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CA Product References

This document references the following CA products:

■ CA Unicenter® Asset Portfolio Management

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**Appendix A: Field Mappings**

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Chapter 1: CA Clarity PPM Connector for CA Unicenter APM Overview

This section contains the following topics:

About CA Clarity PPM Connector for CA Unicenter APM (see page 7)

About CA Clarity PPM Connector for CA Unicenter APM

CA 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 Unicenter APM into CA Clarity PPM using the CA Clarity PPM Connector for CA 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: Setup and Installation

This section contains the following topics:
How to Set up the CA Clarity PPM Connector for CA Unicenter APM Add-in (see page 9)

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

The following steps describe the overall process of setting up the CA Clarity PPM Connector for CA Unicenter APM add-in:
1. Install the required CA Unicenter APM software patches. (see page 9)
2. Install the add-in. (see page 9)
3. Create the Import Unicenter APM Assets Process. (see page 10)
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 485051
  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.
Create the Import Unicenter APM Assets Process

When you create the Unicenter APM import process, you can set the parameters that determine the Unicenter APM assets imported and where the assets appear in CA Clarity PPM.

See the Administration Guide for more information.

Follow these steps:
1. Open Administration.
   The administration home page appears.
2. Open the Data Administration menu and click Processes.
   The list page appears.
3. Click New.
   The properties page appears.
4. Complete the following fields:
   - **Process Name**
     Defines the name for the new process.
     **Example:** Import Unicenter APM Assets.
   - **Process ID**
     Defines the unique ID for the process.
   - **Content Source**
     Specifies the content source for the process.
5. Complete the other fields and save.
Create Custom Scripts to Import Asset Data

You can create a custom script to import selected CA Unicenter APM asset data into CA Clarity PPM. This procedure explains how to create a custom script for a process to import Unicenter APM asset data.

After creating the custom script in the process, check the custom script to ensure that the specified values appear.

Follow these steps:

1. Open the Administration Tool.
   The administration home page.
2. Open the Data Administration menu and click Processes.
   The list page appears.
3. Click the name for the Import Unicenter APM Assets Process to open it.
   The properties page appears.
4. Click Steps from the content menu.
   The steps page appears.
5. Click Asset Properties Import in the Group > Steps column.
   The details page appears.
6. In the Actions section, click Perform Asset Import.
   The properties page appears.
7. Click Custom Script Parameters from the content menu.
   The parameters page appears.
8. 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 a 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 do a full or partial import of asset data.

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 v13.0 only if the XOG URL port is equal to 80.

9. Save the changes.
Define Selection Criteria for Filtering Unicenter APM Assets

You can use the following parameters as selection criteria to filter CA 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 are used to define the CA Clarity PPM Properties Default when you import new assets from CA 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: Import Asset Data 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 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.

See the Administration Guide for more information.
**Import Asset Cost Data**

CA 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 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 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 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 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 Unicenter APM. CA Unicenter APM cost records with recurring units in days are ignored.

The session date is recorded when a connection between CA 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 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 Unicenter APM. This cost plan line item is based on the CA Clarity PPM charge code that is mapped to the CA 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 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 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 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 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 require applying the Total Amount value from CA 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.

For 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 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.
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:

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

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

See the *Studio Developer’s Guide* for more information.

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.