Configuring Portfolios and Applications

Configuration

- UI Path : **Administration > Configuration > Portfolios**
- Permission : you must have the Global Permission "Administer System" to access this page

The Portfolios management interface allows you to configure both Portfolios and Applications. It is divided into two or three columns. On the left is the list of top-level Portfolios and Applications. If a Portfolio is chosen, two more columns will be shown: sub-Portfolios, and projects. If an Application is chosen, only the projects column will be available.

From here, you can edit or delete an existing Portfolio or Application, or create a new one.

Creating

Use the "Create" button at the top-left of the interface to open the creation dialog. You're required to provide a name. You can optionally specify a description and key. Visibility defaults to Public, but Private may be chosen. Private Portfolios and Applications are only visible to those explicitly granted the right.

Populating

Once your Portfolio exists, you can populate it with any mix of projects, Applications, and sub-portfolios. Applications may only be populated with projects.

Adding a Sub-portfolio

To add a sub-portfolio, click on "Add Portfolio" at the top of the third column, and choose:

- Standard - This option allows you to create a new sub-Portfolio from scratch. Once created, you can add projects, applications, and more layers of sub-portfolios.
- Local Reference - This option allows you to reference an existing Portfolio/Application as a sub-portfolio. Once added, it is not editable here, but must be chosen in the left-most column to be edited.

Adding Projects

To add projects directly to a Portfolio or standard sub-Portfolio, first select the Portfolio in the left column, and the sub-Portfolio (if necessary) in the middle column.
There are four project selection modes:

- Manual – choose the projects individually.
- Manual Measure – choose a Manual Measure (text measures only) and set the value projects should have for that metric to be included in this Portfolio.
- Regular Expression – specify a regular expression and projects with a matching name OR key will be included.
- All Remaining Projects – choose this option to add all projects not already included in this Portfolio (directly or via sub-Portfolio).

> (i) **Project unicity under a portfolio**
>
> Projects, applications and sub-portfolios can only appear once in any given hierarchy in order to avoid magnifying their impacts on aggregated ratings. The portfolio configuration interface has some logic to prevent obvious duplications (e.g. manually adding the same project), however in case of more subtle duplications (e.g. due to regex, or other bulk definition), then the calculation of that portfolio will fail with a helpful error message.

Calculation

Calculation must be triggered manually each time a Portfolio structure is modified. Portfolios should also be recomputed on a regular basis to keep them up to date with the most recent project quality snapshots. Portfolio are computed with the SonarQube Scanner.

To compute all your Portfolio, run the following command (credentials from a user with "Administer System" or "Execute Analysis" permission is required):

```
sonar-scanner views -Dsonar.login=<token>
or
sonar-scanner views -Dsonar.login=<login> -Dsonar.password=<pwd>
```

After Computation

When you launch the Computation, the real work is done on SonarQube Server side.
For each Portfolio, a "Background Task" is created and you can follow the progress on each in the **Administration > Projects > [Background Tasks](#)** by looking at the Logs available for each Portfolio.