CA Clarity™ PPM

Connector for CA Unicenter Asset Portfolio Management Product Guide - On Premise

Service Pack 02.0.02



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CA Technologies Product References

This document references the following CA Technologies products:

- CA Technologies Unicenter® Asset Portfolio Management

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Chapter 1: About the CA Unicenter Asset Portfolio Management (APM) Connector

CA Technologies Unicenter® Asset Portfolio Management (Unicenter APM) reduces costs and increases efficiency by managing the life cycle of assets, from planning and requisitioning technology to retirement and disposal. You can use Unicenter APM to manage IT assets and resources as they relate to vendors, contracts, and the financial impact on the organization.

You can import asset data from CA Technologies Unicenter APM into CA Clarity PPM using the CA Clarity PPM Connector for CA Technologies Unicenter APM add-in. This integration allows you to manage the total cost of ownership of investments, services, and portfolios. Assets remain centrally managed while detailed financial information is integrated into the existing CA Clarity PPM views through cost plans.

Chapter 2: Setting Up and Installing the CA Unicenter Asset Portfolio Management (APM) Connector

This section contains the following topics:

How to Set up the CA Clarity PPM Connector for CA Unicenter APM Add-in (see page 9)
Install the CA Clarity PPM Connector for CA Unicenter APM Add-in (see page 10)

How to Set up the CA Clarity PPM Connector for CA Unicenter APM Add-in

The following steps describe how to set up the CA Clarity PPM Connector for CA Technologies Unicenter APM add-in:

1. Install the required CA Unicenter APM software patches (see page 9).
2. Install the add-in (see page 10).
3. Verify the Import Unicenter APM Assets process (see page 11).
4. Run the process or schedule the process to run on a schedule.

Install the CA Unicenter APM Software Patches

Install the following CA Unicenter APM software patches:

- T 4B5051

  Allows Unicenter APM to work with CA Clarity PPM.

- T 333100

  Contains the instructions for the software patch.

Note: CA Unicenter APM expertise is required to install the patches. Contact CA Unicenter APM technical support for assistance.

Install the CA Clarity PPM Connector for CA Unicenter APM Add-in

This section describes the steps for installing the CA Clarity PPM Connector for CA Unicenter APM add-in.

CA Clarity PPM Connector for CA Unicenter APM Installation Prerequisites

The CA Clarity PPM Connector for CA Unicenter APM is validated to work with CA Unicenter APM r11.3.4 GA. These steps outline the product installation for CA Clarity PPM Release 13.2.

Upgrade to Universes with New Security (add-ins with reports)

The universes and stock reports are stored in the Business Intelligence Archive Resource (BIAR) file included with the add-in. If your company takes advantage of the Business Objects reporting security model, import the BIAR file using the Business Objects Import Wizard. Repeat the steps you used for importing the CA Clarity PPM universe and stock report information to import the BIAR file for the add-in.

Install the Add-in

Install the add-in. For instructions, search *Installation*.

Activate Charge Codes

Activate the following charge codes after the add-in installation:

- UAPM Lease
- UAPM License Fee
- UAPM Support
- UAPM Maintenance

Follow these steps:

1. Log in to CA Clarity PPM.
2. Open Administration, and click Charge Codes.
3. Select No for Open for Time Entry.
4. Select the Charge Codes and click Open.

   The charge codes are activated.

Verify Import Unicenter APM Assets Process

After installing the Unicenter APM add-in, verify that the Import UAPM Assets are created.

For more information, search *Administration*.

Follow these steps:

1. Open Administration, and from Data Administration, click Processes.
2. Verify that the Import UAPM Assets process is listed.

Custom Scripts to Import Asset Data

You can create a custom script to import selected CA Technologies Unicenter APM asset data into CA Clarity PPM.

The custom script parameters will be created as part of the process. You can enter values for the custom script parameters.

Follow these steps:

1. Open Administration, and from Data Administration, click Processes.
2. Click the Import Unicenter APM Assets process to open it.
3. Click Steps from the content menu.
4. Click Asset Properties Import in the Group > Steps column.
5. In the Actions section, click Perform Asset Import.
6. Click Custom Script Parameters from the content menu.
7. Complete the following fields:

   XOG_Username

   Defines the CA Clarity PPM user name for invoking the XOG web service for creating cost plans.

   XOG_Password

   Defines the CA Clarity PPM password for the XOG user.

   UAPM_UserName

   Defines the user name used to gain access to Unicenter APM.

   UAPM_Password

   Defines the password used to gain access to Unicenter APM.

   UAPM_Web_Service_URL

   Defines the URL where Unicenter APM can be located on the web.

   UAPM_Assetid

   Enter a Unicenter APM asset ID if you are importing data on a specific Unicenter APM asset.

   UAPM_Asset_Type, UAPM_Asset_Class, UAPM_Asset_SubClass, UAPM_Asset_Keyword, UAPM_Asset_CostType, UAPM_Asset_Status

   Defines the refined search attributes for Unicenter APM asset data to import into CA Clarity PPM. If no filter value is entered for the field, enter an asterisk in the field.

   Clarity_Manager_User_Name

Defines the name of the financial manager for the cost plan. If costs are being imported from Unicenter APM, the cost plan uses the information. When the asset is imported into CA Clarity PPM, the Manager attribute is set to this login ID.

Clarity_Status

Defines the CA Clarity PPM status for the imported asset. For example, to set the status to "Unapproved" initially. You can perform necessary action on the cost plan before moving the status to "Approved".

Threshold_Import_Date

Indicates the cutoff date for importing records. Only Unicenter APM records (Asset properties and Asset cost records) that have update dates greater than or equal to the date entered in this field are imported. If the Unicenter APM Asset cost record update date is greater than the threshold date but the Asset properties record update date is not, the Asset properties data is still imported. You cannot import asset cost records without importing the asset properties data.

Do_Full_Import

Defines whether to import asset data fully or partially.

Values:

- True. The Unicenter APM asset data is fully imported. The Threshold_Import_Date value is ignored.
- False. Only data that has changed as the last import is imported.

Clarity_Entity

Defines the CA Clarity PPM entity name that the cost plan uses.

Note: The CA Unicenter APM Connector works as expected with CA Clarity PPM Release 13.1 only if the XOG URL port is equal to 80.

8. Save your changes.

Define Selection Criteria for Filtering Unicenter APM Assets

You can use the following parameters as selection criteria to filter Unicenter APM assets to import into CA Clarity PPM:

- Status (UAPM_Asset_Status)
- Type (UAPM_Asset_Type)
- Class (UAPM_Asset_Class)
- Sub-class (UAPM_Asset_SubClass)
- Keyword (UAPM_Asset_Keyword)
- Cost type (UAPM_Asset_CostType)

The following parameters define the CA Clarity PPM Properties Default when you import new assets from Unicenter APM:

- CA Clarity PPM manager ID (Clarity_Manager_User_Name)
- CA Clarity PPM status (Clarity_Status). **Default:** "Approved"
- CA Clarity PPM entity (required when importing cost data)

Chapter 3: Importing Asset Data from CA Unicenter Asset Portfolio Management (APM) into CA Clarity PPM

This section contains the following topics:

Import Asset Data (see page 15)
Import Asset Cost Data (see page 16)
Delete Assets from Unicenter APM and CA Clarity PPM (see page 20)

Import Asset Data

You can import asset data into CA Clarity PPM by scheduling the Import Unicenter APM Assets Process to run at regular intervals. You can import manually, or by running the Execute a Process job in CA Clarity PPM. This job is scheduled in CA Clarity PPM and runs at regular intervals. It downloads and transfers asset data from CA Technologies Unicenter APM and inserts them as cost plans into CA Clarity PPM.

Where you view the results depends on how you set up the Import Unicenter APM Assets Process.

For more information, see the *Administration Guide*.

Import Asset Cost Data

CA Technologies Unicenter APM allows for multiple cost records for each asset. You can import recurring cost data, such as the simple and details budgets, from CA Technologies Unicenter APM into CA Clarity PPM. This data provides better insight on assets and forecast costs when creating budgets.

Before you import asset cost data from CA Technologies Unicenter APM, make sure the following is set up:

Begin Date

Defines the initial date the cost is incurred.

Total Amount

Defines the cost that is applied at every recurring period.

Recurring Period

Defines the period that is used to determine the recurring charges (Days, Months, Years).

Recurring Unit

Defines the unit that is used to determine the recurring charges (Days, Months, Years).

Note: Days are not supported as a recurring unit.

Termination Date

Defines the date the recurring charges stop.

Note: It is assumed that CA Technologies Unicenter APM cost records do not contain overlapping Begin and Termination dates.

Import Detail Budget Data

The cost type is used to import the current cost record. The following CA Technologies Unicenter APM cost types are imported into CA Clarity PPM:

- Lease
- Support
- Maintenance
- License Fee

The Begin Date and the Termination Date determine the current cost record. You should import, at most, four cost records per asset (one record for each of the cost types). You can configure the cost types you want to import.

Note: The connector supports only yearly and monthly recurring units in CA Technologies Unicenter APM. CA Technologies Unicenter APM cost records with recurring units in days are ignored.

The session date is recorded when a connection between CA Technologies Unicenter APM and CA Clarity PPM completes successfully. During the connection, the connector checks the DateStamp field for each cost record for each asset. If the field is greater than the last import session date, the connector recalculates Total Forecast Cost and imports the new costs values.

Cost Plans

When you import assets from CA Technologies Unicenter APM into CA Clarity PPM, a cost plan called UAPM Cost is created. This becomes the cost plan of record for the imported asset. In order not to import cost plan data for assets, leave the UAPM_Asset_CostType parameter blank.

Important! Define an entity in CA Clarity PPM before you start the import process. Cost plans require an associated entity.

When the cost plan is created for new assets, a cost plan line item is created for each cost record in CA Technologies Unicenter APM. This cost plan line item is based on the CA Clarity PPM charge code that is mapped to the CA Technologies Unicenter APM cost type. The cost plan line item is marked as external, indicating to CA Clarity PPM that the source of this data is from a third-party system. You cannot edit these cost plan line items.

Cost Records

When you import cost records from CA Technologies Unicenter APM into CA Clarity PPM, a cost plan line item is created in the cost plan. The name of the cost record is the name of the cost plan line item in CA Clarity PPM.

When you update a CA Technologies Unicenter APM cost record, they are imported into CA Clarity PPM on the next run of the Import Unicenter APM Assets process. The changes to the cost record overwrite the corresponding cost plan line item in CA Clarity PPM.

Deleting Cost Records

You cannot delete Unicenter APM cost records from CA Clarity PPM. When you delete a cost record in Unicenter APM, delete manually the corresponding cost plan in CA Clarity PPM.

Fiscal Time Periods for Imported Cost Data

When you import cost data from CA Technologies Unicenter APM into CA Clarity PPM, the cost is inserted using a monthly fiscal time period defined for the entity. The date of the costs from CA Technologies Unicenter APM must fall within the span of the fiscal time periods. If the cost plan is set up with a fiscal period other than monthly, the cost data is not imported.

You must apply the Total Amount value from CA Technologies Unicenter APM to each monthly fiscal time periods cell between the Begin Date and Termination Date within the CA Clarity PPM cost plan line item.

Example

Begin Date = 1/1/11

Termination Date = 12/31/14

Unicenter APM Quantity = 10

Recurring Period = 1 per Month

Total Amount = $100

Number of Periods = 12

The CA Technologies Unicenter APM cost values are applied to the cost plan line items of the cost plan of record.

If the Recurring Period is 1 per Year, the monthly cost plan line item is inserted in CA Clarity PPM, but the value entered is based on the begin date and the termination date. The following values in the cost plan line item appear on the Plan Detail page:

Begin Date=1/1/11

Termination Date=12/31/14

Unicenter APM Quantity=1

Recurring Period= 1 per Year

Total Amount=$10000

Number of Periods=4

The yearly values are entered based on the month of the begin date (1/1/11). A cost value of 10000 is also entered for the following fiscal time periods:

- 1/12
- 1/13
- 1/14

Delete Assets from Unicenter APM and CA Clarity PPM

In Unicenter APM, assets are usually retired rather than deleted. You require developing a manual business process to resolve the deletion of assets within CA Clarity PPM when you retire the assets in Unicenter APM.

Appendix A: CA Unicenter APM to CA Clarity PPM Field Mapping

When you import an asset from Unicenter APM into CA Clarity PPM, the following Unicenter APM fields are mapped and saved as fields in CA Clarity PPM:

Unicenter APM Field	CA Clarity PPM Field	Comments
Name	Name	
Serial Number	ID	The Unicenter APM Serial Number field is used as the ID within CA Clarity PPM.
Alias	Description	The Unicenter APM Alias is the user-friendly name for the asset.
Status	UAPM Status*	A new field within CA Clarity PPM. In Unicenter APM, the field represents status history.
Status Date	UAPM Status Date*	The date when the status changed
Active	Active	Identifies whether an asset is active or not.

* These CA Clarity PPM fields only display for assets if you have configured the view or page to display them.

For more information, see the Studio Developer documentation.

The changes you make to the Unicenter APM field values causes updates to the corresponding fields in CA Clarity PPM assets.

Both "Active" and "Inactive" states are queried in Unicenter APM. You can configure the settings in the Import Unicenter APM Assets process to define the state imported.