**Draft of Stories for Portfolio Health Assessment Tool**

As a Technical Architect, I want to be able to add **systems** to PenFed’s Portfolio so that an accurate list of **systems** used by PenFed is maintained

* User most fill in all required data before system can be added
* Information is stored in application database
* Following data is required:
  + name, short name, description , TIME rating, deployment model (on premise, cloud, etc.) , software type (open source, vendor, custom built, etc.), if software type is vendor include vendor name
* Following data is optional
  + Computing type ( distributed, mainframe), database/storage (SQL Server, Oracle , UDB ,etc. ),language (Java, Cobol, .NET, etc.) , operational owner, technical architect assigned, business owner, notes

As a Technical Architect, I want to be able create **domains** so that I can group systems together based on business capabilities

* User most fill in all required data before system can be added
* Information is stored in application database
* Following data is required:
  + name, short name, description

As a Technical Architect, I want to be able to create **business areas** so that I can group like **domains** together

* User most fill in all required data before business are can be added
* Information is stored in application database
* Following data is required:
  + name, short name, description

As a Technical Architect, I want to be able to create **organizations** so that I can group **business areas** under the **organization** they support

* User most fill in all required data before organization can be added
* Information is stored in application database
* Following data is required:
  + name, short name, description

As a Technical Architect, I want to be able to assign **domains** to **business areas** so that I document which **domains** support a **business areas**

* User most fill in all required data before assignment can occur
* Information is stored in application database
* Following data is required:
  + Business area, Domain, weight (%)

As a Technical Architect, I want to be able to assign **business areas** to **organizations** so that I document which **business areas** support an **organization**

* User most fill in all required data before assignment can occur
* Information is stored in application database
* Following data is required:
  + Organizations**,** Business area, weight (%)

As a Technical Architect, I want to be able to assign **systems** to **domains** so that I document which **systems** support a **domain**

* User most fill in all required data before assignment can occur
* Information is stored in application database
* Following data is required:
  + Domain, system weight (%)

As a Business Architect, I want to be able create **business capabilities** so that I can document the **business capabilities** needed to support PenFed’ Business vision

* User most fill in all required data before business capability can be added
* Information is stored in application database
* Following data is required:
  + Enterprise group (drop down) , name, short name, description

As a Business Architect, I want to be able create **business capabilities** so that I can document the **business capabilities** needed to support PenFed’ Business vision

* User most fill in all required data before assignment can occur
* Information is stored in application database
* Following data is required:
  + Business capability , system , comment

As a Business Architect, I want to be able assign **business capabilities** to **systems** so that I can document which **business capabilities** each **system** provides

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Resue, architecture alignment, life stage, security

As a Technical Architect, I want to be able to create an **assessment** of **systems** in PenFed’s Portfolio so that I can assess the health of each **system**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Reuse, architecture alignment, life stage, security

As an application owner, I want to be able to create an **assessment** of **systems** in PenFed Portfolio so that I can assess the operation of each **system**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Availability , Scalability , Supportability , Agility

As a Business Architect, I want to be able to create an **assessment** of **systems** in PenFed Portfolio so that I can assess the business capabilities of each **system**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Functionality , Usability

~~As a Technical Architect, I want to be able to assign a TIME (Tolerate, Invest, Migrate, Eliminate) rating to~~ **~~systems~~** ~~in PenFed’s Application Portfolio so that I can communicate the value and high level direction of each~~ **~~system~~**

As a Technical Architect, I want to be able to create a **system** **recommendation** so that I can document ways to improve the health of a given **system**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Name , Description , ranking/order

As a Technical Architect, I want to be able to create a **domain recommendation** so that I can document ways to improve the health of a given **domain**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Name , Description , ranking/order

As a Technical Architect, I want to be able to create a **business area recommendation** so that I can document ways to improve the health of a given **business area**

* User most fill in all required data before assessment can occur
* Information is stored in application database
* Following data is required:
  + Name , Description , ranking/order

As a user, I want to be able create **investments** so I can document efforts have funding vehicles are

* User most fill in all required data before investment can be created
* Information is stored in application database
* Following data is required:
  + Name , Description , size (small , med, large, XL),
* Following data is optional
  + Year and quarter of start, year and quarter of end of investment

As a user, I want to be able assign **investments** to **recommendation** (business area, domain or systems) so that I can document which **recommendations** have funding vehicles

* User most fill in all required data before investment assigned
* Information is stored in application database
* Following data is required:
  + Investment , recommendation

As a user, I want to be able to view the **assessment** for all **systems** that belong to a selected organization so that I can assess the health of an **organization**

* User is able to filter by org
* User is able select output data:
  + View by systems
  + View by domains
  + View by business area

As a user, I want to be able to view the **assessment** for all **systems** that belong to selected business area so that I can assess the health of a **business area**

* User is able to filter by business area
* User is able select output data:
  + View by systems
  + View by domains

As a user, I want to be able to view the **assessment** for all **systems** that belong to selected domain area so that I can assess the health of a **domain** area

* User is able to filter by domain area
* User is able select output data:
  + View by systems

**Scoring Model**

Agility 1-5

1. Asset takes a very long time to respond to requirement changes
2. Asset takes a significant amount of time to respond to requirement changes
3. Asset takes a moderate amount of time to respond to requirement changes
4. Asset is fairly simple to maintain and tailor to meet business needs
5. Asset is easy to maintain and tailor to meet business needs; it is highly responsive to requirement changes

Functionality 1-5

1. Provides no features needed by the users
2. Provides limited features needed by users
3. Provides some features needed by users
4. Provides most features needed by users
5. Provides all features needed by users

Usability 1-5

1. The asset is difficult and/or cumbersome to use , negatively affecting productivity
2. The asset is not user friendly, potentially making a user’s job more challenging at times
3. The usability of the asset is average
4. The usability of the asset is strong – making the user’s job less difficult
5. The usability of the asset greatly enhances a user’s productivity

Cost - ??? Need to figure out what cost we are capturing??

1. 0 - $1M
2. $1M - $3M
3. $3M - $5M
4. $5M - $10M
5. $10M+

Reuse 1-5

1. Asset is not used across business areas or business domains
2. Asset has the ability to support two business domains
3. Asset has the ability to support multiple business domains
4. Asset has the ability to support multiple business areas
5. Asset has the ability to support the enterprise

Architecture Alignment 1-5

1. Asset does not align with architecture standards (waiver does not exist)
2. Asset does not align with architectural standards (waiver exists)
3. Asset aligns with all architecture principles and standards but is not a target state platform
4. Asset aligns with all architecture principles and standards and is a target state platform
5. Asset aligns with all architecture principles and standards and is a target state platform from a strategic partner

Life Stage 1-5

1. Asset is new in all three areas : new to PenFed, new to Supplier, new to industry --(bleeding edge)
2. Asset is new in two of three areas: new PenFed, new to Supplier, new to industry -- (cutting edge)
3. Asset is new in one of three areas: new PenFed, new to Supplier and a new industry offering
4. Asset is an established product , from an established supplier that PenFed has experience
5. Asset is an established product , from an strategic supplier that PenFed has experience

Availability

1. Asset cannot support PenFed’s availability requirements and there is no plan in place to address gap
2. Asset cannot support PenFed’s availability requirements and there is a plan in place to address gap
3. Asset can support PenFed’s availability requirements

Scalability

1. Asset cannot scale to be meet expected volumes
2. Asset can scale to meet expected volumes but requires significate investment
3. Asset can scale to meet expected volumes but requires moderate investment
4. Asset can scale to meet expected volumes but requires minor investment
5. Asset can scale to meet expected volumes with no investment

Security

1. Asset does not comply with security standards and no plan is in place to address gap
2. Asset does not comply with security standards but a plan to address gap is in place
3. Asset complies with security standards

Supportability

1. Asset is highly unstable and requires major maintenance effort
2. Asset is fairly unstable and requires significant maintenance effort
3. Asset is moderately stable and requires moderate maintenance effort
4. Asset is somewhat unstable but required maintenance is minor
5. Asset is stable and has few or no issues at all to keep it running

**Examples Reports/Dashboards**

Bubble Chart (could use IT value and Business Value as X/Y axis for systems, domain or business area)

**Example Summary Reports/Dashboard**

Org Report

|  |  |  |
| --- | --- | --- |
| **Organization** | **Business Area** | **Rating** |
| **PenFed** | -------------------- | 2.5 |
|  | **Product** | 2.6 |
|  | **Sales & Servicing** | 1.5 |
|  | **Risk Compliance** | 1.8 |
|  | **Business Support** | 4.0 |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Business Area Report |  |  |
|  |  |  |
| **Business Area** | **Domain** | **Rating** |
| **Product** | -------------------- | 2.6 |
|  | **Home Loan** | 2.6 |
|  | **Credit Card** | 1.5 |
|  | **Auto Loan** | 3.3 |
|  | **Deposits** | 3.1 |
|  |  |  |
| Domain Report |  |  |
|  |  |  |
| **Domain** | **System** | **Rating** |
| **Home Loans** | -------------------- | 2.6 |
|  | **UniFi** | 2.6 |
|  | **Fannie Mae** | 1.5 |
|  | **MortgageBot** | 3.3 |
|  | **Elynx** | 3.1 |