✓
Config	View Validations			✓
Config	View Workflows			✓
Demand Mgmt	Access Request Query Builder	✓	✓	✓
Demand Mgmt	Edit Request Header Types			✓
Demand Mgmt	Edit Request Types			✓

Table 3-2. APM security group access grants, continued

Category	Access Grant Name	Security Groups		
		APMUser	APM Analyst	APM Administrator
Demand Mgmt	Edit Requests	✓	✓	✓
Demand Mgmt	View Request Header Types		✓	
Demand Mgmt	View Request Types		✓	
Demand Mgmt	View Requests	✓	✓	
Deployment Mgmt	View Packages			✓
Financial Mgmt	Edit Actuals on Financial Summary	✓	✓	
Financial Mgmt	Edit Approved Budget	✓	✓	
Financial Mgmt	Edit Cost Security	✓	✓	✓
Financial Mgmt	Edit Financial Benefits	✓	✓	
Financial Mgmt	Edit Forecasts on Financial Summary	✓	✓	
Financial Mgmt	Set a Financial Summary Snapshot as the Plan of Record	✓	✓	
Financial Mgmt	View Costs on Financial Summary	✓	✓	
Financial Mgmt	View Financial Benefits	✓	✓	

Table 3-2. APM security group access grants, continued

Category	Access Grant Name	Security Groups		
		APMUser	APM Analyst	APM Administrator
Portfolio Mgmt	Assess Application Portfolio		✓	✓
Sys Admin	Configure Modules			✓
Sys Admin	Distribute Modules			✓
Sys Admin	Edit Security Groups			✓
Sys Admin	Edit Users			✓
Sys Admin	Manage Translations			✓
Sys Admin	Server Administrator			✓
Sys Admin	Server Tools: Execute Admin Tools			✓
Sys Admin	Server Tools: Execute SQL Runner			✓
Sys Admin	View Security Groups			✓
Sys Admin	View Server Tools			✓
Sys Admin	View Users			✓
System	Edit All Reports			✓
System	Edit Portlet Definition		✓	✓
System	Import Data		✓	✓
System	Open Workbench			✓
System	Ownership Override			✓
System	Submit Reports		✓	✓
System	View Portlet Definition		✓	✓

Access Grants

Access grants enable certain activities within APM and PPM. APM uses the access grants that come with PPM and provides additional predefined access grants.

Table 3-3. APM access grants

Category	Access Grant Name	Description
Portfolio Mgmt	Assess Application Portfolio	View and edit all entities, view and run APM reports, and run dynamic graphing.
System	Import Data	Currently not used.

User Roles

There are several roles that may be assigned to a user within APM. Some of these roles allow that user to perform additional functions such as viewing or modifying data. A user may already be able to perform these additional functions if, for example, the user is the creator of the entity.

Table 3-4. APM user roles

Role	Tasks
Benefits Manager	View application information in the Header, Business Environment, Technical Environment, Budget & Resources, and Usage & Scale sections and edit the benefits information in the financial summary.
Budget Manager	View application information in the Header, Business Environment, Technical Environment, Budget & Resources, and Usage & Scale sections and edit the budget information in the financial summary.
Business Owner	View and edit all application information in the Header, Business Environment, Technical Environment, Budget & Resources, Service & Support, Usage & Scale, Rating, and Score sections.
Executive Sponsor	No additional abilities, informational only.
IT Sponsor	No additional abilities, informational only.
ITO Contact	No additional abilities, informational only.
Owner	View and edit the owned entity.
Resource	No additional abilities, informational only.

Table 3-4. APM user roles, continued

Role	Tasks
Respondent	View and edit all application information in the Header, Business Environment, Technical Environment, Budget & Resources, Service & Support, Usage & Scale, Rating, and Score sections.
SME (Subject Matter Expert)	View application information in the Header, Business Environment, Technical Environment, Usage & Scale, Rating, and Score sections.
Survey Respondent	View application information in the Header, Business Environment, Technical Environment, and Usage & Scale sections.
Technical Owner	View and edit application information in the Header, Business Environment, Technical Environment, Service & Support, Usage & Scale, Rating, and Score sections.

Defining Users

When you determined the type of data to collect for applications, you also collected information about users who would be fulfilling the roles in the application analysis process. You must define these users before the analyst can import this application data.

See "[Table 3-1. APM user type setup, continued](#)" on page 20 for the recommended settings when configuring an APM user.

For information on how to define and create users, see *Security Model Guide and Reference*.

Tracking User Information

APM provides preconfigured modules and portlets for you to track basic user information. You may also create your own set of modules and portlets to track user information.

APM Administrator Module

PPM supplies a preconfigured APM Administrator module that contains user-related default portlets for use by the administrator. This section provides a description of the user-related shared Dashboard page and portlets in the APM Administrator module.

Note: The preferences of the portlets in the APM Administrator module cannot be edited.

For more information about how to use the PPM Dashboard pages, see *Creating Portlets and Modules*.

User Administration Shared Dashboard Page

The User Administration shared Dashboard page for the APM administrator displays portlets with user information that the you might want to track regularly. This includes the quantity of users by role and a list of all users.

Figure 3-1. Example User Administration page

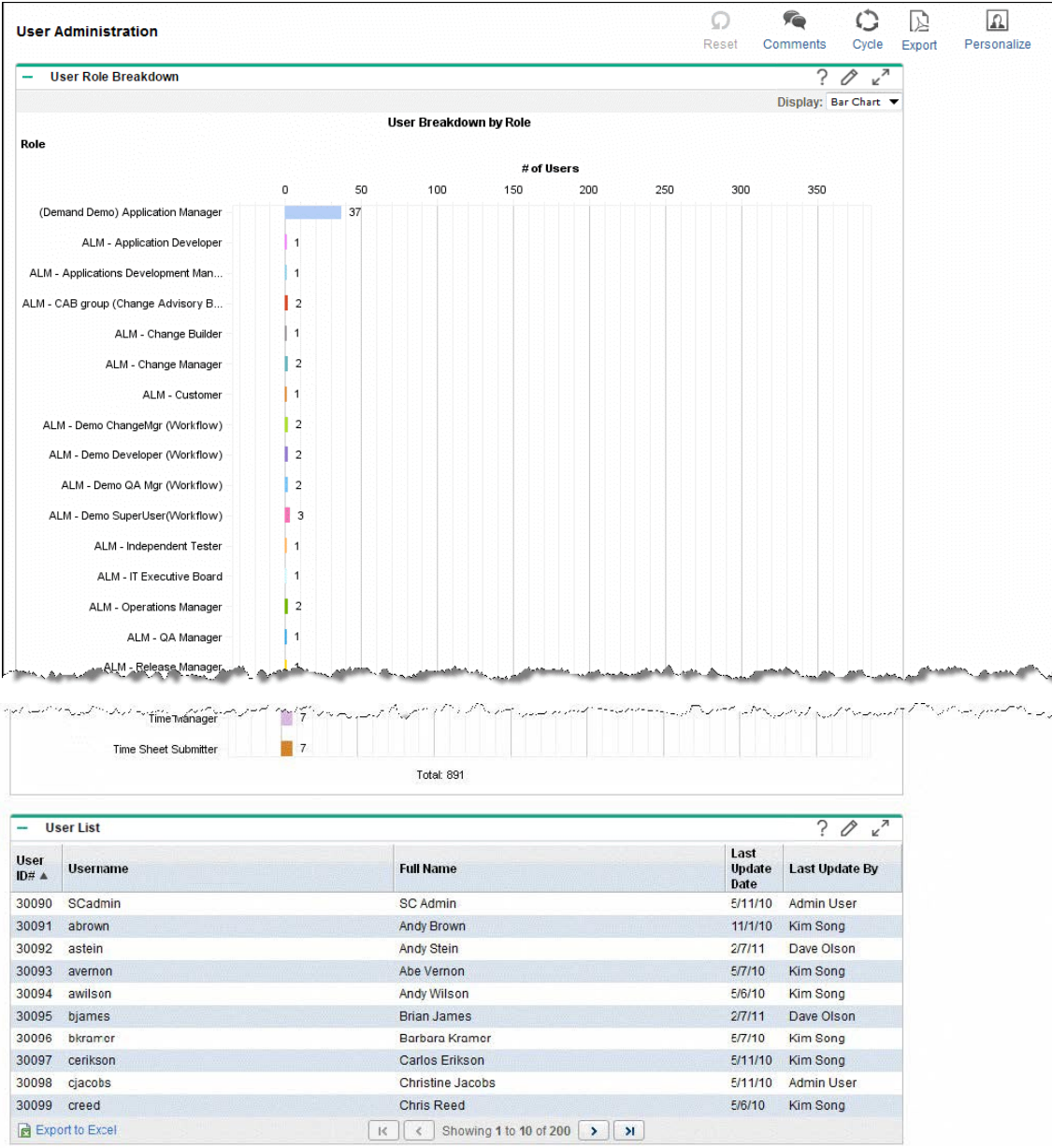


Table 3-5. User Administration portlets

Portlet Name	Description
User Role Breakdown	<p>This portlet displays the quantity of users by role. Use this portlet to track how many users and how many users by role are defined.</p> <p>See "User Role Breakdown Portlet" on the next page for more information.</p>
User List	<p>This portlet displays a list of all users. By default, the portlet displays a user's ID number, username, full name, when the last change was made to the user, and who made that change. Use this portlet to track users.</p> <p>By default, users are listed in ascending order by user ID.</p> <p>See "User List Portlet" below for more information.</p>

User List Portlet

The User List portlet displays a list of all users. By default, this portlet displays a user's username, full name, when the last change was made to the user, and who made that change. Use this portlet to track users configured.

By default, users are listed numerically (lowest to highest) by User ID#.

Preferences and Choose Display Columns

Edit the preferences and display columns to filter the results that are displayed in the portlet.

Table 3-6. User List portlet filters

Field (*Required)	Description
Security Group	Specify zero (all) or one security group to display the users that belong to that security group. If no security group is specified, all users for which data is available are displayed.
Sort By	Select the column used to sort the data.
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	<p>Default: 10</p> <p>Specify the number of users displayed in the normal portlet view.</p> <p>Type any integer greater than zero.</p>

Table 3-6. User List portlet filters, continued

Field (*Required)	Description
*Rows Displayed in Maximized View	Default: 50 Specify the number of users 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 portlet help 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.

User Role Breakdown Portlet

The User Role Breakdown portlet displays the quantity of users by role. Use this portlet to track how many users and how many users by role are defined.

Note: The total listed in this portlet is the total number of roles that are assigned, not the total number of users. A user may be assigned more than one role, therefore this total may be greater than the total number of users.

From this portlet, you may drill down to display, for a selected role, a list of users by ID number, username, full name, when the last change was made to the user, and who made that change.

Chapter 4: Entity Management

Overview of Entity Management

Application Portfolio Management (APM) provides preconfigured portlets and modules for you to manage entities (you also have access to the APM user and APM analyst preconfigured Dashboard pages). You may create your own set of portlets and modules to manage entities (see *Creating Portlets and Modules* for more information).

APM Administrator Module

Micro Focus supplies a preconfigured APM Administrator module that contains entity-related default portlets for use by the administrator. This section provides a description of the entity-related shared Dashboard page in the APM Administrator module.

Note: The preferences of the portlets in the APM Administrator module cannot be edited.

For more information about how to use the PPM Dashboard pages, see *Creating Portlets and Modules*.

Entity Administration Shared Dashboard Page

The Entity Administration shared Dashboard page for the APM administrator displays portlets with entity information that you might want to track regularly. This includes the quantity of entities registered on the instance and a list of all entities.

Figure 4-1. Example Entity Administration page

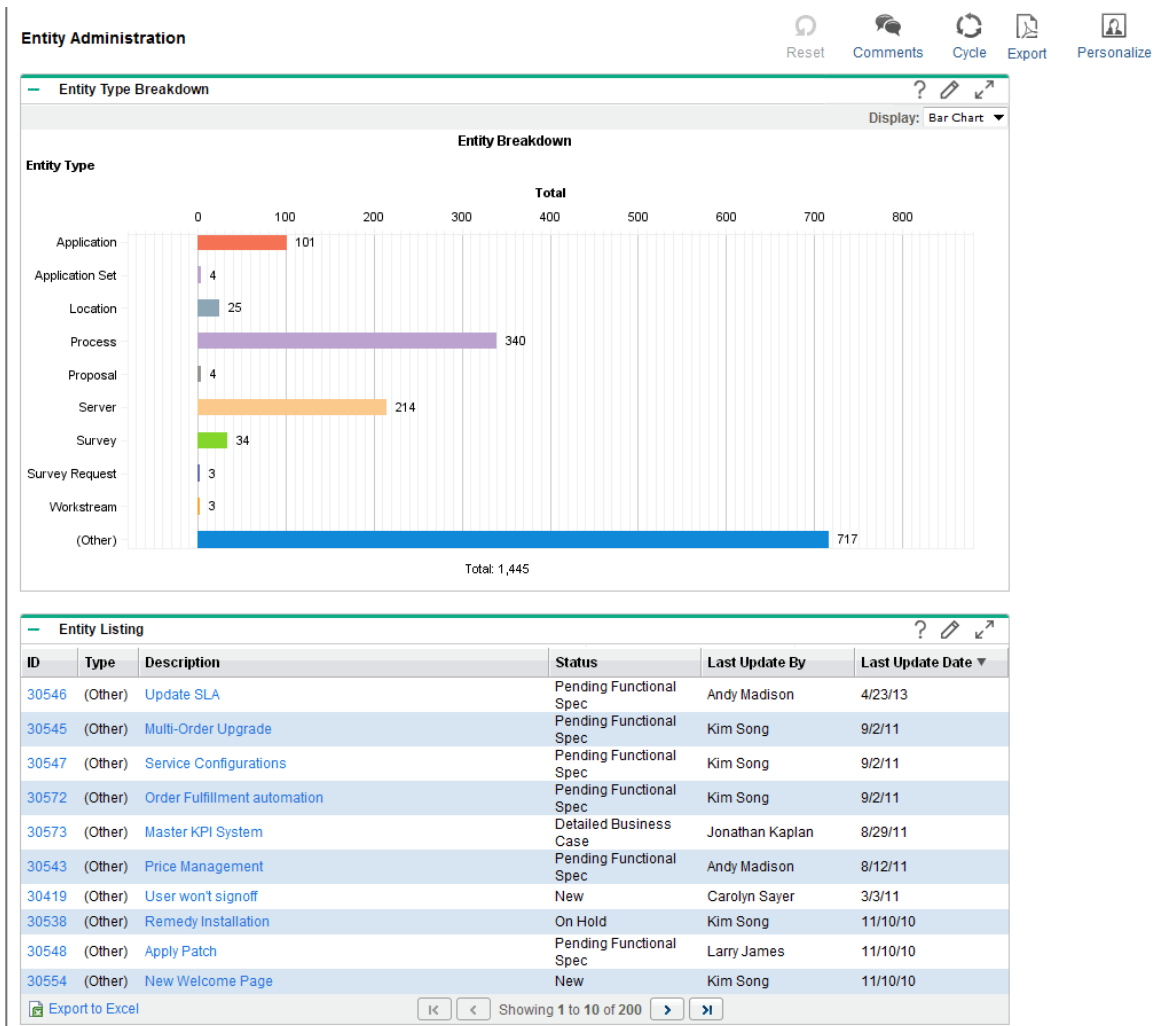


Table 4-1. Entity Administration portlets

Portlet Name	Description
Entity Type Breakdown	<p>This portlet displays the quantity of entities by entity type. This portlet can be displayed as a bar chart (default), pie chart, or list. Use this portlet to track how many entities by entity type are registered on the instance.</p> <p>By default, entity types are listed in alphabetical order.</p> <p>See "Entity Type Breakdown Portlet" on page 34 for more information.</p>

Table 4-1. Entity Administration portlets, continued

Portlet Name	Description
Entity Listing	<p>This portlet displays a list of all entities. By default, this portlet displays the entity's ID, entity type, description, status, when the last change was made to the entity, and who made that change. Use this portlet to track registered entities.</p> <p>By default, entity types are listed in ascending order by the date (earliest to latest) of the last change (Last Update Date).</p> <p>See "Entity Listing Portlet" on the next page for more information.</p>

PPM-Supplied Portlets for the APM Administrator

You can use the PPM-supplied application portfolio portlets to organize and present information and drill down on displayed data to view more detail. You can add PPM-supplied portlets to your PPM Dashboard pages and customize them to suit your information needs. Refer to the online help for more information about each portlet.

The following portlets are provided:

- Application Health Breakdown
- Application Portfolio Size
- Application to Process Coverage
- Application Value Assessment
- Entity Listing
- Entity Type Breakdown
- List of Applications (Analyst)
- List of Applications (User)
- My Applications
- My Survey Requests
- My Surveys
- My Transformation Proposals
- My Workstreams
- Rating of Transformation Proposals
- TCO Summary
- User List
- User Role Breakdown

The following portlets are provided exclusively for the APM administrator. For each of these portlets, a screenshot and description of fields are provided. Descriptions of the other portlets are provided in the *Application Portfolio Management User Guide* and *Application Portfolio Management Analyst Guide*.

- ["Entity Listing Portlet" below](#)
- ["Entity Type Breakdown Portlet" on the next page](#)
- ["User List Portlet" on page 28](#)
- ["User Role Breakdown Portlet" on page 29](#)

For more information about personalizing and maintaining the portlets, see *Creating Portlets and Modules*.

Entity Listing Portlet

The Entity Listing portlet displays a list of all entities. By default, this portlet displays the entity's ID, entity type, description, status, when the last change was made to the entity, and who made that change. Use this portlet to track registered entities.

Preferences and Choose Display Columns

Edit the preferences and display columns to filter the results that are displayed in the portlet.

Table 4-2. Entity Listing portlet filters

Field (*Required)	Description
Entity Type	Specify zero (all) or one type of entity to display. If no entity type is specified, all entities for which data is available are displayed.
Sort By	Select the column used to sort the data.
Ascending/Descending	Indicate the sorting sequence.
*Rows Displayed	Default: 10 Specify the number of entities displayed in the normal portlet view. Type any integer greater than zero.
*Rows Displayed in Maximized View	Default: 50 Specify the number of entities displayed in a maximized portlet. Type any integer greater than zero.

Table 4-2. Entity Listing portlet filters, continued

Field (*Required)	Description
Available Columns	The names of columns that can be displayed in the portlet but are currently not displayed. Refer to the online portlet help 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.

Entity Type Breakdown Portlet

The Entity Type Breakdown portlet displays the quantity of entities by entity type. This portlet can be displayed as a bar chart (default), pie chart, or list. Use this portlet to track how many entities by entity type are registered on the instance.

From this portlet, you may drill down to display, for a selected entity type, a list of entities by ID, entity type, description, status, when the last change was made to the entity, and who made that change.

Sorting in List Portlets

Sort the list by a column's value by clicking on the column label. The sort icon (an upward or downward pointing triangle) denotes the column on which the list is sorted. An upward pointing triangle means the list is sorted in ascending (lowest to highest) order. A downward pointing triangle means the list is sorted in descending (highest to lowest) order. To change the sort order of the column, click on the label with the sort icon.

Chapter 5: Data Migration

If you have multiple PPM instances (for example, development, test, and production), and want to migrate APM entity data from one instance to another without losing original information (such as Created By and Created On), use the Migrate option in the PPM Data Migrator for Microsoft Excel (Data Migrator).

Note: To access the Migrate option in the Data Migrator, you must have the Sys Admin: Migrate PPM Objects access grant. This access grant is part of the PPM Administrator, PPM Service Security Group, and PPM All Access Grants security groups.

For information about the Data Migrator, see *Application Portfolio Management Analyst's Guide*.

Send Us Feedback



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