SOFTWARE
REVIEW262

Steve Cotterell ticks the last of the Planview family of products off his "to review" list with this look at their enterprise architecture software.

Troux 14

An enterprise architecture tool designed to help organisations manage their enterprise IT assets and support their business goals.

When I reviewed Planview's Innotas, back in the March issue of this year, I mentioned that Planview saw its market as a re-definition of the programme and project management (PPM) process as 'work and resource management' (WRM) in order to connect strategy and execution with the optimisation of resources - people, technological and financial assets. I noted that Planview addresses this concept with its four software applications designed to assist users deliver results and achieve the required speed to market or digital transformation.

Following my March review of Innotas (which focuses on portfolio and resource management and is marketed for large organisations with a lower maturity level and also low maturity small to mid-market companies), and my recent reviews of Planview Enterprise (marketed for WRM in larger or more mature organisations) and Projectplace (which is strong on work management and collaboration) this just left one of the four applications for me to review.

I hoped that it would not be long before I was able to review that fourth application, Troux, enterprise architecture software for capability and technology management and, happily, that wish has now been granted.

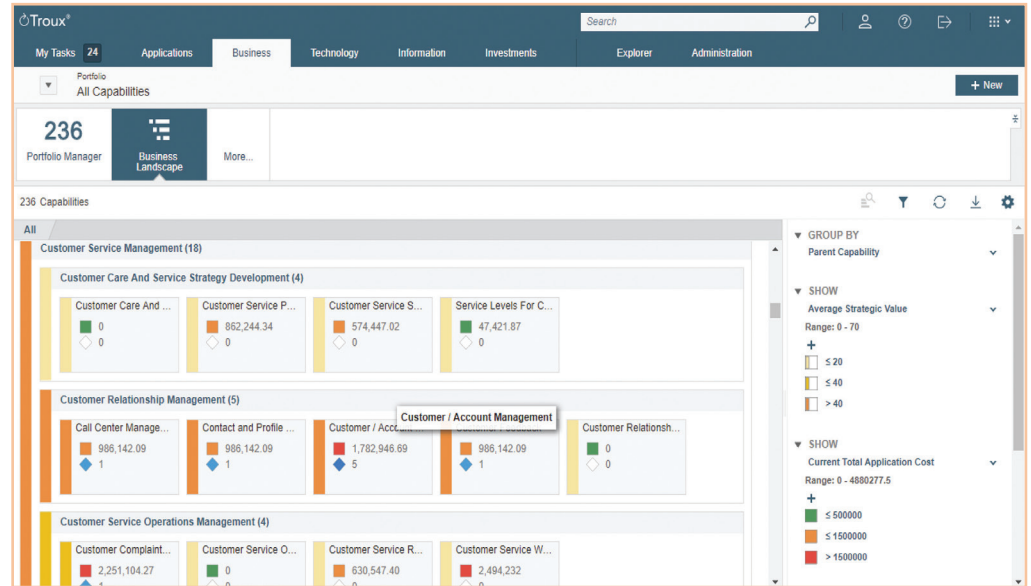The purpose of an Enterprise Architecture system is to help organisations manage their enterprise IT assets in order to support their business goals in the best way they can. It is therefore designed to help the business understand, from an IT perspective, what are the activities it needs to support to achieve a specified business goal. It helps an organisation plan its business capability model, identifying the high level factors it needs to follow in order to achieve its business needs.

It assists senior management with their high level strategic planning and IT road mapping, informing them about the systems in use, alerting them to cross dependencies between projects and helping them understand what the future requirements will be.

Such a system should enable an organisation to optimise its application ownership costs and understand how much they're spending on individual technologies, and the total cost of each process that depends on a selection of technological systems. Senior management needs to know what their total capability spend is and how their assets are allocated between the capabilities so they can evaluate risk and reduction in IT spend.

There are risks that need to be managed. Increasingly, data privacy becomes a serious issue and an organisation needs to know what sort of information it's storing, where it's held and, particularly, where the confidential data is stored. There are also technological risks to be managed and I'll cover some of these later.

Troux, which follows The Open Group Architecture Framework (TOGAF) standard guidelines, was acquired by Planview a couple of years ago. However, it's been available in the UK since 2005. The fundamental purpose of Troux is to help companies manage complex landscapes with multiple applications and multiple owners. There are about forty Troux customers, with fifteen thousand users, in Europe with 75% of them being located in the UK, including many large, household name organisations. Globally, it has an installed base of about 200 customers, including companies like World Bank and Meijer, a North American supercentre chain that is ranked as one of Forbes largest private companies.

A Capability Map

Both SaaS and on premise versions are available. The data for UK SaaS customers is held in the UK, with the backups also being held here.

Whilst the software is capable of delivering a wide spread of functionality, This review will concentrate on its core functionality, that which is used by the greater number of clients.

When you open the products you see a configurable, role-based screen featuring the organisation's required business capabilities. New in version 14, across the top of the screen is a ribbon containing tiles which can contain reports, forms or dashboards. Both the set of tiles and their contents are also role-based. You click on a tile to see it enlarged in the main screen area.

This may be a report that lists the required business capabilities and beneath each capability is shown the sub capabilities that contribute to the higher level capability. Within the box featuring each sub capability is a set of KPIs and, on the right-hand side of the screen is a legend box to help you understand the information displayed in these boxes.
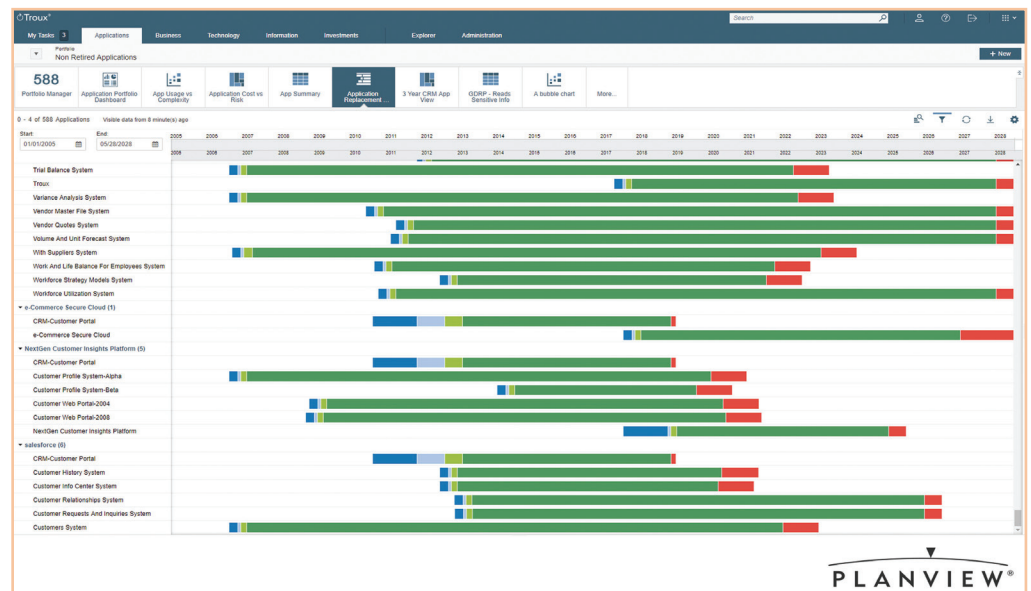
Among the KPIs shown may be the capabilities' strategic value. Each capability can be linked to a strategic goal and scored for the value of its contribution to that goal. Another may be the current application cost - the total cost of the applications that serve this capability. Also shown may be the future project count - the number of projects in hand that will make changes to this capability.

The standard configuration of the SaaS system contains several hundred KPIs but, as it's configurable, new KPIs can be added. The value ranges and the colour coding of the KPI display can also be configured by users with the appropriate administration rights.

Every application has an owner who is responsible for updating the information about that application. Depending upon organisational requirements, each owner may own (for example) five to twenty-five applications. Each owner may get a customised user interface and (again, depending upon the organisation) the owner will be required to enter the application cost, lifestyle and use data, scoring them under various headings. Some KPIs are used as criteria for applications and some of these are calculated, by the system, using property values that can be manually entered or which may be fed in from external applications. Others may be purely manually entered. Scores can be weighted if required.

Above the tile ribbon is a set of tabs and if you now click the "Application" tab, you see a patchwork screen (a Tree Map) with each box on the screen representing an application. These boxes are grouped below the capabilities they serve and each can be sized according to a specific KPI, such as the cost of the application, and each can be coloured by another KPI, say the technological risk - for example, does it depend on a technology that is no longer supported? Again, all is configurable.

Remaining under the Applications tab, you can switch to a portfolio-based analytical view showing, on a bubble chart, the relative cost and technological
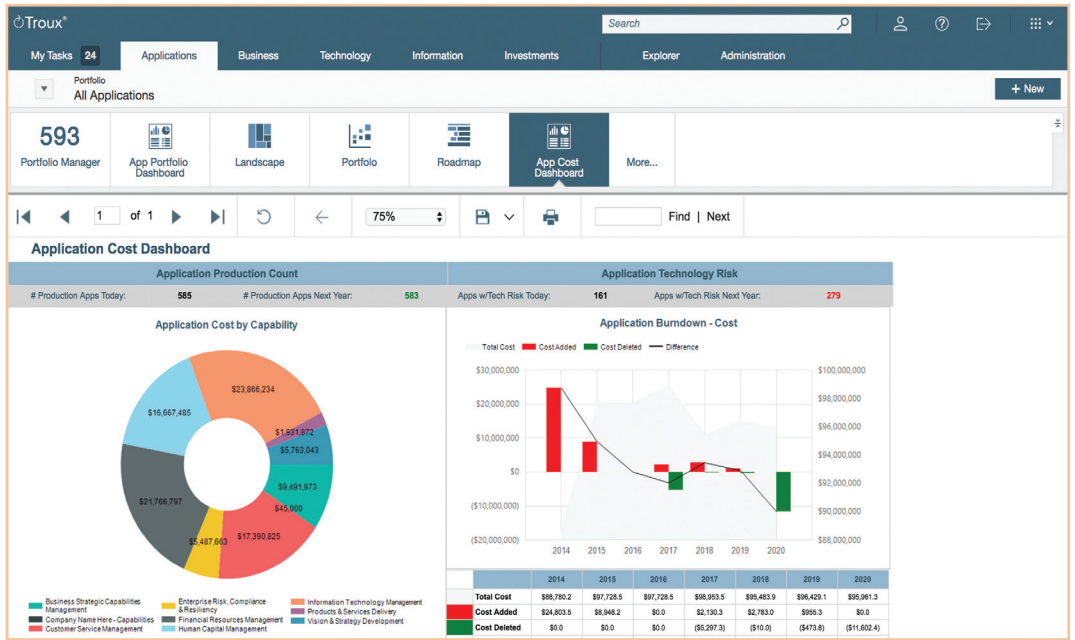

A Tree Map showing the Application Landscape

risk of each application, any functional redundancy and the application's complexity. This chart is designed to assist decisions about the decommissioning of specific applications.

An application's functional redundancy is found by considering what are the functions it provides and asking if there's another application that's doing the same thing. This is likely to occur when companies are merged and, because both companies have applications that perform similar tasks, system redundancy occurs. It's the application owner's job to enter this information. In addition, the reference list of functionality can be loaded though integrations.

A Troux cost dashboard

An application's complexity is measured by the number of other applications that depend on it, for example, the number of interfaces it has with other applications, the number of data points, and the number of skill types taken to maintain it.
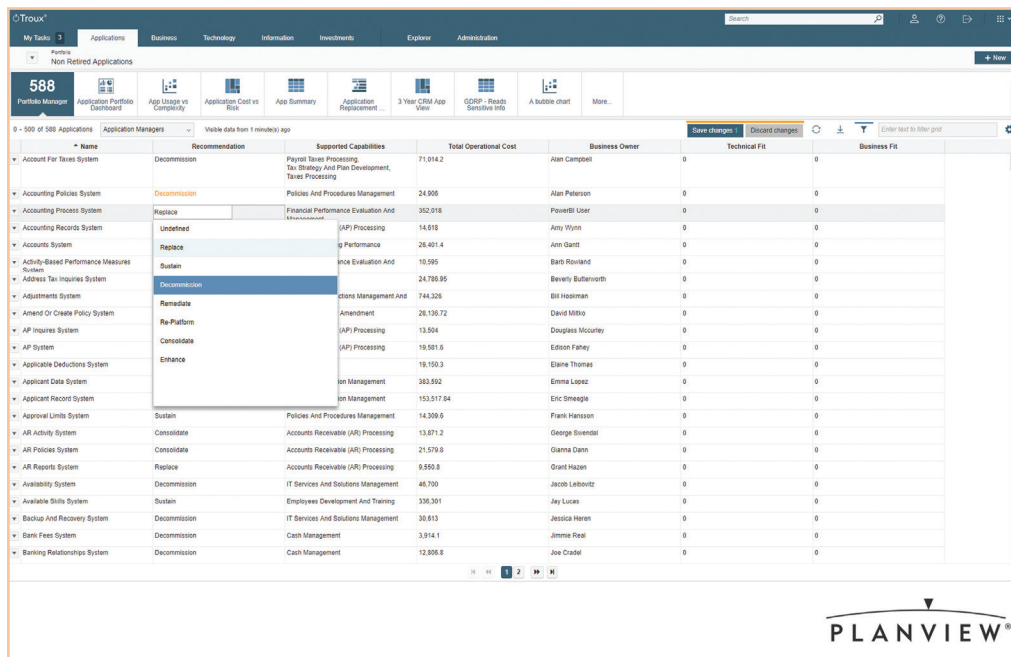
Click on a bubble on the chart and a box containing (configurable) KPI information about that application is displayed. The same KPIs data is shown in the information panel on the right.

Staying at the Application level, if you open the "Application Road Map" you see a Gantt style time-line report. On the left is a hierarchical capability list with the bars on the chart representing the lifecycle (planning, implementation, production and retirement) for each application within the capability. The purpose of this display is to show how long each service is required by the business.

Another view available is a dashboard, based on Microsoft SSRS (SQL Server Reporting Services) technology, that brings together several of the previously seen reports. Portfolio-based, it shows an aggregated cost view for the applications serving a capability. Also displayed is an Application Burn-down chart showing where costs are introduced into the portfolio with the introduction of new applications and where costs are removed by the decommissioning of others. A table below the Burn-down chart displays the actual figures involved. Whatever elements the dashboard is displaying, you can click on individual parts of each chart to drill down to a lower capability or application level.

Dashboards can be exported to Word, Excel, PowerPoint, PDF, TIFF, HTML, CSV and XML files.

Microsoft Power BI can access data feeds from Troux for people to define their own dashboards. There is an Appsource function above Microsoft Power BI containing an app called "Troux by Planview" containing a configured template dashboard. To use this function the organisation needs a separate Power BI licence from Microsoft (there is a free licensing tier available).

A typical application owner data collection screen

The software supports different maturity levels, allowing for fine documentation of the application landscape if required. It can manage assets such as functions, business processes, internal or external organisations (vendors, partners or people with access to specific systems), localities, and business products. All these entities can be subjected to similar portfolio analysis as are capabilities and applications.

An application can be broken down into its various modules if required. On a technology level, the entities that can be managed are software product versions, hardware product models and design patterns (a technology bundle of hardware and software).

The whole system sits above the ITIL but information from ITIL applications

can be imported into the system for reference and linked with the appropriate applications for the purpose of integrated reporting, for example, to provide a full impact analysis, starting with the capability level, then down to the application level, then down to the underlying technologies and finally, down to the individual service deployments.

Going to the "Technology" tab, the "Software Product Versions" report is another Gantt style chart that shows the duration of the availability of each version of the selected software application. This information is readily available from Planview which has an arrangement with BDNA, a company that maintains a catalogue of the versions of software that, at the time of writing contains information about 34,135 manufacturers, 625,426 software releases, 1,118,241 hardware models and 119,807,212 data points.

This information is also used in the "Application Landscape" report that shows the lifelines of the technology used in the organisation.

Going to the "Information" tab, you see a screen that shows what type of data each system uses. It doesn't show where the data comes from but this could be added if required. All of the data points are classified according to their confidentiality impact and their retention impact (customisable) so a data protection team may require a high level of detail which can be accommodated.

The software provides, out-of-the-box, a set of more than seventy reports. Many of these echo screens shown by the system. Given the appropriate rights to do so, the end users can edit these reports and create new ones within the system as required. To create a new report, you firstly select the tab on which the report is to be based (capability, applications, etc.). Selecting the type of visualisation needed, you decide whether the report is just for you or is to be shared with colleagues. You then choose the criteria and as you build the report it appears on the screen in real time. To filter the data you can use the portfolio tile to select an existing portfolio or you can create a new portfolio.

Planview Enterprise users may create a new IT project and this would then appear in Troux. The project owner would state the purpose of the project, linking it to the relevant application(s). This information will then be fed back to Planview Enterprise, where the linked applications would be shown as outcomes. Troux can also integrate with Clarity at a high level.

Since acquiring Troux, Planview has made some changes to Troux's user interface and reporting layers to bring its appearance more into line with Planview's own.

Work during the last quarter of this year will concentrate on making improvements to the application's integration ability and to increasing its functionality and the reporting system will be further enhanced in response to customer feedback. I'm told that Troux 15 may well be available by the time you read this review.

In the next release the company is working on a close integration with Microsoft Visio to enable visual modelling. Views will be published back to Troux and, eventually, data changes from Visio will also be reflected back into Troux.

A new visualisation type will be introduced - Node Diagrams - to visualise impact across all layers of the enterprise architecture.

How much does it cost?

Troux pricing is based on the number of users and currently ranges from £20 to £325 per month depending upon the user-type. All prices exclude VAT.

Right to Reply

Thank you, Steve, for your thorough review of Troux enterprise architecture software from Planview. Troux has been used by customers globally for more than fifteen years to connect technology with business context by helping stakeholders understand the dependencies between the organisation's application portfolio, the underlying technology stack, and business capabilities and products.

Troux version 14 features a new, redesigned portfolio-centric user experience with streamlined ribbon navigation, powerful visualisations, interactive grids, and a new reporting platform. This approach brings scale and business context to decision making, allowing enterprise architects to reach beyond the core team to engage stakeholders across the organisation.

Troux 14 also provides a new strategic planner user type that lets enterprise architects define roadmaps, develop and compare investment scenarios, and measure progress. Users benefit from the top-down approach of Planview Enterprise to connect strategies and investments with capabilities and the technology landscape in Troux.

With the General Data Protection Regulation (GDPR) deadline approaching, Troux can help businesses classify, track, and report on where data is stored and used. Leveraging the information captured supports GDPR compliance as well as cost and risk reduction.

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