



Cloud Assessment

Software Version: 1.01

Windows and Linux Operating System

User Guide

Document Release Date: January 2018

Software Release Date: January 2018

Legal notices

Warranty

The only warranties for Seattle SpinCo, Inc. and its subsidiaries (“Seattle”) products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. Seattle shall not be liable for technical or editorial errors or omissions contained herein. The information contained herein is subject to change without notice.

Restricted rights legend

Confidential computer software. Except as specifically indicated, valid license from Seattle required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor’s standard commercial license.

Copyright notice

© Copyright 2017 EntIT Software LLC, a Micro Focus company.

Trademark notices

Adobe™ is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To verify you are using the most recent edition of a document, go to <https://softwaresupport.hpe.com/manuals>.

To check for new versions of software, go to <https://www.hpe.com/software/entitlements>. To check for recent software patches, go to <https://softwaresupport.hpe.com/patches>.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your Micro Focus sales representative for details.

For information and details about the products, services, and support that Micro Focus offers, contact your Client Director.

Support

Visit the Micro Focus Software Support Online web site at <https://software.microfocus.com/en-us/software/customer-technical-support-services>.

This web site provides contact information and details about the products, services, and support that Micro Focus offers.

Micro Focus online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Manage software licenses
- Download new versions of software or software patches
- Access product documentation

- Manage support contracts
- Look up Micro Focus support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require you to register as a Passport user and sign in. Many also require a support contract.

To register for a Passport ID, go to <https://cf.passport.softwaregrp.com/hppcf/login.do>.

To find more information about access levels, go to <https://softwaresupport.hpe.com/web/softwaresupport/access-levels>.

To check for recent updates or to verify that you are using the most recent edition of a document, contact your Client Director.

Contents

Chapter 1: Get Started	7
Chapter 2: Catalog	8
Catalog Browser	9
Creating Artifacts	11
Domain Visualization	15
Searching for Artifacts	16
Artifact View Page	19
Overview Tab	20
Documentation Tab	22
Cloud Transformation Tab	24
Financial Profile Tab	27
Tree View Tab	28
Lifecycle Tab	29
Compliance Tab	30
Access Rights Tab	31
History Tab	31
Events Tab	32
Contacts Tab	33
Relationships Tab	33
Relationship Editor	34
Understanding Relationship Types	34
Using Relationships Editor	36
Adding an Artifact Relationship	37
Removing an Artifact Relationship	40
Adding and Removing a Shortcut	41
Non-Compliant Relationships	42
Chapter 3: Navigator	44
Chapter 4: Reports	45
Report Dashboard	45
Archimate Introductory Viewpoint	45
Policy Radar Report	46
Adding a Portlet to Your Dashboard	47
Printing Portlet Content	47
Artifact Reports	48
Viewing Artifact Reports	49
Policy Reports	50
Viewing Policy Reports	51
Archimate Compliance Report Structure	52
Heat Map Reports	53
Structure Map Reports	54
Custom BIRT Reports	55

Project Roadmap Reports	55
Lifecycle Plan Roadmap Report	56
Cloud Transformation Reports	56
Chapter 5: Enterprise Architecture	59
Creating Proposal	61
Creating Project from Proposal	64
Setting Target Architecture	65
Setting Efforts of Architecture Changes	67
Monitoring Architecture Changes	67
Chapter 6: Cloud Transformation	69
Accessing from Micro Focus HCM (Cloud Service Automation)	69
Cloud Transformation Guide	69
Estimating Cost of Deployment	71
Service Design Publishing	75
Publishing Example Diagrams	86
Chapter 7: Surveys	93
Understanding Survey Definition	93
Starting New Survey	94
Undertaking the Survey	96
Keeping Track of Survey	98
Reviewing Answers	99
Taking a Self-Assessment Survey	100
Monitoring and Managing Survey	102
Chapter 8: Collaboration	104
How to Use Comments	105
How to Use Notifications	106
How to Use Events	107
How to Use Tasks	109
How to Use Ratings	110
How to Use Feeds	111
How to Share Artifacts	113
Chapter 9: Excel/CSV File Export and Import	116
Exporting CSV Files	116
Importing Spreadsheet Files	118
Managing Template	120
Spreadsheet Template Options	124
Chapter 10: Extension for Sparx Systems EA	126
Installing Extension for Sparx Systems EA	126
Uninstalling Extension for Sparx Systems EA	127
Connecting Extension for Sparx Systems EA to Cloud Assessment	128
Synchronize Data Between SparX Systems EA and Cloud Assessment	130
Scheduling Automatic Synchronization	133
Basic Modeling with Sparx Systems EA	134
Building Reference Model for Cloud Transformation	138

Synchronizing Deleted Artifacts	140
Element/Diagram Locking	142
Diagram Synchronization	144

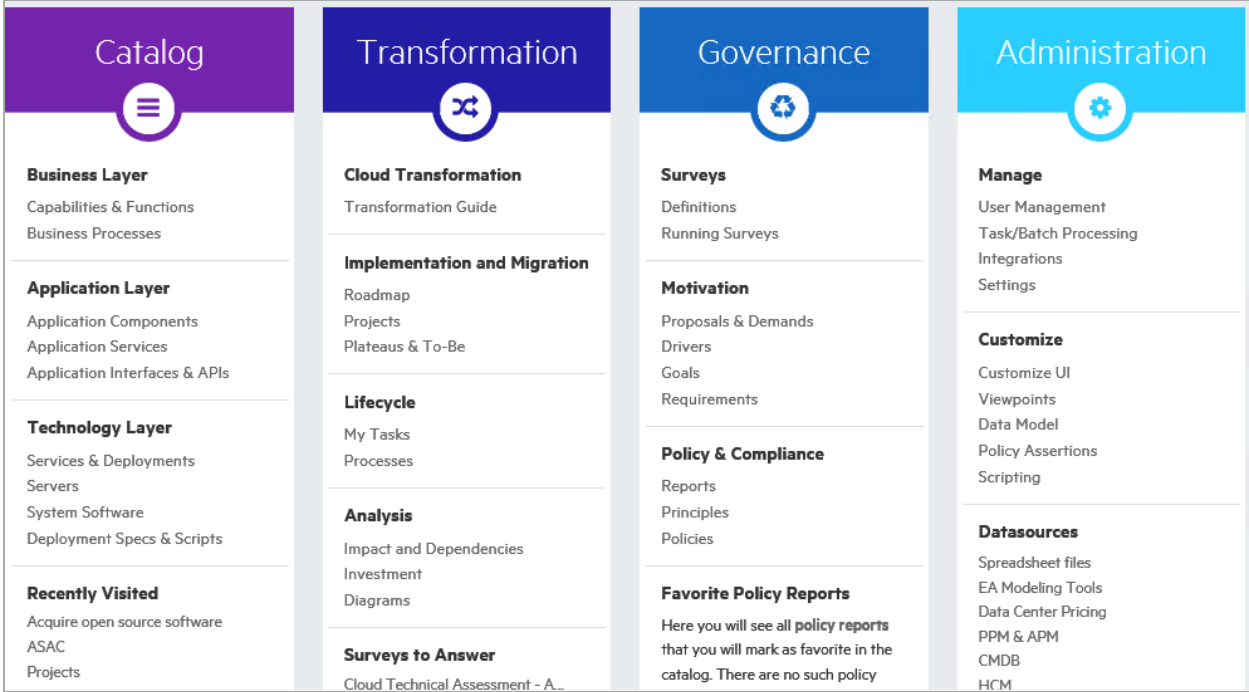
Chapter 1: Get Started

Micro Focus Cloud Assessment helps you centralize the enterprise infrastructure. This guide describes the key features and their inter-dependencies. It covers the following topics:

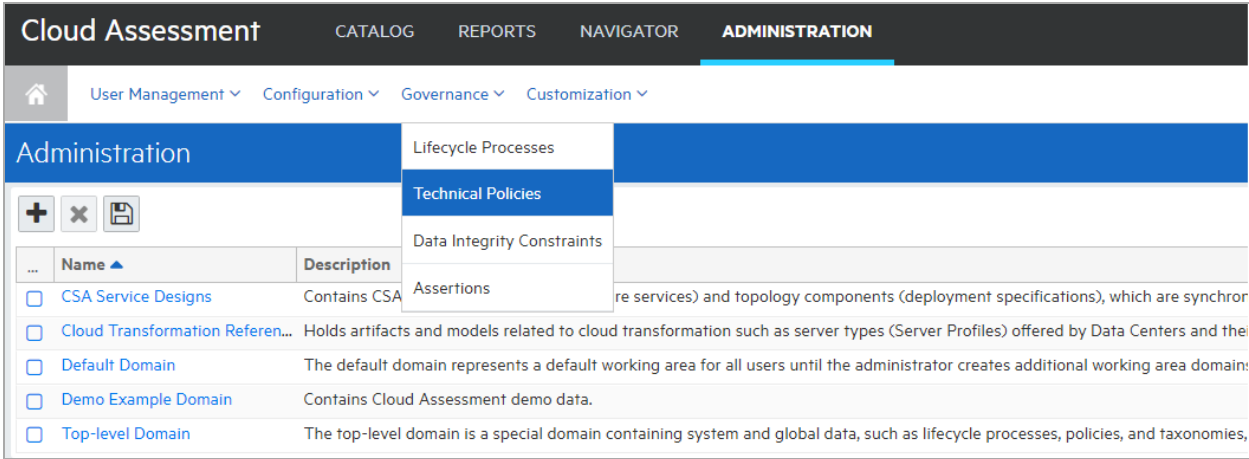
Feature	Description
Catalog , on page 8	Explains how to create, edit, view artifacts and their relationships, and search for artifacts.
Navigator , on page 44	Explains how to view related artifacts in graphical mode.
Reports , on page 45	Explains how to view, print reports and customize the dashboard.
Enterprise Architecture , on page 59	Explains how to use architecture management to manage architecture changes.
Cloud Transformation , on page 69	Explains how to use Cloud transformation UI to manage applications' migration into Cloud.
Surveys , on page 93	Explains how to start, undertake, manage and monitor surveys.
Collaboration , on page 104	Explains how to add comments, ratings, notify other contacts, share artifacts (provide access to others), complete assigned tasks and view artifact feeds and events.
Excel/CSV File Export and Import , on page 116	Explains how to export and import spreadsheet data.
Extension for Sparx Systems EA , on page 126	Explains how to use the Extension for Sparx Systems EA.

Chapter 2: Catalog

The Micro Focus Cloud Assessment Catalog tab home page starts you off with a set of panels which present the most common managerial functions. You can quickly jump to the desired UI by clicking the links on these panels.



However, these functions are also available from the main menu under their respective tabs. For example: Policies link under Governance panel is available in **Administration tab > Governance > Technical Policies** menu.

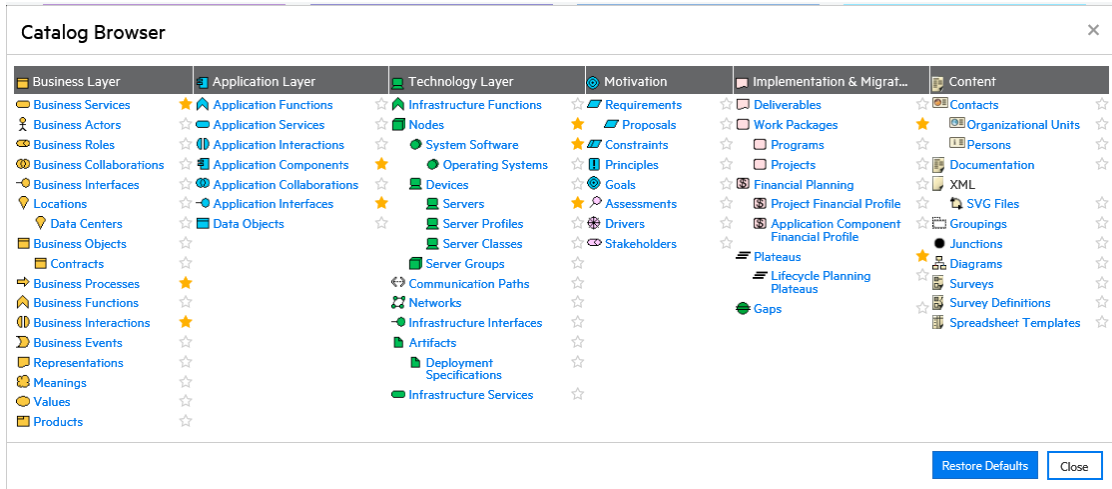


NOTE:
However, Administration panel is only visible to administrators.

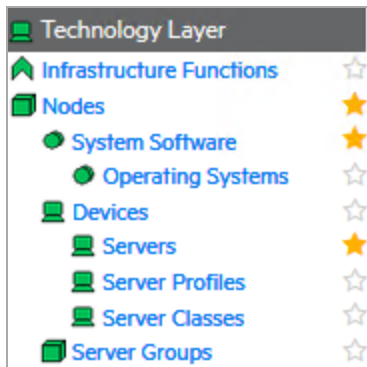
Catalog Browser

The Cloud Assessment catalog browser is the place for viewing artifacts by artifact collection type and Archimate model layer.

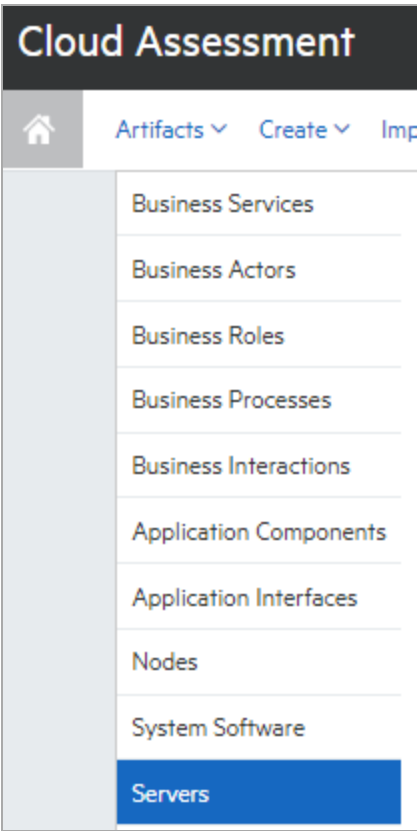
1. To open the catalog browser, click **Catalog > Artifacts > Show More**.



2. To open a collection of artifacts, click the type of artifact that you want to view. In this example, click **Servers** under the Technology Layer. It will appear under the artifacts as in below image:



TIP:
 You can pin the Server artifact collection to your Artifact menu, by clicking the Pin next to the Server collection. Pinning a collection makes it quick and easy to select.



- After you select the artifact collection you want to view, the collection page opens. In the sample below, the Server collection is displayed.

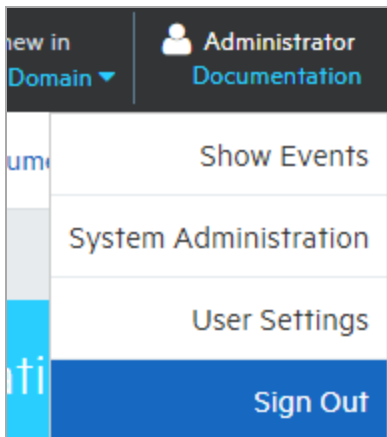
Servers		All	Located in:	All Non-Reference	Filter
<input type="checkbox"/>	Name	Version	Alias	Server Type	Domain
<input type="checkbox"/>	2k332ddmidev	Service Pack 2		Virtual	Demo Example Domain
<input type="checkbox"/>	alluk	5.2.3790		Virtual	Demo Example Domain
<input type="checkbox"/>	almond	8.11.23 U		Virtual	Demo Example Domain
<input type="checkbox"/>	ambae	5.2.3790		Virtual	Demo Example Domain
<input type="checkbox"/>	anasser	1.0		Virtual	Demo Example Domain
<input type="checkbox"/>	ap100vm6.c0a.com	1.0		Virtual	Demo Example Domain
<input type="checkbox"/>	ap101vm7.c0a.com	1.0		Virtual	Demo Example Domain
<input type="checkbox"/>	ap102vm0.c0a.com	1.0		Virtual	Demo Example Domain
<input type="checkbox"/>	ap103vm1.c0a.com	1.0		Virtual	Demo Example Domain
<input type="checkbox"/>	ap104vm2.c0a.com	1.0		Virtual	Demo Example Domain

Page 1 of 93 | Hide descriptions | Change Page Size

- 4. To customize your view, you can sort, filter, and manage columns.

NOTE:
Column filters are not visible if all artifacts are shown on a single page.

- 5. You can use controls at the bottom of the collection page to control the page size and amount of description displayed. Revised page sizes are stored. To reset, go to **User Settings** menu on the top right, under the user name.



- 6. To perform bulk operations on artifacts in the collection, you can use the toolbar at the top of the collection page.



- 7. You can set up custom filters, such as a filter for favorite artifacts or artifacts that you own.

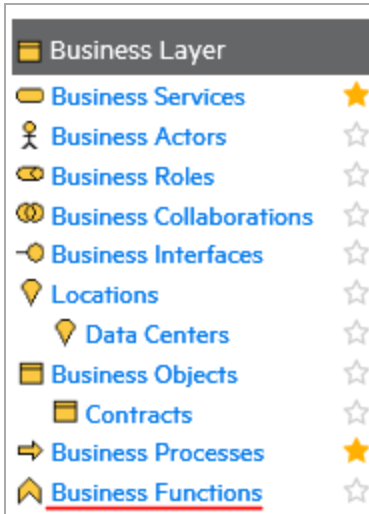
A screenshot of a search criteria form. The title is 'Specify your own search criteria using the form below.' Below the title is a text input field with the placeholder 'Enter text to search ...'. Underneath are two rows of filters: 'Keywords:' with a text input and a dropdown arrow, and 'Last modified:' with a text input containing 'Any Time' and a dropdown arrow. At the bottom are three buttons: 'Add Criteria', 'Search', and 'Clear'.

Creating Artifacts

You can use Cloud Assessment to create new artifacts, and the attributes and relationships that impact those artifacts.

To create a new artifact:

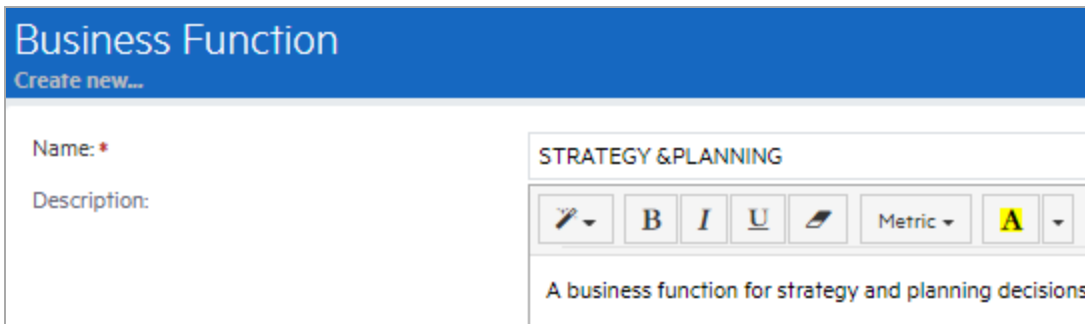
- 1. Click **Catalog > Create > Show More** to open the catalog browser Create Artifact window.
- 2. Select the artifact type that you want to create. The new artifact opens. In this example, select the **Business Function** artifact on the Business Layer.



3. Or you can click the **Open create dialog for this artifact** icon on Business Function collection page to create a new artifact.



4. Enter the name of your new artifact. You can optionally add a **Description**, select a **Status**, **Investment Priority**, or **Type**.



5. In the Documentation area, you can attach or link to any associated documentation. Documents that you load are viewable on the Documentation tab.



6. To add documentation from an existing artifact, click the **Add an existing artifact** icon. The Select Artifact window displays a list of documentation artifacts to choose from.

Select Artifacts ✕

Artifact Type: < Any > v
Keywords: v

Add Criteria
Search
Clear

		Name ▲	Artifact Type	Version
<input type="checkbox"/>	☆	FinPlanner BR.docx	Documentation	1.0
<input type="checkbox"/>	☆	FinPlanner HLD.docx	Documentation	1.0
<input type="checkbox"/>	☆	FinPlanner_SD.docx	Documentation	1.0
<input type="checkbox"/>	☆	setupContext.xml	Documentation	1.0

Add
Cancel

7. To add a link to documentation from a web resource, click the **Link a Web Resource** icon. The Add Document Reference window opens and you can use it to enter the document URL, the document type, and any text or keywords that you want to appear with the link.

Add Document Reference ✕

Document URL

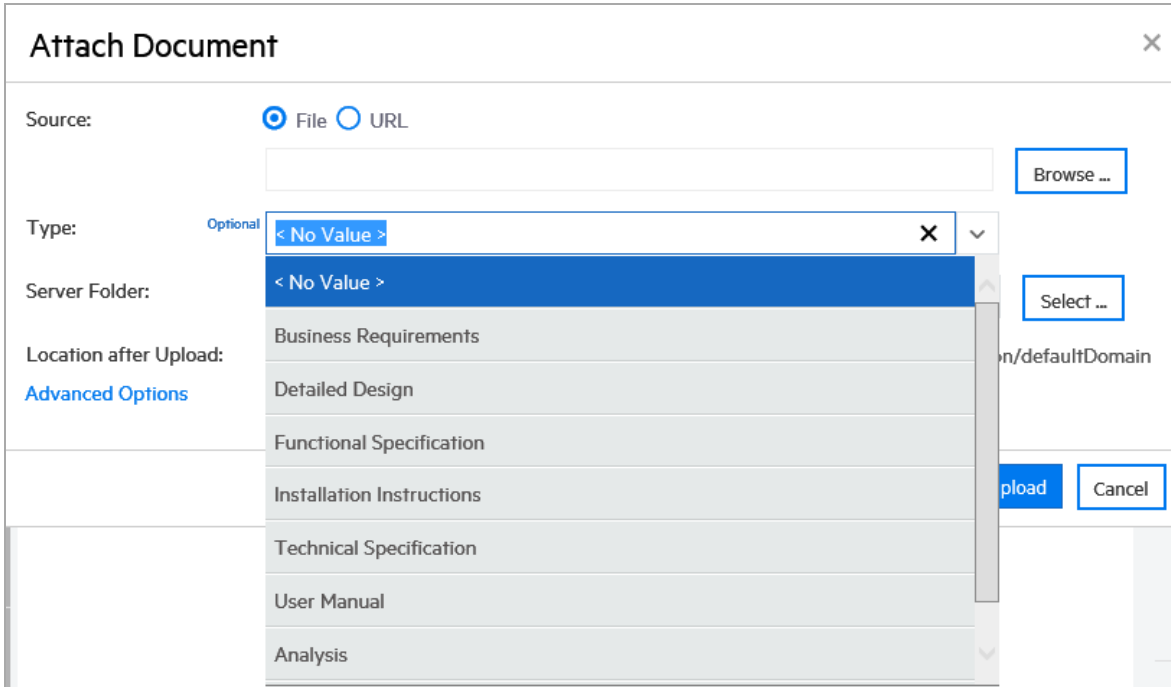
Type Optional < No Value > v

Link Text

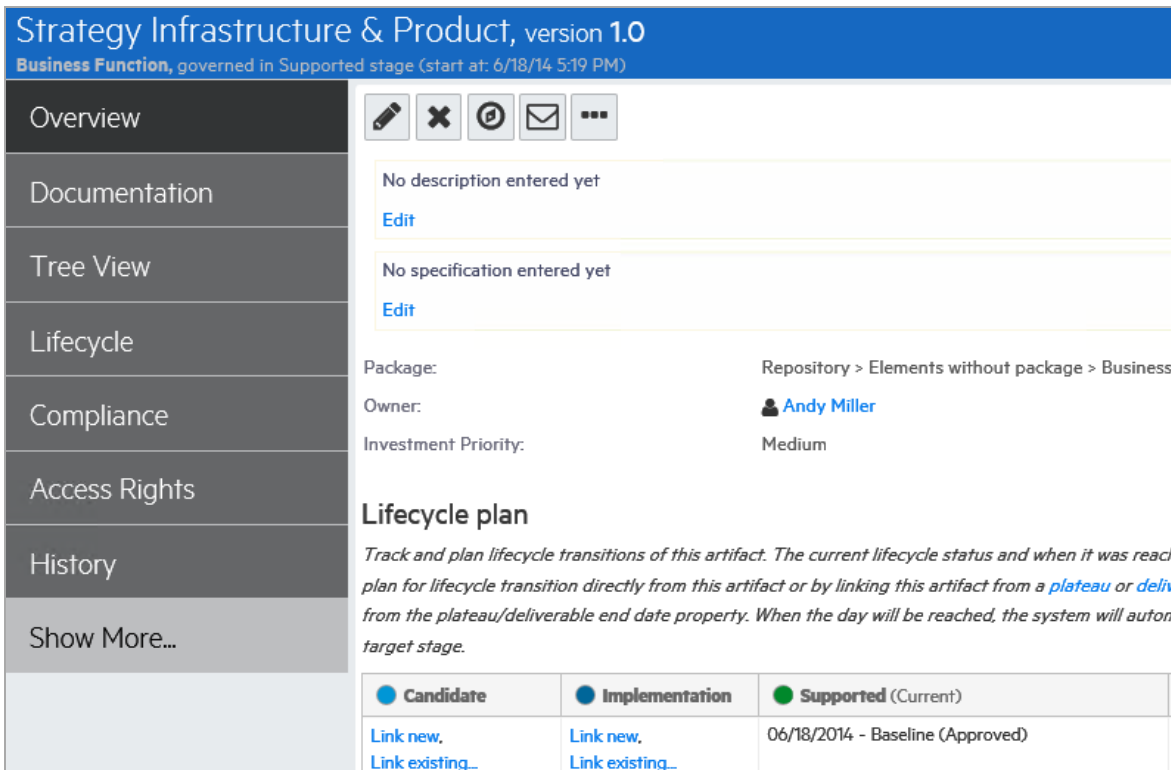
Advanced Options

Add
Cancel

8. To attach a documentation artifact directly, click the **Upload a Local File to the repository** icon. The Attach Document window opens and you can use it to enter the document source location, the document type, the server folder, and the location where the document should reside after upload, as well as keywords that you want to enable so that users can find the document. In this example, the document types are shown.

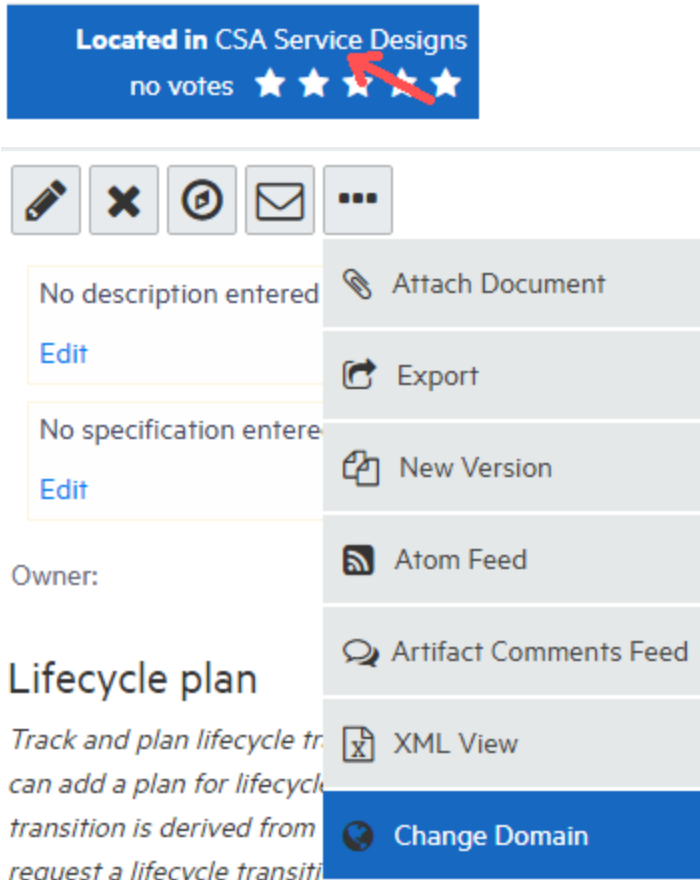


9. Click **Save** to save the new artifact that you created. Your new artifact record is displayed and you can add or modify attributes and relationships using the tabs. Documentation artifacts are shown on the Documentation tab.



Domain Visualization

Cloud Assessment enables you to create or import artifacts in your working domain in which the artifacts are created or imported. Click **Located in <domain>** and select the working domain. You can click the domain name and change if required as depicted in the 2 images below.



To switch the working domain, click **Create new in <domain>** in Cloud Assessment header and select from the list. Thereafter, the artifacts are created or imported in the new working domain.



When you view artifacts through reports menu tab, the **Show data in <domain>** indicates the domains where artifacts are queried from. The selected domains are personalized for each user and are retained across Catalog collections, Navigator and Reports UI.



The data in **Show data in <domain>** is displayed as follows:

- **All Non-reference**
If As-is/To-be Architecture and Demo Data domain types are selected. This is the default domain (i.e. excluding Reference Model domains).
- **All Reference Models**
If Reference Model domain type is selected.
- **All Architecture Domains**
If As-is/To-be Architecture domain type is selected
- **All Demo Data Domains**
If Demo Data domain type is selected
- **All Domains**
If As-is/To-be Architecture, Demo Data and Reference Model domain types are selected.
- **All Reference Architecture Domains**
If As-is/To-be Architecture and Reference Model domain types are selected.
- **All Reference Demo Domains**
If Demo Data and Reference Model domain types are selected.
- **Selected Domains**
If one or more domains are selected from list.

NOTE:

Show data in <domains> is not applicable to the following reports:

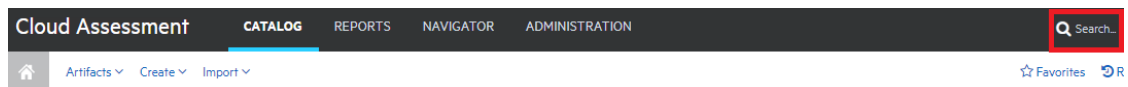
- Policy reports (use Definition UI to set domains)
- Governance Dashboard
- Custom reports (use DQL or SQL definitions to query artifacts)

Searching for Artifacts

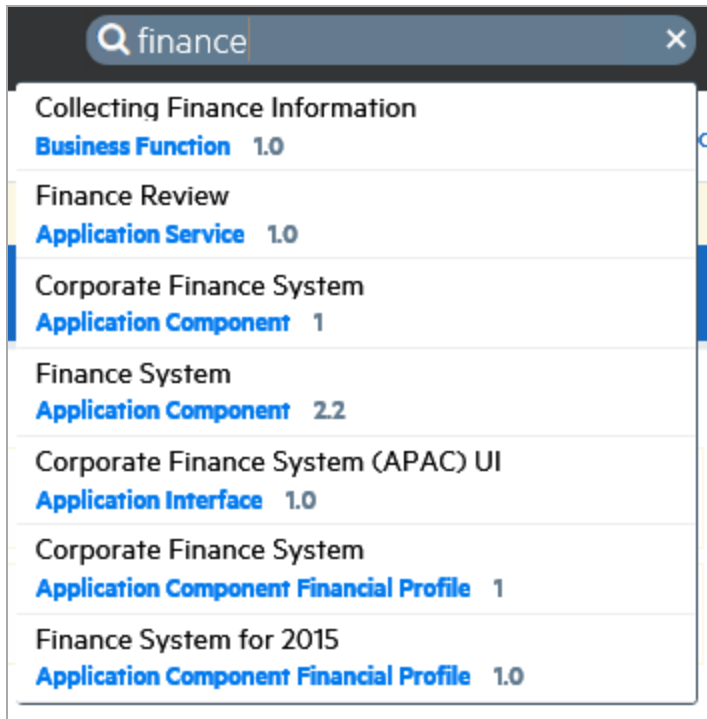
Cloud Assessment enables you to perform artifact search quickly and easily from every page.

To perform a basic search:

1. Enter the text to search for in the Search box.



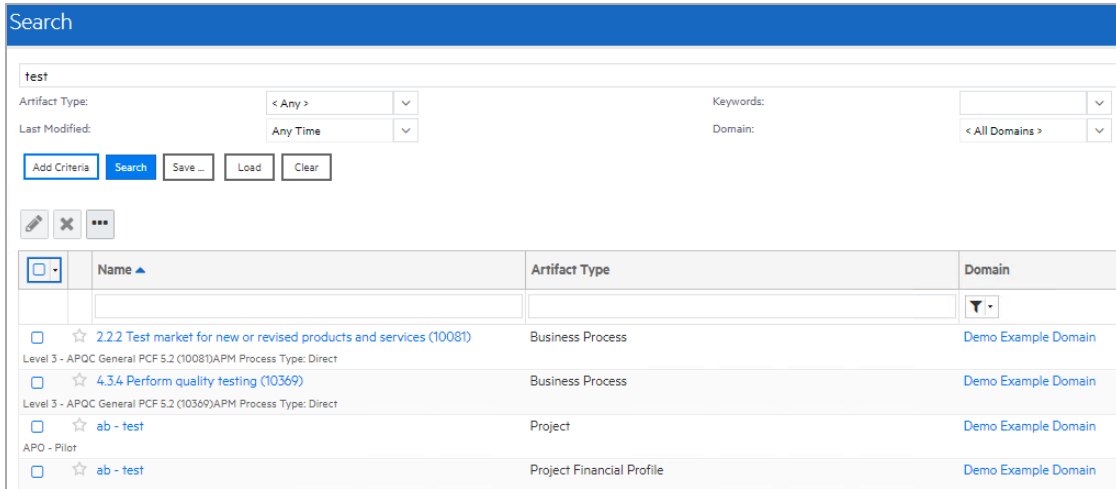
2. For example, if you search for the word "finance," a drop-down list of results is displayed.



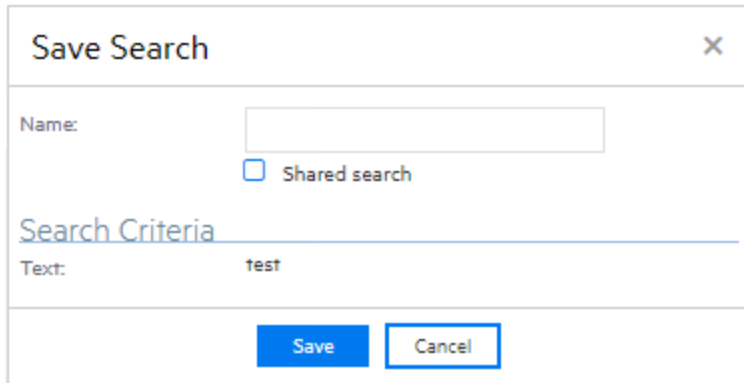
3. Click on the artifact you are interested in to open the Artifact details page.

To perform an advanced search:

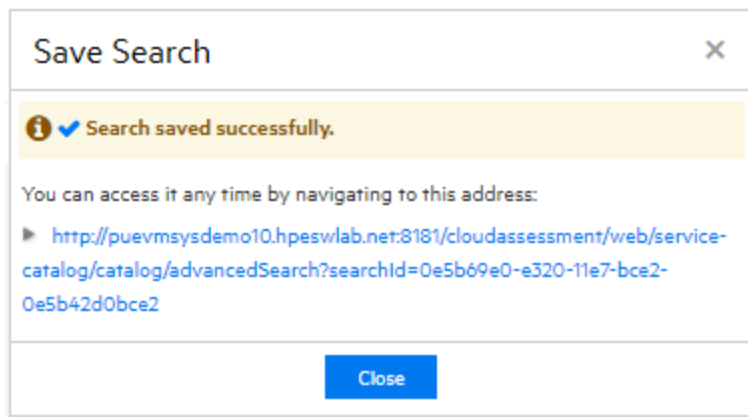
1. Enter the text to search for in the Search box and press enter. The Search page opens showing the text you searched for. In this case, the search word "finance" is shown.



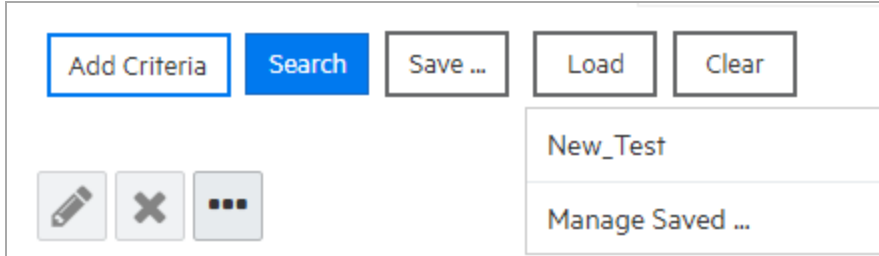
2. To refine your query, use the additional boxes to add additional search terms, key words, or to add criteria.
3. If you want to save the Search for future use, click **Save**. The Save Search box opens.



4. Type the name of your search, and then click **Save**. You can access your search at any time by navigating to the URL address provided. You can also share the search URL with others.



Once you have saved a search, it is displayed each time you click **Load** in the Search page.

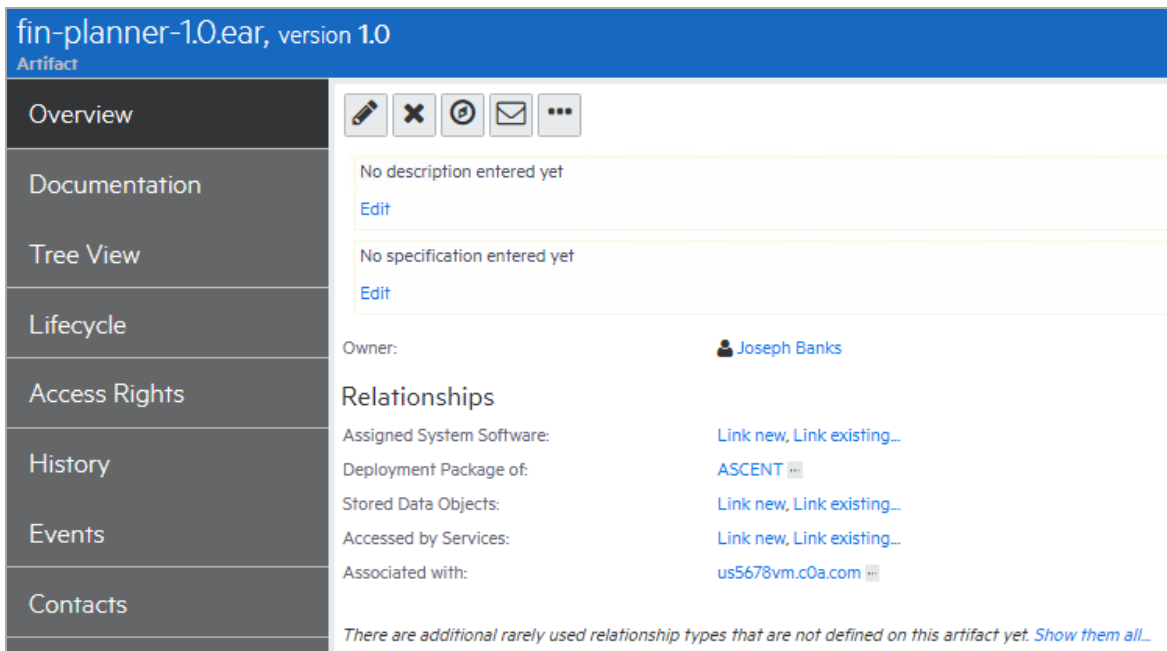


Artifact View Page

An Artifact View page in the Catalog tab presents comprehensive details about each object in the Catalog. Also it provides access to functionality required to perform most of the actions related to individual artifacts.

Each artifact contains a large amount of detail, hence an Artifact View page is organized into a set of tabs enabling you to focus on particular aspects of the artifact.

Access Artifact View page by clicking the name of an artifact wherever it appears in the Catalog tab.



The page header displays the artifact name, artifact type, and artifact ratings. For details about ratings, see [How to Use Ratings, on page 110](#).

The Artifact page contains all available tabs. When you click **More** further tabs are displayed.

NOTE:

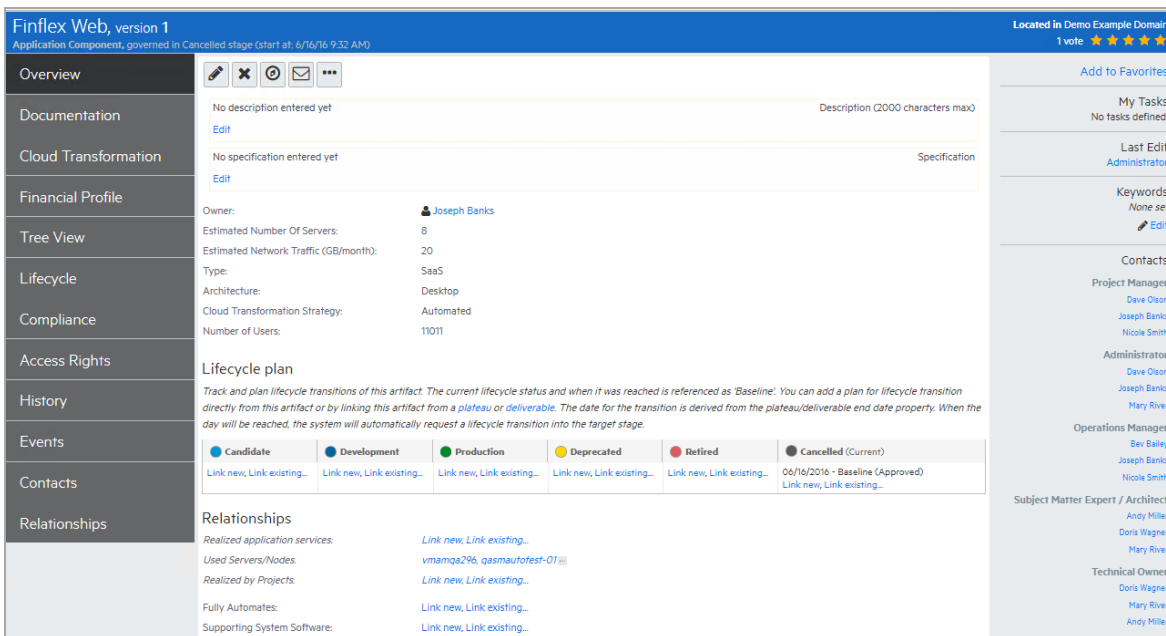
The available tabs and functionality vary according to your role, the artifact type, and your permissions.

Artifact View Page Tabs

Tabs	Tab Content
Overview Tab, below	The most important information about the artifact, such as its major properties, the most important relationships, overviews of events, tasks, last edits, overview of policy compliance and keywords.
Documentation Tab, on page 22	Manage the documents associated with the artifact.
Cloud Transformation Tab, on page 24	Provides the ability to start, manage and review surveys, which helps assess and analyze current application components. Enables publish of service designs, cost estimation deployment and cloud assessment. Assessment can be done from financial, business and technical perspectives.
Financial Profile Tab, on page 27	View and manage the financial properties of a Project or Application Component artifact. This tab is only available on the detail page of the project or application component artifact.
Tree View Tab, on page 28	Shows an artifact structure browser. It either displays composite structure or impact report. In addition to artifact basic information (such as name, owner and type) the browser captures lifecycle information such as the current stage.
Lifecycle Tab, on page 29	Information related to the artifact lifecycle, including as a graphical view of the lifecycle process showing stage details.
Compliance Tab, on page 30	A detailed breakdown of the current policy compliance status of the artifact.
Access Rights Tab, on page 31	View and manage the access rights for the artifact.
History Tab, on page 31	Lists artifact revisions enables users to compare selected two revisions and see the differences between them.
Events Tab, on page 32	Contains all events related to the artifact.
Contacts Tab, on page 33	View and manage the contacts for the artifact.
Relationships Tab, on page 33	View all the incoming and outgoing relationships for the artifact.

Overview Tab

The Overview tab is the default view of an artifact and contains the most important information about the artifact and access to the most common artifact operations.



Overview Tab Content

Content	Description
Description	The description of the artifact with 2000 characters max.
Specification	The first sentence of artifact’s specification. To view more detail, click at More link to open the Specification tab.
Properties	The first section of the page displays the most important properties of the artifact including options to compare versions, and set the provider.
Relationships	The most important relationships display in the Overview tab and in case of a service, the implementations. Click Show them all to show the full relationships section.
Latest Events	Displays the latest actions affecting the artifact. Click More... to open the Events tab or the Tool icon to customize the Events component content. For details, see Events Tab, on page 32 and How to Use Events, on page 107 .
Architecture Changes (Plateau & Deliverable only)	Manages changes for plateau or deliverable. For details, see Setting Target Architecture, on page 65
Context Actions	Displays a set of context actions for the artifact relevant to the artifact type, its current status, and your role. The available actions include the following: <ul style="list-style-type: none"> • Edit - Open the Edit artifact page. • Attach Document - Attach a local or remote document to the artifact. • Navigator - Switch to the graphical navigator view for the artifact. • Delete - Delete the artifact and its sub-artifacts

Overview Tab Content, continued

Content	Description
	<ul style="list-style-type: none"> • Export - Create a ZIP archive for the artifact and its sub-artifacts. • New Version - Create a new version of the artifact and its sub-artifacts. • Atom Feed - Publish a feed for artifact changes or artifact comments. For details, see How to Use Feeds, on page 111. • Send Notification - Send an email notification to artifact stakeholders. For details, see How to Use Notifications, on page 106. • Change Domain - Move the artifact to another domain. • Artifact Comments Feed - Subscribing to the feed allows you to view the latest updated comments on the artifacts. • XML View - Shows the code view of the artifact.
Last Edit	Displays the user and time for the last change to the artifact.
Policy Compliance	Displays the current compliance status with an option to recalculate it.
My Tasks	Displays any actions you may be required to perform related to the artifact. For details, see How to Use Tasks, on page 109 .
Add to Favorites	Click this button to add the artifact to Favorites. Once the artifact is added, the button changes to Favorite button instead. Click this button again to remove it from Favorites.
Keywords	Displays any custom tags applied to the artifact with the option to edit them.
Contacts	Displays the contacts for the artifact with the option to edit them.

Documentation Tab

The Documentation tab provides a place to view and manage the documents associated with the artifact. There are 3 sub-tabs as follows:







Attached Documents

Attached Documents are Documentation artifacts associated with this artifact. For example, a project planning documents of a project.

Analyst Research, version 0.2
 Application Component, governed in Candidate stage (start at: 6/16/16 9:33 AM)

Overview | Documentation | Cloud Transformation | Financial Profile | Tree View | Lifecycle

Specification | Attached Documents | Discussion

<input type="checkbox"/>	Name ▲	Type	Date	Version
<input type="checkbox"/>	createPerson.txt ↗		11:08 AM	1.0
<input type="checkbox"/>	switchtabLC_Overview.txt ↗		11:11 AM	1.0
<input type="checkbox"/>	report_health.txt ↗	Functional Specifi...	11:12 AM	1.0

Attached Documents Sub-tab Content


Content	Description
Documentation Table	Displays list of documents associated with the artifact with functionality to manage them and add more.

Specification

The Specification sub-tab provides a place to view and manage a detailed description of the artifact including rich text and HTML support.

Overview | Documentation | Tree View | Lifecycle | Compliance | Access Rights

Specification | Attached Documents | Discussion



Some of the basic features include:

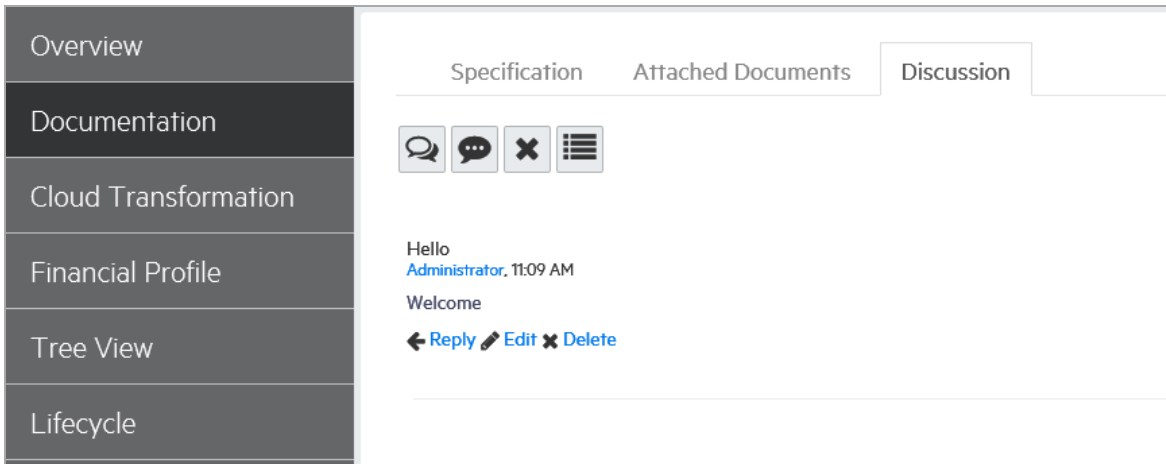
- Software as a service
- Login
- Balance Check
- Cashwithdrawal
- Overdraft Facilities
- Internet Access

Specification Sub-tab Content

Content	Description
Detailed Description	Displays full description for the artifact.
Edit Specification	Changes the Detailed Description area to an input form with rich text and HTML support.

Discussion

This sub-tab provides a forum for users to comment and discuss the artifact.



Discussion Sub-tab Content

Content	Description
Discussion Threads	The main part of the page displays discussion threads and comments about the artifact with options to Reply , Edit , and Delete comments.
Context Actions	Displays a set of discussion context actions for the artifact. The available actions include the following: <ul style="list-style-type: none"> • Show List / Threads - Organize the discussion by comments or by threads. • Sort - In the list view, organize the comments by newest or oldest first. • Add Comment - Start a new discussion about the artifact. • Delete All Comments - Remove all comments and threads about the artifact (administrator only). • Artifact Comments Feed - Obtain a feed URL that you can use in a feed reader or in the Reports Tab. For details, see How to Use Feeds, on page 111.

For details about using the Discussion features, see [How to Use Comments, on page 105](#).

Cloud Transformation Tab

The Cloud Transformation tab provides the ability to start the survey for the application component, review available answers and assessment results. From the UI it allows you to publish the application to HCM (CSA) as a deployable component using predefined templates (service designs or reference models).

This tab is available only for Application Component and its sub-artifacts. Description of different tabs within Cloud Transformation tab are as follows:

Overview sub-tab:

Provides an overview of the cloud transformation state including top-level scores, transformation strategy, deployment models and few other aspects.

Overview Documentation Cloud Transformation Financial Profile Tree View Lifecycle Compliance Access Rights History Show More...

To migrate an application into cloud you need to verify that the application is compatible with such a deployment model. For example the application must support execution on a virtual machine on the other hand the target deployment environment must meet the application security and performance requirements. To get this information fill-in the surveys that will guide you through this process.

Overview Financial Alignment Business Alignment Technical Alignment Deployment Models

Cloud Transformation Score

How this application meets conditions to be hosted in a cloud environment ?
Individual metrics that lead to the decision are available in the Alignment tabs.

Show more information

Financial Alignment: N/A
Business Alignment: 82.67 of 100
Technical Alignment: 25.23 of 100

Cloud Transformation Strategy

The *Cloud Transformation Guide* is used to assess applications, analyze results and determine strategy. *Deployment Models* are required for applications that are selected for cloud transformation and require automated deployment. You might then pre-build a Micro Focus CSA/Codar infrastructure *Service Design* from the deployment model.

Cloud Transformation Strategy: Automated
Deployment Models to Automate: ASAC Production Deployment
Automated Deployment Models: N/A

Financial Alignment sub-tab:

Assesses the viability of transformation from a financial perspective (rough and model-based estimated cost for deployment onto different data centers).

To migrate an application into cloud you need to verify that the application is compatible with such a deployment model. For example the application must support execution on a virtual machine on the other hand the target deployment environment must meet the application security and performance requirements. To get this information fill-in the surveys that will guide you through this process.

Overview Financial Alignment Business Alignment Technical Alignment Deployment Models

Defines alignment of this entity with possible cloud deployment from the financial perspective using a score of 0-100. High score means that resources for the transformation are available and the transformation leads to reasonable savings. These scores are calculated based on a survey *Cloud Financial Assessment*.

Show more information Take New Survey

Financial Alignment Score: N/A

Deployment Costs

Estimate Type: Total estimate for all deployments

Current Data Center: Internal DC
Current Costs: \$20,668
Recommended Data Center: Amazon AWS

Deployment Alternatives

Used Servers/Nodes: vmamqa279, pdo2003intel03.labs.c0a.com

	Internal DC (Current)	Amazon AWS (Lowest Cost)	MS Azure	My VPC
pdo2003intel03.labs.c0a.com	\$9,434	\$1,289	\$1,686	\$2,782
vmamqa279	\$9,434	\$1,289	\$1,686	\$2,782
Networking	\$1,800	\$1,200	\$4,572	\$1,800
Total	\$20,668	\$3,778	\$4,572	\$7,364

You need to provide more information about this application component so that we can estimate costs of the deployment at different infrastructure vendors. Please fill in the details below.

Associated Deployments: Link new, Link existing...

*) This estimate is based on the cost of servers that are part of deployments/ infrastructure services associated with this application. Servers are associated with a deployment via 'Offered Infrastructure Services' shortcut and must have a server class or a server profile assigned. Else, the assigned 'Server Class' of this application is used.

Business Alignment sub-tab:

Assesses the viability of transformation from a business perspective.

Overview | *To migrate an application into cloud you need to verify that the application is compatible with such a deployment model. For example the application must support execution on a virtual machine, the other hand the target deployment environment must meet the application security and performance requirements. To get this information fill-in the surveys that will guide you through this process.*

Overview | Financial Alignment | **Business Alignment** | Technical Alignment | Deployment Models

Business Alignment
Defines alignment of this entity with possible cloud deployment from the business perspective using a score of 0-100. These scores are calculated based on a survey [Cloud Business Assessment](#).

Regulatory Alignment:	87
Vendor Support Alignment:	88
Service Availability Alignment:	96
Security Alignment:	75
Workload Variability Alignment:	73
Geography Alignment:	77

Legend: ■ Current Alignment ■ Minimum Alignment for Public Cloud Hosting

Technical Alignment sub-tab:

Assesses the viability of transformation from a technical perspective.

Overview | Financial Alignment | Business Alignment | **Technical Alignment** | Deployment Models

Technical Alignment
Defines alignment of this entity with possible cloud deployment from the technical perspective using a score of 0-100. These scores are calculated based on a survey [Cloud Technical Assessment](#).

Architecture Alignment:	45.455
Internet Access Alignment:	34.286
Performance Requirements Alignment:	26.667
Micro Focus CSA Alignment:	5
Infrastructure Requirements Alignment:	3.333
Cloud Operating Model Alignment:	36.667

Legend: ■ Current Alignment ■ Minimum Alignment for Public Cloud Hosting

Deployment Models sub-tab

Deployment Models UI is entirely to manage the deployment models associated with this application and to build HCM (CSA) service designs on top of these models.

Overview Financial Alignment Business Alignment Technical Alignment **Deployment Models**

An Application Deployment Model describes an infrastructure service together with various technology-layer elements that provide run of the application. Deployment Models are required for applications that are selected for transformation and require automated deployment. They vary between working environments and SLOs.

Show more information

Reference Applications: [Link existing...](#)

'ASCENT' Deployment Models

Select a deployment below to get more details and possibly to create a service design for it. You may also associate an existing service design with the deployment model then.

Deployment Model: ASCENT Production

ASCENT Production

Environments: Production, Staging

Visualized by Diagrams: N/A

CSA Service Designs: [ASCENT Production - Service Design](#)

Create new Service Design Associate Existing Service Design

The following table displays the mapping of deployment model elements to CSA Topology Components. The CSA Topology Component column is editable. If you wish to change the mapping. The topology components must be imported from CSA first.

Synchronize with CSA

Application Model Element			CSA Topology Component	
Name ↑	Version	Type	Name	Version
ASCENT	1	Application Component	Missing, will be created	
ASCENT DB	1.0	Database Schema	Missing, will be created	
ASCENT Web	1.0	J2EE Application	Missing, will be created	
Apache Tomcat	6.0.18	System Software	Missing, will be created	
Oracle DB	11.2.0.1.0	System Software	Missing, will be created	
Windows 2003	5.2.3790	System Software	Missing, will be created	
Windows 2008 R2	6.1.7600	System Software	Missing, will be created	

Financial Profile Tab

The Financial Profile tab provides a place to view and manage the financial information associated with an Application Component or Project.

Overview **Financial Information** Documentation Cloud Transformation Financial Profile Tree View Lifecycle Compliance Access Rights History Show More...

Here you can see financial plan for the next fiscal period. This information is the source for most financial reports except those that are focused on trends can create financial profile for new fiscal period.

View Details & Edit Take New Survey Review Survey Answers

Annual Cost of Software:	\$ 204,216
Annual Cost of Hardware:	\$ 204,216
Annual Cost Labor Internal:	\$ 204,216
Annual Cost Labor External:	\$ 204,216
Annual Cost Other:	\$ 204,216
Annual Cost Total:	\$ 1,021,080
Entity Health:	●
Net Present Value:	\$ 6,902,500
Return On Investment:	6,946,134
Transformation Cost:	\$ 70,250
Minimum Estimated HW Costs:	\$ 73,706
Current Hardware Cost Estimate:	\$ 102,537

New Fiscal Period

Artifact Financial Profile Tab Content

Content	Description
Financial Information	Shows the financial information associated with the current fiscal period.
New Fiscal Period	<p>Click this button to create a new financial profile and set it as the current fiscal period. Once the new profile is created, the current profile automatically moves to the History table below.</p> <p>The financial profile created by clicking this button is named automatically after the current application component/project name and the current fiscal period.</p> <p>To disable this feature change the <i>enableAutoNamingFinancialProfile</i> to false (for details see, "System Configuration Properties" in the <i>Administration Guide</i>).</p> <p>You can create only one record for each fiscal period</p>
View Details & Edit	Click this button to modify the financial profile of the current fiscal period.
Take New Survey	Click this button to conduct a financial cloud assessment survey for the application component.
Review Survey Answers	Click this button to go over or reassess the survey answers.
History	View a summary of all financial profiles created in the past.

Tree View Tab

The Tree View tab allows you to explore the impact and dependency effects of the current artifact.

The default Dependency view shows the tree of artifacts that the current artifact depends on.

The screenshot shows the 'Dependencies' tab for the artifact 'Analyst Research'. The interface includes a sidebar with navigation options and a main content area with a filter box and a table of dependencies.

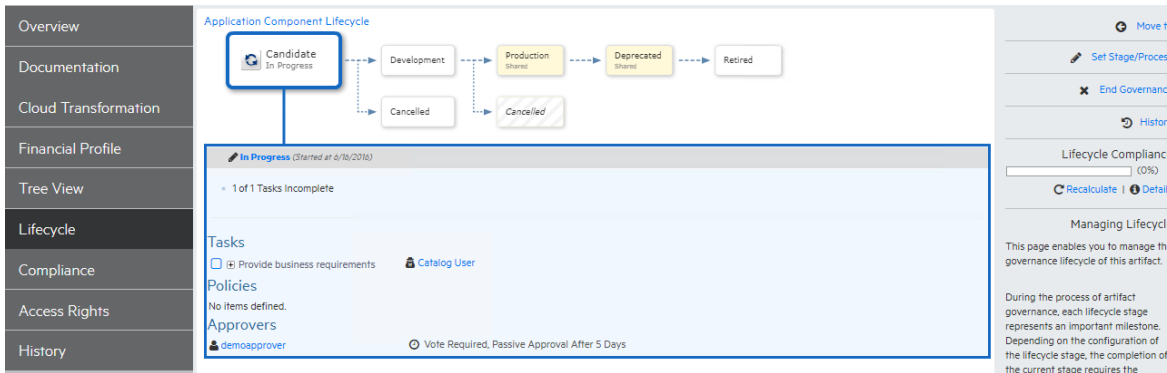
Artifact Name	Category	Value
Analyst Research	Candidate (In Progress)	0.2
Persons (8)		
Andy Miller		
Bev Bailey		
Dave Olson		
Doris Wagner		
Jack Foster		
Joseph Banks		
Mary River		
Nicole Smith		
Business Objects	Candidate (In Progress)	7.4
Persons (8)		
Application Components (3)		
eExpense	Candidate (In Progress)	5.4
Forms Magic	Candidate (In Progress)	5.4
WallChart	Candidate (In Progress)	5.3
ap109vm7.c0a.com		1.0
sv109vm5.c0a.com		1.0
Class 4XL		1.0

Tree View Tab Content

Content	Description
Filter	Use the filter to highlight specific artifacts from the tree.
Artifact Tree	The tree displays impacting artifacts in Dependency view or impacted artifacts in the Impact view, organized by artifact type. Expand groups of artifact types and click artifact names to view their details.
Show Impact	Click to see the impact the current artifact has on the tree of artifacts.
Show Lifecycle Tree	Click to switch over and view the tree of artifacts that follow the current artifact in the lifecycle process.
Navigator	Open the graphical navigator view for the artifact.

Lifecycle Tab

The Lifecycle tab provides a visualization of the life cycle process to which the artifact belongs, and the functionality required to participate in its life cycle.



Artifact Lifecycle Tab Content

Content	Description
Lifecycle Process	The top part of the view displays the lifecycle stages for the lifecycle process the artifact belongs to. The larger stage box is the current stage in progress and the box highlighted in green matches the stage detail information below. Click a stage to view its details and use the arrow controls to view stages that are off the page.
Stage Details	The large green box displays the stage details for the stage selected above. For the current stage, the details start with a summary of the current lifecycle status. For all stages the details box displays the tasks, policies, and stage approvers. As a participant in the lifecycle you can use the stage details box to mark lifecycle tasks as complete, to validate policies associated with the stage, and to approve or reject approval requests.
Context Actions	Displays a set of context actions for the artifact relevant to its current lifecycle status and your role. The available actions include the following:

Artifact Lifecycle Tab Content, continued

Content	Description
	<ul style="list-style-type: none"> • Start Governance - Put a non-governed artifact into an appropriate lifecycle process. • End Governance - Remove the artifact from a lifecycle process. • Set Stage/Process - Change the current stage and lifecycle process for the artifact (administrator only). • Request Approval - Request approval for the current lifecycle stage for the artifact. • Cancel Approval - Cancel an approval request. • Notify Approvers - Send a notification email to the stage approvers. • History - View the lifecycle history for the artifact.
Compliance	Displays the current compliance status with an option to recalculate it.

Compliance Tab

The Compliance tab provides a detailed view of the policies that apply the current lifecycle stage that the artifact belongs to with an option to view the XML representation of the resources that the policies validate.

The screenshot shows the Compliance tab interface. On the left is a sidebar with navigation options: Overview, Documentation, Cloud Transformation, Financial Profile, Tree View, Lifecycle, Compliance (highlighted), and Access Rights. The main content area is titled 'Lifecycle Compliance' and includes a description: 'This artifact is involved in an active lifecycle process. Here you can review the status of all policy assertions needed to be evaluated so that you can advance into new lifecycle stage.' Below this, it shows 'Current Status: 0%' and a 'Show:' dropdown with 'Policies' selected. A table displays policy details:

Policy	Type	Status	Errors	Warnings	Validated Tasks
Has Business Requirements	Required	Non-Compliant	1	0	Provide business requirements

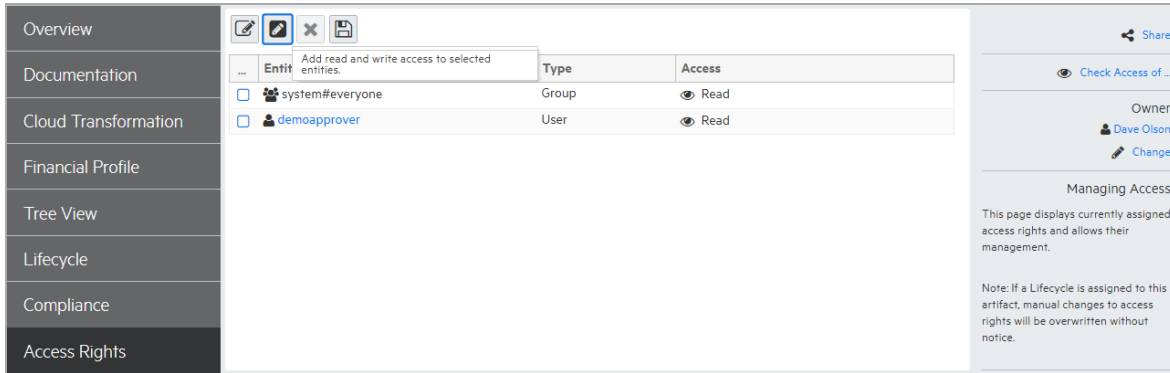
Below the table, it says 'Policy Compliance' and provides instructions: 'Check the aggregated policy violations from all known policy reports. You can review the current policy reports and also define a new one. You can do that on the "Reports" tab by selecting Create under All Reports.' At the bottom, it states 'No issues have been found so far.'

Compliance Tab Content

Content	Description
Show	Switch between the Policies view and the Annotated Sources view.
Policies	The table of currently applicable policies, their type, and current status.
Annotated Sources	Provides a detailed XML view of the relevant resources that the policies validate. This view is most useful to assertion and WSDL developers resolving validation errors.

Access Rights Tab

The Access Rights tab provides a detailed view of the users, groups, and roles with permissions for the artifact and access management actions for users with appropriate permissions.







Access Rights Tab Content

Content	Description
Access Rights Table	Displays the users, groups, and roles with permissions for the artifact and their rights. Users with appropriate permissions can manage the access rights using the table actions.
Context Actions	Displays a set of discussion context actions for the artifact depending on your role and artifact permissions. The available actions include the following: <ul style="list-style-type: none"> • Share - Make the artifact visible to all users by giving them all read permission. For details, see How to Share Artifacts, on page 113. • Check Access Of - Verify the access rights for a particular user.
Owner	Displays the current user, group, or role ownership for the artifact with the option to change it for users with appropriate permissions.

History Tab

The History tab provides a detailed view of the revisions of the artifact with functionality to compare revisions.









Overview						
Documentation	...	Revision ▾	Date	Actor	Lifecycle Stage	Lifecycle Process
Cloud Transformation	<input type="checkbox"/>	4	8:29 AM	 Administrator	Candidate	Application Component Lifecycle
Financial Profile	<input type="checkbox"/>	3	8:28 AM	 Administrator	Candidate	Application Component Lifecycle
Tree View	<input type="checkbox"/>	2	7:48 AM	System	Candidate	Application Component Lifecycle
Lifecycle	<input type="checkbox"/>	1	6/16/2016	 Administrator	Candidate	Application Component Lifecycle
Compliance						
Access Rights						
History						
Show More...						

History Tab Content

Content	Description
Revisions Table	Displays a list of the revisions with details about the time of the change, who performed it, and lifecycle details. Click a revision number to view its details including options to revert to that revision or use the Compare Revisions action to examine the changes in detail.

Events Tab

The Events tab provides a detailed view of the actions performed on the artifact.

Overview				
Documentation	Actor: <input checked="" type="checkbox"/> Me <input checked="" type="checkbox"/> Others (Select All Clear)			
Cloud Transformation	Event	Actor	Date ▾	Type
Financial Profile	 New comment reply on thread 'Add people' has been added on Applica...	New  admin	9:18 AM	Comments
Tree View	 New comment thread 'Add people' has been created on Application Co...	New  admin	9:17 AM	Comments
Lifecycle	 New comment reply on thread 'What is data about?' has been added o...	New  admin	9:17 AM	Comments
Compliance	 New comment thread 'What is data about?' has been created on Applic...	New  admin	8:30 AM	Comments
Access Rights				
History				
Events				

Events Tab Content

Content	Description
Events Table	Displays a list of the actions performed on the artifact with details about the time of the change, who performed it, and the type of action. Click an event to view the relevant artifact details or use the Actor filter to reduce the set of events to those you performed or those performed by other users.

Contacts Tab

The Contacts tab provides a detailed view and management options for contacts for the artifact organized by their contact type.

Business Owner				
<input type="checkbox"/>	★ Andy Miller	euser@company.com		
<input type="checkbox"/>	★ Doris Wagner	dwagner@company.com		
<input type="checkbox"/>	★ Nicole Smith	nsmith@company.com		

Technical Owner				
<input type="checkbox"/>	★ Dave Olson	dolson@company.com		
<input type="checkbox"/>	★ Doris Wagner	dwagner@company.com		
<input type="checkbox"/>	★ Mary River	mary_qc@company.com		

Administrator				
<input type="checkbox"/>	★ Bev Bailey	bbailey@company.com		

Contacts Tab Content

Content	Description
Contacts	The set of contacts for the artifact organized by contact role. Users with appropriate permissions can manage the contacts.
Send Message	Send a notification email to selected users. For details, see How to Use Notifications, on page 106 .

Relationships Tab

The Relationships tab provides a detailed view of the related artifacts organized by outgoing and incoming relationships.

Outgoing				
<input type="checkbox"/>	Relationship ▲	Artifact	Type	Version
<input type="checkbox"/>	Assigned From	Internal DC	Data Center	1.0
<input type="checkbox"/>	Provided by	Doris Wagner	Person	
<input type="checkbox"/>	Provided by	Doris Wagner	Person	
<input type="checkbox"/>	Provided by	Doris Wagner	Person	
<input type="checkbox"/>	Provided by	Joseph Banks	Person	
<input type="checkbox"/>	Provided by	Joseph Banks	Person	
<input type="checkbox"/>	Provided by	Joseph Banks	Person	
<input type="checkbox"/>	Provided by	Joseph Banks	Person	
<input type="checkbox"/>	Provided by	Andy Miller	Person	
<input type="checkbox"/>	Provided by	Andy Miller	Person	

Incoming				
<input type="checkbox"/>	Relationship ▲	Artifact	Type	Version
<input type="checkbox"/>	Composes	GetCCM	Application Interface	1.0

Relationships Tab Content

Content	Description
Relationship Tables	Displays the set of outgoing and incoming relationships with details of the related artifact, its type and version, and the relationship type.

Relationship Editor

The Cloud Assessment relationship editor enables you to view and modify artifact relationships directly. Relationships can be those predefined within the ArchiMate model or you can add new relationships. Both ArchiMate and non-ArchiMate relationships are shown on the Overview tab view. You can add new or manage relationships by using the Relationship tab view.

This section covers the following topics:

- [Understanding Relationship Types, below](#)
- [Using Relationships Editor, on page 36](#)
- [Adding an Artifact Relationship, on page 37](#)
- [Removing an Artifact Relationship, on page 40](#)
- [Adding and Removing a Shortcut, on page 41](#)
- [Non-Compliant Relationships, on page 42](#)

Understanding Relationship Types

Relationships are created according to the Cloud Assessment SDM which is based on Archimate® specification. Cloud Assessment supports the following relationship types:

- *Direct relationship*: relationships between the artifacts that are defined as relationship properties in SDM.
- *Shortcut relationship*: relationships that are derived from a chain of direct relationships. For more details, see "Shortcut Relationship" in *Concepts Guide*.

Direct relationships are further divided into 2 sub types:

- *Compliant relationship*: relationships defined in Archimate® specification.
- *Non-compliant relationship*: relationships not defined in Archimate® specification. These relationships are either Cloud Assessment system relationships (for example: documentation) or user-defined relationships.

Compliant relationships are shown in normal color while non-compliant ones are highlighted in red.

Relationships

Realized application services:	Link new , Link existing...
Used Servers/Nodes:	vmamqa279 , pdo2003intel03.labs.c0a.com ⋮
Realized by Projects:	Link new , Link existing...
Fully Automates:	Link new , Link existing...
Supporting System Software:	Link new , Link existing...
Default Server Class:	Class HML ⋮
Supported Operating Systems:	Microsoft Windows ⋮
Used Application Architecture:	GetCCM, CRM UI ⋮
Used Infrastructure:	ASAC Production Deployment ⋮
Application Function:	Link new , Link existing...
Used by Business Architecture:	Link new , Link existing...
Deployment Specification:	Auto-Generate J2EE Application with Tomcat7 ⋮
Provided by:	Mary River Andy Miller Jack Foster Doris Wagner and 20 more ⋮
Financial Profile:	ASAC for 2015 ⋮
Assigned From:	Internal DC ⋮
Recommended Data Centers:	Amazon AWS ⋮

There are additional rarely used relationship types that are not defined on this artifact yet. [Show them all.](#)

Non-compliant Relationships

There are relationships that are not compliant with the current data model. By using those you risk that certain reports won't work correctly. To handle this, you can:

- 1. Re-enter those into the system properly while following the current model.*
- 2. Declare this kind of relationship as a [shortcut](#) if you want to keep them in the repository as is.*

[Hide them for now...](#)

Composes:	GetASAC ⋮
-----------	--

Each relationship that you create for an artifact has another paired artifact. Each member of the paired relation is assigned a unique name, representing the outgoing and incoming relation between the artifacts.

To explain better, an outgoing relation between artifacts A and B automatically implies the corresponding incoming relation between B and A. Outgoing relations are properties of source artifact (A), whereas incoming relations are projections of the outgoing relationships with target artifact (B).

You might want to assess the outgoing and incoming relationships listed for a selected artifact, so as to browse through the data and learn the relationship structure of the artifact.

To view the outgoing and incoming relationships of a selected artifact:

1. Select the artifact in the Catalog Browser or in the Navigator, and then open the artifact.
2. Click the **Relationships** tab. The artifact's relationships are shown, grouped by direction.

The screenshot shows the 'ASAC, version 1' Relationships Editor. The interface is divided into a left sidebar with navigation tabs (Overview, Documentation, Cloud Transformation, Financial Profile, Tree View, Lifecycle, Compliance, Access Rights, History, Relationships, Show More...) and a main content area. The 'Relationships' tab is active, displaying two sections: 'Outgoing' and 'Incoming'.

Outgoing Relationships:

Relationship	Artifact	Type	Version
Assigned From	Internal DC	Data Center	1.0
Provided by	Doris Wagner	Person	
Provided by	Doris Wagner	Person	
Provided by	Doris Wagner	Person	
Provided by	Joseph Banks	Person	
Provided by	Joseph Banks	Person	
Provided by	Joseph Banks	Person	
Provided by	Andy Miller	Person	
Provided by	Andy Miller	Person	
Provided by	Dave Olson	Person	

Incoming Relationships:

Relationship	Artifact	Type	Version
Composes	GetASAC	Application Interface	1.0
Financial Profile	ASAC for 2015	Application Component Financial Profile	1
Realized By	Auto-Generate J2EE Application with Tomcat7	Deployment Specification	1.0.0
Survey	Cloud Business Assessment - marketing applications	Survey	1.0

Using Relationships Editor

The Overview tab shows all related artifacts of the current artifact under Relationships section. By default, only commonly used relationships are shown. However, you can click *Show them all...* to show all relationships that are Archimate® compliant for the current artifact.

Relationships

Realized application services:	Link new , Link existing...
Used Servers/Nodes:	vmamqa279 , pdo2003intel03.labs.c0a.com ...
Realized by Projects:	Link new , Link existing...
Fully Automates:	Link new , Link existing...
Supporting System Software:	Link new , Link existing...
Default Server Class:	Class HML ...
Supported Operating Systems:	Microsoft Windows ...
Used Application Architecture:	GetCCM, CRM UI ...
Used Infrastructure:	ASAC Production Deployment ...
Application Function:	Link new , Link existing...
Used by Business Architecture:	Link new , Link existing...
Deployment Specification:	Auto-Generate J2EE Application with Tomcat7 ...
Provided by:	Mary River Andy Miller Jack Foster Doris Wagner and 20 more ...
Financial Profile:	ASAC for 2015 ...
Assigned From:	Internal DC ...
Recommended Data Centers:	Amazon AWS ...

There are additional rarely used relationship types that are not defined on this artifact yet. [Show them all.](#)

Non-compliant Relationships

There are relationships that are not compliant with the current data model. By using those you risk that certain reports won't work correctly.

1. Re-enter those into the system properly while following the current model.
2. Declare this kind of relationship as a *shortcut* if you want to keep them in the repository as is.

If you have many related artifacts of a single relationship type, then by default only 4 most recently modified artifacts are visible. To view all related artifacts click the **More...** button that opens related artifacts in table view.

The quantity of related artifacts shown by default (4) can be customized by editing the value of system property `platform.ui.relationship.artifact.max`. For details, see "How to Manage System Properties" in *Administration Guide*.

Adding an Artifact Relationship

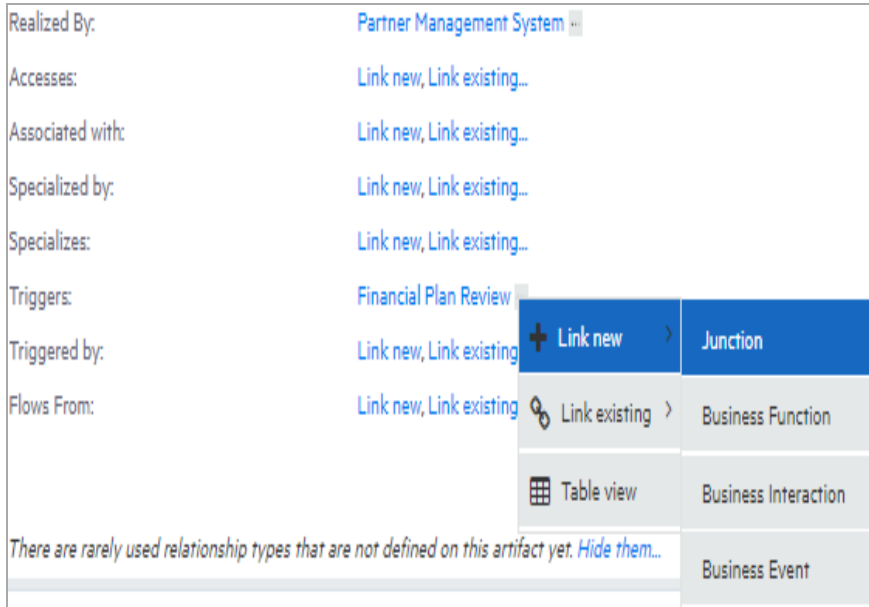
To add relationships to existing artifacts or create new artifacts to relate to:

1. Select the artifact in the Catalog Browser or in the Navigator, and then open the artifact.
2. There are Link new and Link existing buttons available next to the relationship type that you can use to create a new artifact or link to existing artifacts.

Relationships	
Realized application services:	Link new , Link existing...
Used Servers/Nodes:	vmamqa279 , pdo2003intel03.labs.c0a.com ...
Realized by Projects:	Link new , Link existing...
Fully Automates:	Link new , Link existing...
Supporting System Software:	Link new , Link existing...
Default Server Class:	Class HML ...
Supported Operating Systems:	Microsoft Windows ...
Used Application Architecture:	GetCCM , CRM UI ...
Used Infrastructure:	ASAC Production Deployment ...
Application Function:	Link new , Link existing...
Used by Business Architecture:	Link new , Link existing...
Deployment Specification:	Auto-Generate J2EE Application with Tomcat7 ...
Sub-components:	Link new , Link existing...
Provides/Requires:	Link new , Link existing...
Owning component:	Link new , Link existing...
Included in Plateaus:	Link new , Link existing...
Supporting System Software:	Link new , Link existing...
Requirements:	Link new , Link existing...
Visualized by Diagrams:	Link new , Link existing...
Influenced Values:	Link new , Link existing...
Provided by:	Mary River Andy Miller Jack Foster Doris Wagner and 20 more ...
Aggregated by:	Link new , Link existing...

- When you click the Link new button, the available artifact types will appear in a menu. Only an applicable artifact type is visible when you click the Link new or Link existing buttons. After establishing a relationship to one or more artifact(s), the menu is replaced with a list of the existing relationships.

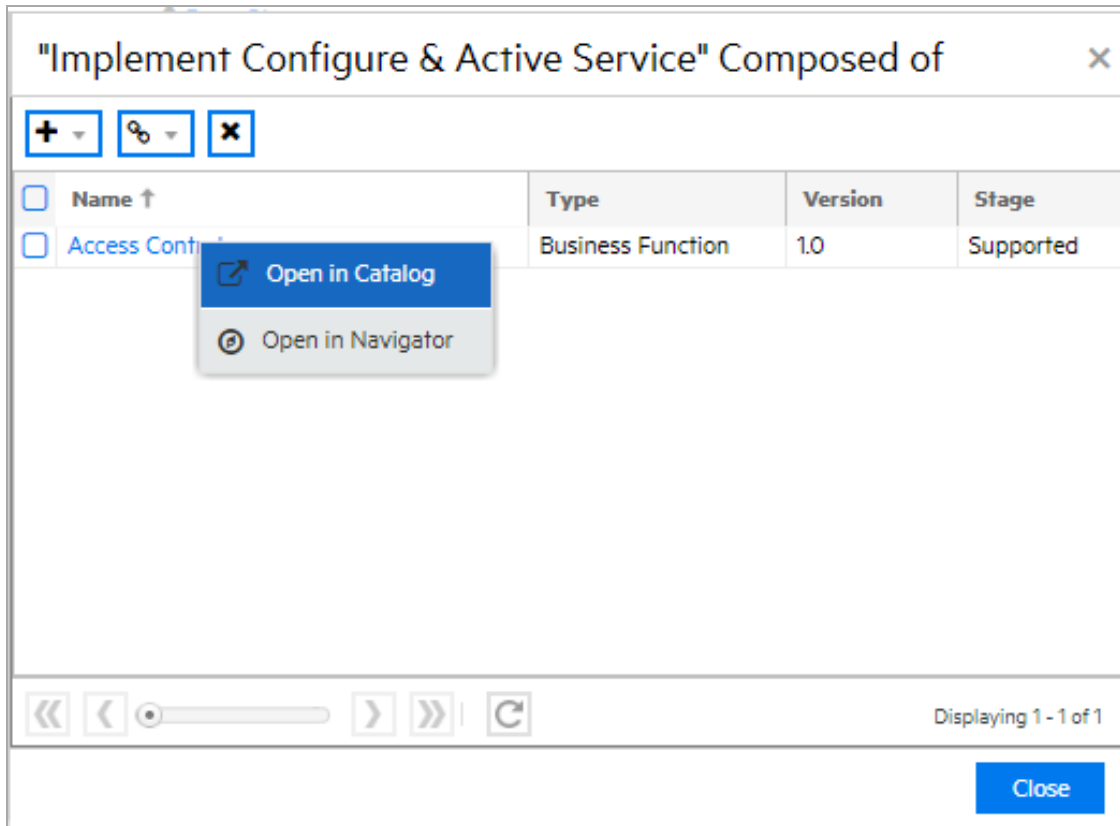
For example, when you click Link new in the Triggers relationship type, the menu displays the available artifact types.



4. For artifact types that already contain data, the Link new and Link existing buttons will be hidden from view. You can add more artifacts to this relationship type by clicking on the relationship type name. You will see a separate menu for managing the relationship, which includes the option to view the relationships in a table view:



5. If you choose to view in Table View, each row has a context menu to open an artifact in the Catalog or Navigator:

**NOTE:**

When you link more than 10 existing artifacts to a relationship, the operation is asynchronous, i.e., the relationship is not updated immediately after the page load, instead the progress is displayed. Once the asynchronous operation is complete, a summary information is displayed.

Otherwise, the operation is synchronous, i.e., the relationship is updated immediately. Both synchronous and asynchronous operations are applicable for deleting artifacts from a relationship.

Removing an Artifact Relationship

To remove existing artifact relationships:

1. Select the artifact in the Catalog Browser or in the Navigator, and then open the artifact.
2. From the Overview tab, you are able to remove the link between the selected artifact and another artifact. For removing a specific artifact link from a current artifact, right-click on the artifact you want to remove, then remove it by selecting the 'Unlink from this artifact' option.

Relationships

Realized application services: [Link new](#), [Link existing...](#)

Used Servers/Nodes: [vmamqa279](#), [pdo2003intel03.f](#)

Realized by Projects: [Link new](#), [Link existing...](#)

Fully Automates: [Link new](#), [Link existing...](#)

Supporting System Software: [Link new](#), [Link existing...](#)

Default Server Class: [Class HML](#) ...

Supported Operating Systems: [Open in Catalog](#)

Used Application Architecture: [Open in Navigator](#)

Used Infrastructure: [Unlink from this artifact](#)

Application Function:

- You can also remove a set of artifacts linked to a the selected artifact while in the Table view, simply by selecting each artifact you wish to remove from the list.

"FinPlanner" Realizes ✕

<input checked="" type="checkbox"/> Name ↑	Type	Version	Stage	Shortcut Paths
<input checked="" type="checkbox"/> FinPlanner Applic...	Application Compon...	1.0	Candidate	
<input checked="" type="checkbox"/> FinPlanner Presen...	Application Compon...	1.0	Candidate	

Displaying 1 - 2 of 2

[Close](#)

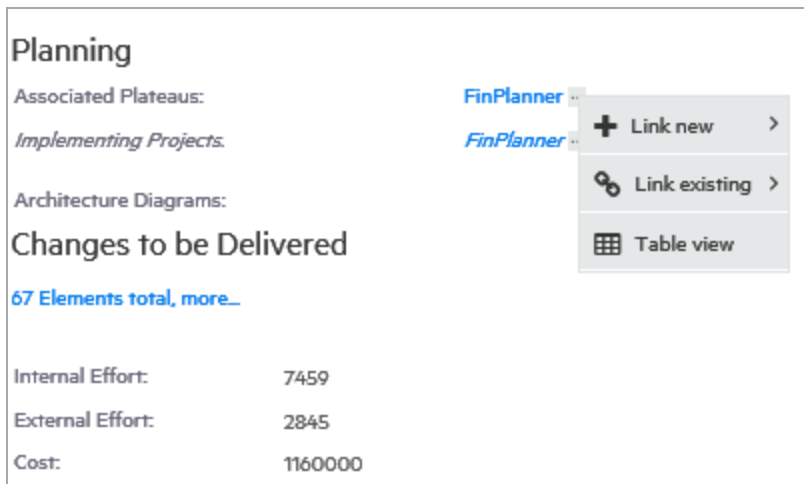
Adding and Removing a Shortcut


Shortcut can be created without using the Relationship Editor or Relationships tab of an artifact. Here is how:

NOTE:

Make sure that the `canBeEntered` attribute is set to `true` in the shortcut definition.

1. Open the Overview page of the source or target artifact in a shortcut.




2. There must be at least one shortcut created for this artifact. Click the  icon next to the shortcut.
3. Select the **Link new** to create a shortcut to a new artifact.
4. Select **Link existing** to create a shortcut to an existing artifact.

NOTE:

When opening the source artifact of a shortcut, Link new/Link existing creates a shortcut to the target artifact and vice versa.

Similar to removing an artifact relationship; to remove a shortcut:

- Right-click the target artifact and select *Unlink from this artifact*
- Alternatively, from relationship table view of shortcut relationship, select target artifact(s) and click .

NOTE:

- Calculated shortcuts based on relationships with other artifacts cannot be removed.
- Shortcuts created by Shortcuts Consolidation Task cannot be removed. These shortcuts have at least one path which is resolved from shortcut definitions (declared in Cloud Assessment based on Archimate® specification).

Non-Compliant Relationships

Cloud Assessment enables you to create non-compliant relationships (relationships between artifacts that are not as per Archimate® standards). For example: to have a Business Actor “use” an Application Component.

Non-compliant relationships can be created using Relationships tab only, and is displayed in red color, in Relationship Editor as follows:

Non-compliant Relationships

There are relationships that are not compliant with the current data model. By using those you risk that certain handle this, you can:

- 1. Re-enter those into the system properly while following the current model.*
- 2. Declare this kind of relationship as a [shortcut](#) if you want to keep them in the repository as is.*

[Hide them for now...](#)

Composes:

GetASAC ...

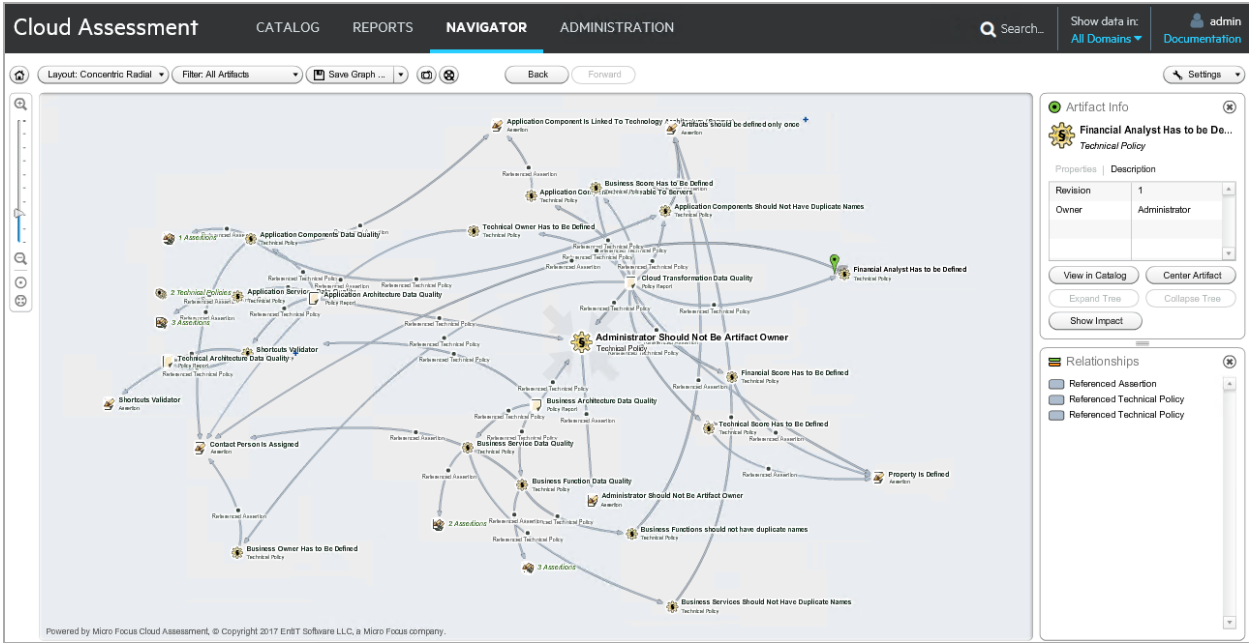
NOTE:

Micro Focus recommends using compliant relationships over non-compliant ones as they can be synchronized with Sparx EA without requiring modification.

Chapter 3: Navigator

The Navigator tab graphically represents the content of a catalog. The objective is to bring about and showcase the structure and dependencies of the Archimate® concepts in the Catalog, rather than simply focusing on a single artifact.

Navigator primarily provides for an alternative view, equipped with the capability to explore, browse, and traverse across the Catalog content along a pictorial view.



The main features of the Graphical Navigator are:

- **Catalog Browsing**
Allows you to browse the content of the Catalog in an easy and quick manner.
- **Layouts**
Enables you to view artifact graphs by selecting different layouts. You can organize the artifacts into various structures to view a particular aspect of their relationship. There is also the option to create customized layouts if you wish to focus on specific relationship structures.
- **Filters**
Provides a set of filters focusing on artifacts of interest to each architectural layer, as well as the option to create custom filters.
- **Save Graphs**
Allows you to save a particular graph with the selected layout, which means you can return to the saved graph at a later time. The graph is interactive and lets you move or expand it, or collapse nodes to change the appearance.
- **Impact Highlights**
Enables you to view the impact of change to an artifact (impact analysis).
- **Screenshots**
Enables you to create an image file copy of the graph layouts.

Chapter 4: Reports

Cloud Assessment provides many reports that you can run based on the artifacts in your enterprise architecture data model. On the Reports tab, you can access many artifact, policy, heatmap, structure map, and custom reports. You can also view Architecture reports such as Archimate Compliance and Installed Software as well as Transformation reports such as Roadmaps, Investments, Project by Cost, and Applications by Cost. Maintenance reports such as Application Costs are also available, and you can also customize the reports that appear on your dashboard.

The report type that you choose depends on the results, data format, and granularity that you require. The following are the report types to choose from:

- [Report Dashboard, below](#)
- [Artifact Reports, on page 48](#)
- [Policy Reports, on page 50](#)
- [Heat Map Reports, on page 53](#)
- [Structure Map Reports, on page 54](#)
- [Custom BIRT Reports, on page 55](#)
- [Project Roadmap Reports, on page 55](#)
- [Lifecycle Plan Roadmap Report, on page 56](#)
- [Cloud Transformation Reports, on page 56](#)

Reports are customizable. Administrators can therefore create and deploy new reports without having to restart Cloud Assessment. For more details, see "Report Creation" in *Customization Guide* or contact Micro Focus sales representative for assistance.

Report Dashboard

Report dashboard is a collection of reports created for a purpose. For example: Governance Dashboard gives you an overview of the compliance level percentage as a result of the Cloud Assessment policy reports.

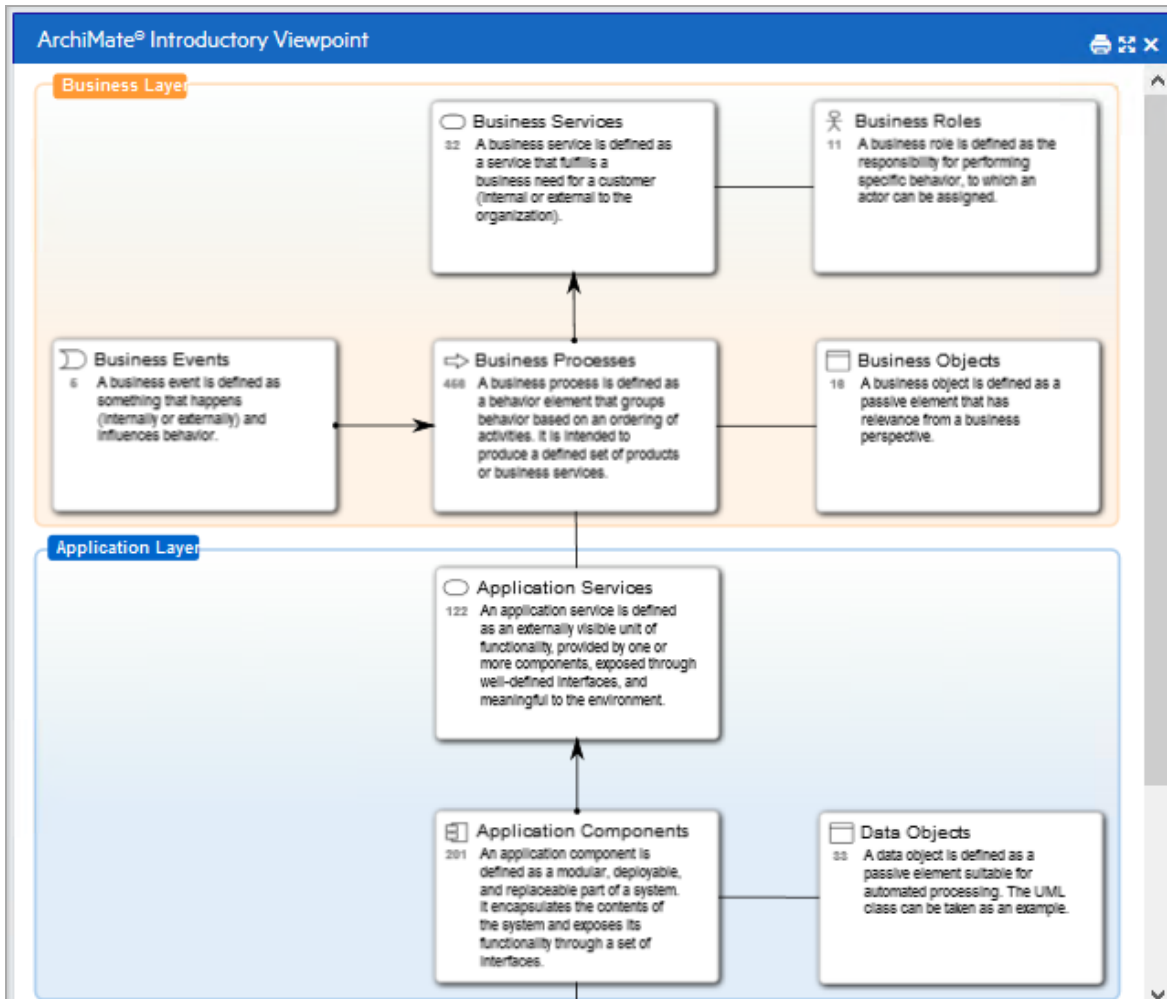
Report dashboard can be customized by the users as per their requirement, or can be reset back to the default installation. Users can also create new report dashboards for their own use.

- [Archimate Introductory Viewpoint , below](#)
- [Policy Radar Report, on the next page](#)
- [Adding a Portlet to Your Dashboard , on page 47](#)
- [Printing Portlet Content, on page 47](#)

Archimate Introductory Viewpoint

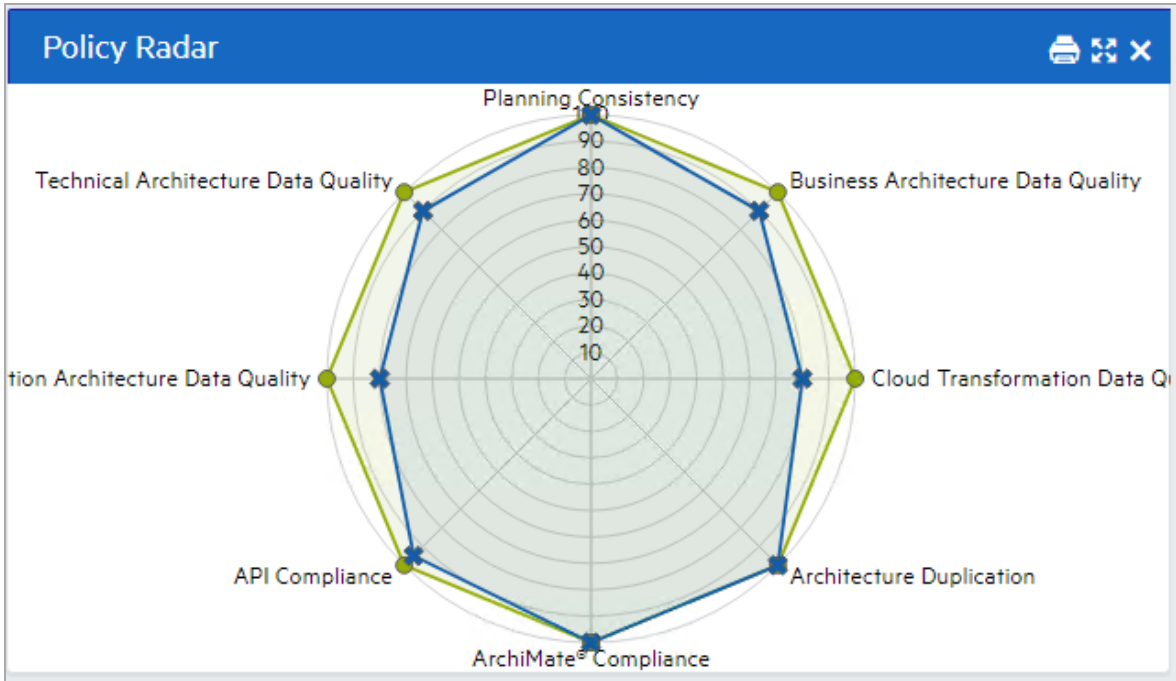
The Cloud Assessment data model is based on Archimate® modeling language specification and similar to that it consists of artifacts grouped on the basis of type of artifacts belonging to different layers, and also artifact properties and relationships.

The Archimate® Introductory Viewpoint displays common artifact types and their relationships in 3 basic layers. This viewpoint supports the impact analysis of its artifacts.



Policy Radar Report

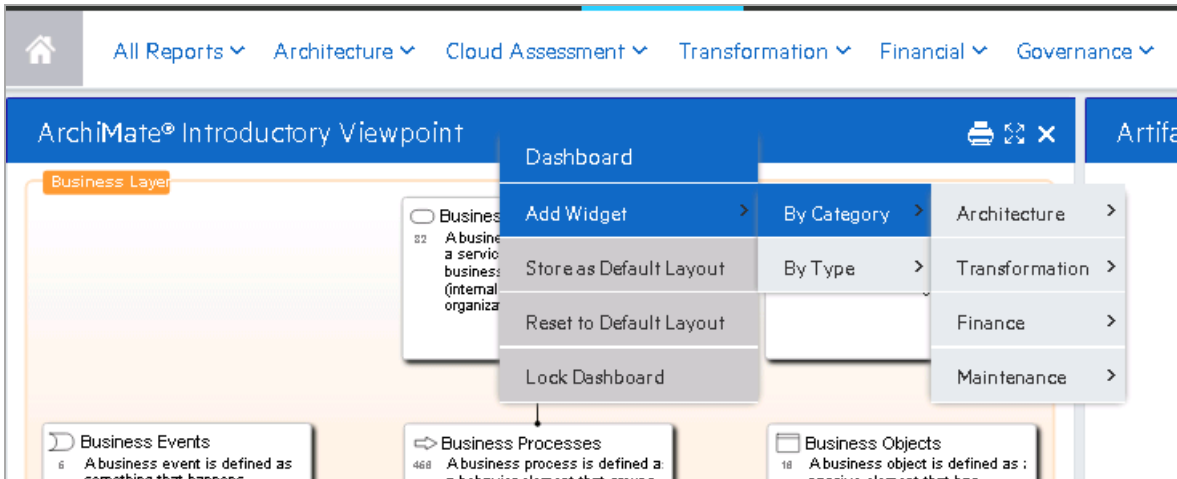
Cloud Assessment policy radar reporting is a web UI portlet that displays a radar chart showing the difference between the policy report’s actual and target compliance. By default, the policy radar displays all policy reports available Cloud Assessment. The layout and contents of the radar can be customized using a managed server-side script.



Adding a Portlet to Your Dashboard

To add a Portlet to your dashboard:

1. In the Reports page right-click to open the Dashboard menu as shown in the image below.
2. Select the portlet to add to your dashboard.



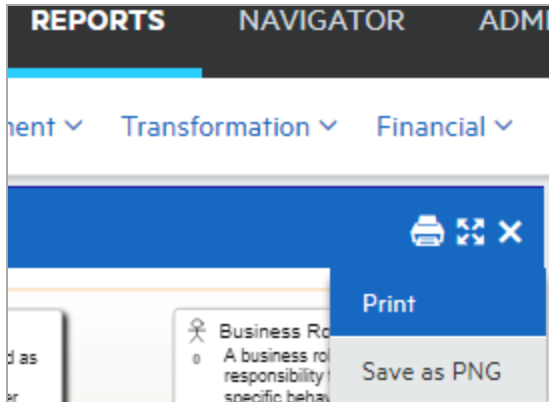
Printing Portlet Content

Cloud Assessment provides the option to print dashboard portlet contents from the Reports tab. This is useful as you can convert the report to PDF for instance.

As of now, this option is available for Viewpoint Model, Artifact Statistic and Policy Radar on the Reports home page. Other reports that can be printed are Structure map Reports, Heatmap Reports, Data Matrix Reports and Rating Reports under drop-down for different sub-menu options.

To print, the instructions are as follows:

1. Select the report you wish to print.
2. Click the print icon to preview and print the report.



3. For each browser the print instruction may differ, follow the steps and then click **OK**.
4. Select **Shrink To Fit** on Print dialog or Printing Preferences to print the entire portlet content on a single page.

NOTE:
For print preview in IE, click **Internet Options > Security > Custom level**. Scroll down for the option **Initialize and script ActiveX controls not marked as safe for scripting** and select **Prompt**. Restart your machine and click the print icon to see the print preview.
For Chrome the print preview shows automatically upon clicking the print icon. Firefox does not support print preview.

5. For good print results, set the following in your browser Page Setup or Preview page:
 - a. Mode: Landscape
 - b. Paper size: A3 or larger
 - c. Background graphics / Print Background (colors & images): must be selected

Artifact Reports

Cloud Assessment artifact reports provide table views of the artifact data contained in the Cloud Assessment repository. The report is designed and used directly in the Cloud Assessment web UI. The artifact table represents the result of a DQL query that is part of the report definition. Artifact reports are re-calculated every time the user accesses the report's web UI page.

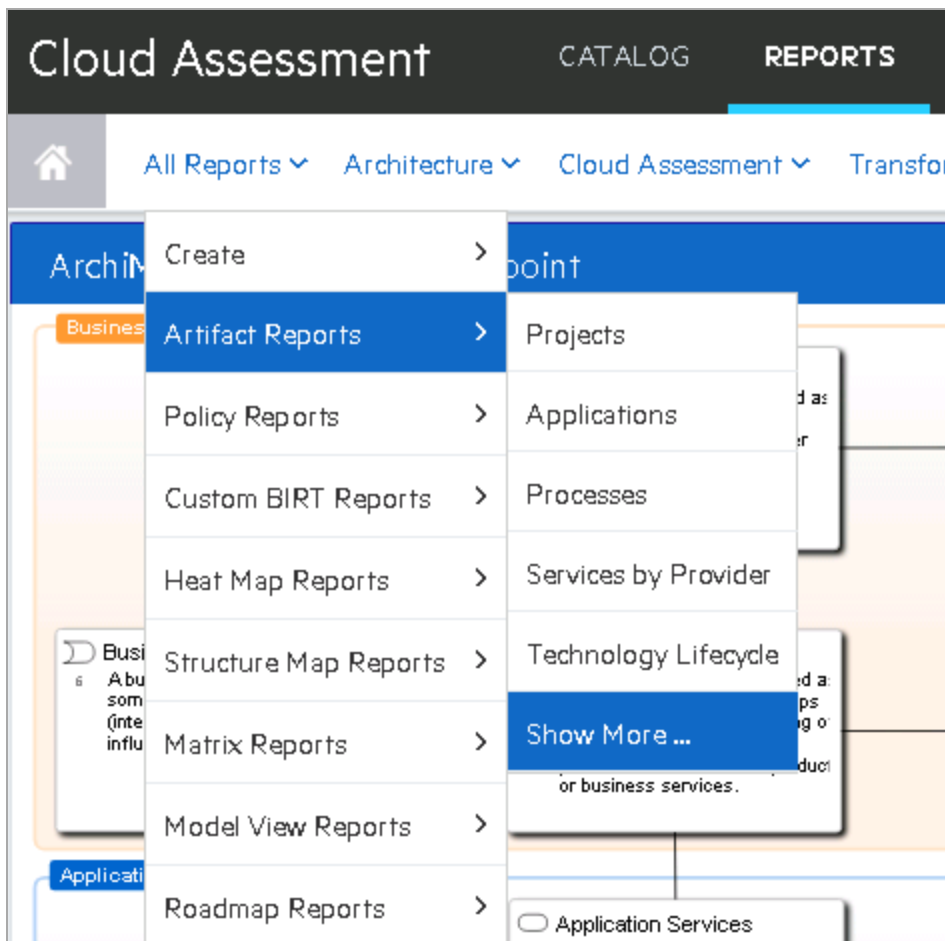
Health	Name	Manager	Planned Start	Planned Fini...	Lifecycle Sta...	Comple...	NPV	ROI	Discount R...	Budget	Planned Co...	Actual Cost
●	A/R Billing Upgrade	Joseph Banks	March 2015	July 2016	Kick-off	0 %	\$ 3,282,000	3,282,000	10 %	\$ 0	\$ 1,121,000	\$ 1,215,000
●	ACME Company Intranet	Bev Bailey	July 2014	March 2016	Implementation	0 %	\$ -1,000,000	-1,000,000		\$ 0	\$ 1,000,000	\$ 0
●	ACME Intranet	Bev Bailey	July 2014	March 2016	Kick-off	0 %	\$ -760	-760	10 %	\$ 0	\$ 35,000	\$ 759
●	AP Web Interface	Joseph Banks	October 2015	December 2016	Kick-off	0 %	\$ 0	0	10 %	\$ 0	\$ 0	\$ 0
●	APO - Pilot	Joseph Banks	March 2015	May 2016	Kick-off	0 %	\$ 1,099,536	1,099,536	10 %	\$ 0	\$ 463,747	\$ 53,516
●	APO Infrastructure	Joseph Banks	October 2014	March 2015	Kick-off	0 %	\$ -15,950	-15,950	10 %	\$ 0	\$ 0	\$ 15,949

Make any modifications that you want. Column headers contain text fields or list boxes that allow you to perform additional filtering. A column's context menu appears when you click the right side of the column header. The menu lets you choose the sort order or make columns visible or invisible. The columns can be re-sized by moving the line between them. You can also reorder the columns by dragging them.

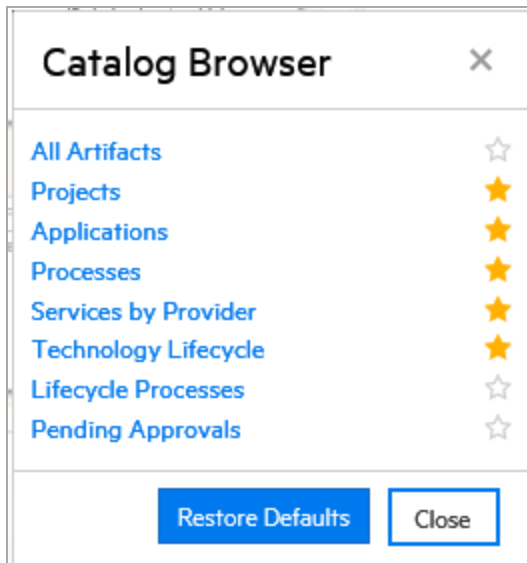
Viewing Artifact Reports

To view artifact reports:

1. Log in to Cloud Assessment and select the Reports tab.
2. Select the **All Reports > Artifact Reports** menu, which shows any favorite reports as well as a **Show More** link.



- Click Show More to open the catalog browser. The catalog browser lists all reports and also allows you to pin or unpin a particular report as a favorite onto the Artifact Reports menu.



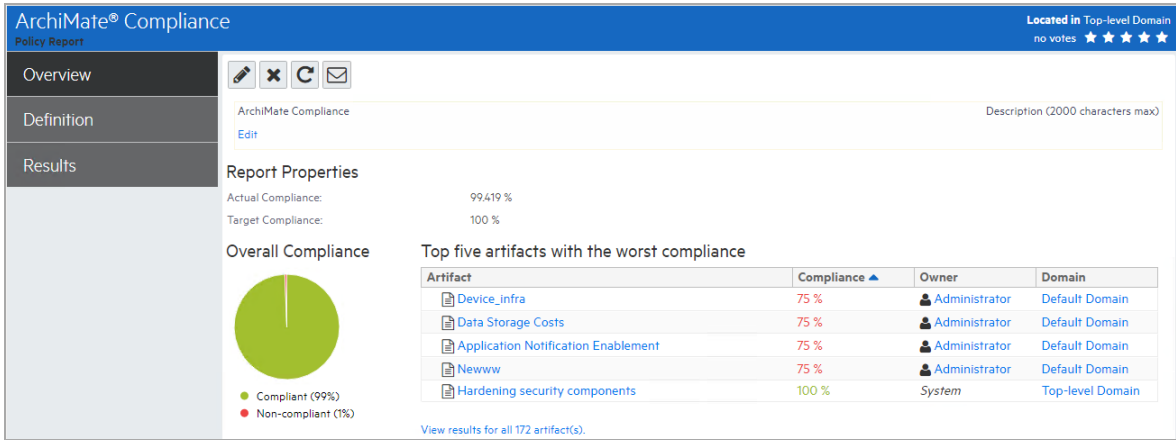
- Click Projects to view the artifact report called Projects, which is used to review projects and their status and content data. The Projects report is a table with columns that were defined by associated DQL queries as depicted in previous topic.

Health	Name	Manager	Planned St...	Planned Fi...	Lifecycle S...	Compl...	NPV	ROI	Discount ...	Bud...	Planned ...	Actual C...
●	A/R Billing Upgrade	Joseph Banks	March 2015	July 2016	Kick-off	0 %	\$ 3,282,000	3,282,000	10 %	\$ 0	\$ 1,121,000	\$ 1,213,000
●	ab - test	Joseph Banks	March 2015	May 2016	Kick-off	0 %	\$ 1,121,009	1,121,009	10 %	\$ 0	\$ 465,219	\$ 53,516
●	ACME Company Intranet	Bev Bailey	July 2014	March 2016	Implementat...	0 %	\$ -1,000,000	-1,000,000		\$ 0	\$ 1,000,000	\$ 0
●	ACME Intranet	Bev Bailey	July 2014	March 2016	Kick-off	0 %	\$ -760	-760	10 %	\$ 0	\$ 35,000	\$ 759
●	AP Web Interface	Joseph Banks	October 2015	December 2...	Kick-off	0 %	\$ 0	0	10 %	\$ 0	\$ 0	\$ 0
●	APO - Pilot	Joseph Banks	March 2015	May 2016	Kick-off	0 %	\$ 1,099,536	1,099,536	10 %	\$ 0	\$ 463,747	\$ 53,516
●	APO Infrastructure	Joseph Banks	October 2014	March 2015	Kick-off	0 %	\$ -15,950	-15,950	10 %	\$ 0	\$ 0	\$ 15,949

- Make any modifications that you want. Column headers contain text fields or list boxes that allow you to perform additional filtering. A column's context menu appears when you click the right side of the column header. The menu lets you choose the sort order or make columns visible or invisible. The columns can be resized by moving the line between them. You can also reorder the columns by dragging them.

Policy Reports

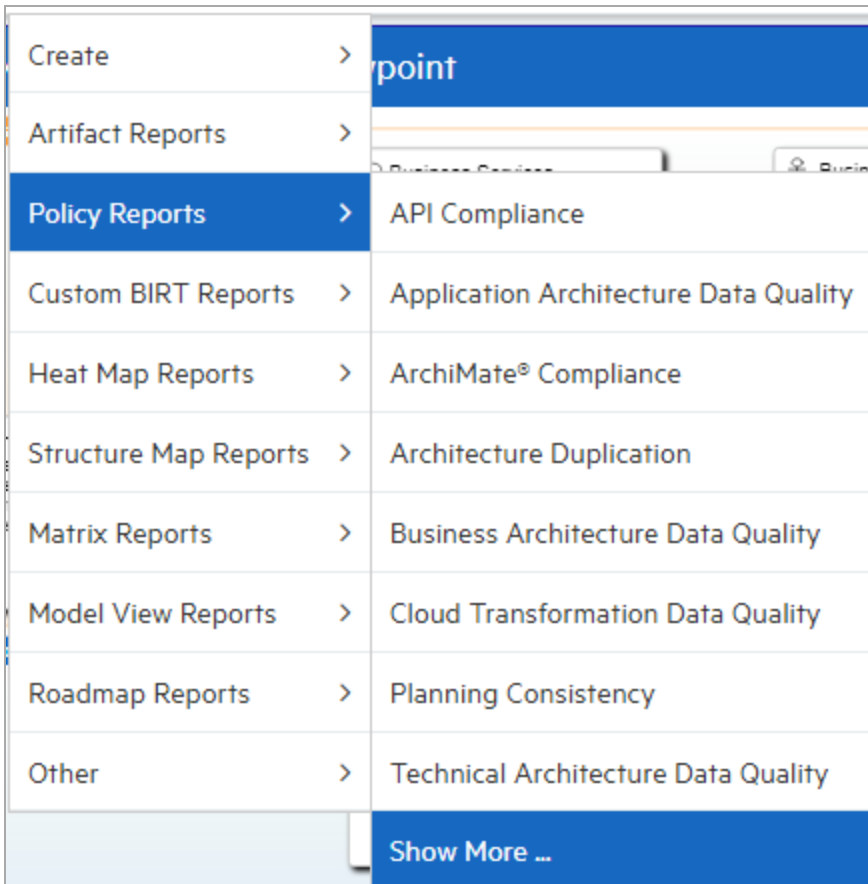
Cloud Assessment policy reports are used to report the levels of policy compliance of the artifacts in Cloud Assessment repository. The report is designed and used directly in the Cloud Assessment web UI. You can select the policies to validate as well as the filter that specifies what artifacts and data to include in the validation directly in the web UI when you define the report. The report's results are cached in the Cloud Assessment repository. Users always view results from the most recent calculation of the report.



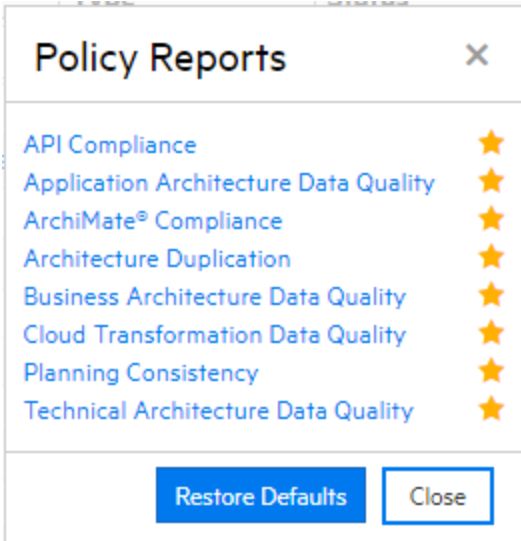
Viewing Policy Reports

To view policy reports:

1. Log in to Cloud Assessment and select the Reports tab.
2. Select the **All Reports > Policy Reports** menu, which shows any favorite reports as well as a Show More link.



- Click **Show More** to open the catalog browser. The catalog browser lists all reports and also allows you to pin or unpin a particular report as a favorite onto the Policy Reports menu.



- Select **ArchiMate Compliance** to view the policy report called Archimate Compliance.

ArchiMate Compliance Report Structure

The Archimate Compliance policy report consists of three sub-reports:

- Overview:** shows the percentage of compliant and non-compliant artifacts in a pie chart as well as a list of the top 5 artifacts with the worst compliance level. It is accessible when you click the Overview on the left side of the report page.

Artifact	Compliance	Owner	Domain
Device_infra	75 %	Administrator	Default Domain
Data Storage Costs	75 %	Administrator	Default Domain
Application Notification Enablement	75 %	Administrator	Default Domain
Newwww	75 %	Administrator	Default Domain
Hardening security components	100 %	System	Top-level Domain

- Results:** shows an index table with columns containing clickable artifact names, artifact types, compliance status (Compliant/Non-Compliant), artifact compliance (0 – 100 percent), number of problems found, and a link to details about policy calculations. It is accessible when you click the

Results tab on the left side of the report page.

Artifact	Type	Status	Complian...	Problems	Owner	Domain
Newww	Business Service	Non-compliant	75 %	1	Administrator	Default Domain
Application Notification Enable...	Business Function	Non-compliant	75 %	1	Administrator	Default Domain
Data Storage Costs	Application Comp...	Non-compliant	75 %	1	Administrator	Default Domain
Device_infra	Business Service	Non-compliant	75 %	1	Administrator	Default Domain

- **Artifact Results:** shows a table with policy calculation details by artifact. Each row of the table represents a technical policy included in the report definition. It contains a clickable name, compliance status, and the number of errors and warnings. It is accessible when you click on the View Report link in any Results row or the Overview sub-report.

Artifact	Type	Status	Compli...	Problems	Owner	Domain
Recent technology	Principle	Compliant	100 %	0	System	Top-level Domain
Drill down for details	Principle	Compliant	100 %	0	System	Top-level Domain
See artifact compliance in other reports	Principle	Compliant	100 %	0	System	Top-level Domain
View artifact in catalog	Principle	Compliant	100 %	0	System	Top-level Domain
Support error situations	Principle	Compliant	100 %	0	System	Top-level Domain
Network Zone Filtering	Principle	Compliant	100 %	0	System	Top-level Domain
Identity management leads	Principle	Compliant	100 %	0	System	Top-level Domain
Durability	Principle	Compliant	100 %	0	System	Top-level Domain

Policy	Status	Errors	Warnings
Administrator Should Not Be Artifact Owner	Non-Compliant	1	0
Artifact Relationships Should Be ArchiMate Compliant	Compliant	0	0
Integrity Constraints	Compliant	0	0

Non compliant artifacts have a plus (+) symbol. Click to expand and see full textual description of all errors and warnings.

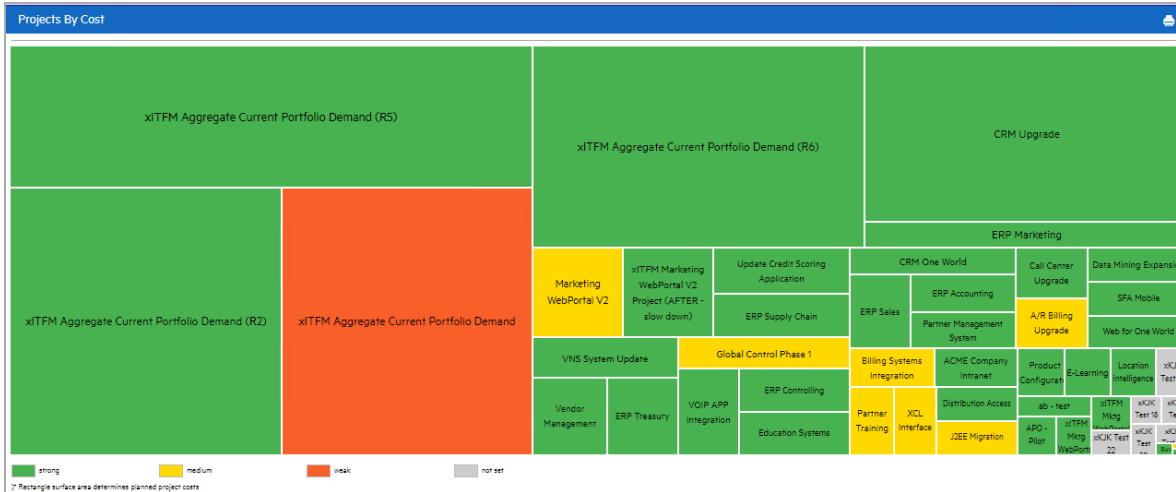
Policy	Status	Errors	Warnings
Administrator Should Not Be Artifact Owner	Non-Compliant	1	0
Owner of this artifact is a member of Administrator role. This happens after import from an external source where the owner isn't known and causes problems when the artifact needs to be updated - it requires administrative privileges then.			
Artifact Relationships Should Be ArchiMate Compliant	Compliant	0	0
Integrity Constraints	Compliant	0	0

Heat Map Reports

You can use the Cloud Assessment heatmap portlet to create graphs of your data where individual values contained in a matrix are represented as colors. Planned cost is shown by the relative size of the rectangular areas and project health is shown by the color shading of the rectangles. Heatmap reports are updated immediately when there is a change in the data reported. Cloud Assessment provides three Heatmap reports out of the box:

- Applications by Cost report – shows the Annual Cost Total(s) of selected projects.
- Projects by Cost report – shows Planned Cost of selected projects (shown).
- Installed Software report – shows Lifecycle Stage of selected System Softwares.

A Heat Map is defined in the web UI using a managed server-side script that specifies how the data and its two dimensions (that is, planned cost and project health) are calculated and visualized. The Heat Map is also shown directly in the web UI, either as a portlet (an area of the Cloud Assessment home page) or as a standalone report. Heat Map reports are recalculated every time the user accesses the report's web UI page.

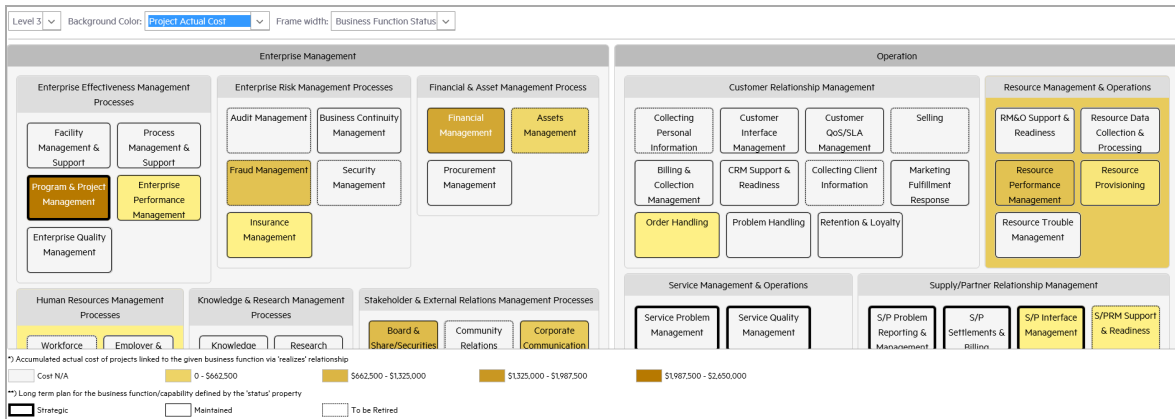


Structure Map Reports

As a Cloud Assessment administrator, you can use Cloud Assessment to create a structure map of artifacts by business function, which allows you to view the relationships between artifacts and the status of each artifact. Users can group artifacts by defining DQL queries and colors, and can modify the way that artifacts are displayed by using a color renderer and legend renderer.

Another way to characterize structure map reporting is as a boxed visualization of a data tree structure. You can use a structure map to model business capabilities, but the visualization itself is not restricted to business capabilities. Each rectangular area contains boxes that can be nested several levels. Boxes can be decorated to show dimensions of input data by using background colors or border lines of varying widths. Unlike the heap map report, the area size of a box is calculated to fit. Several levels of boxes are shown at the same time.

For example, an out-of-box Capabilities to project mapping structure map report shows business functions as nested boxes. The box's background color represents the cost of the projects allocated to a business function. The box's bold frame indicates that the function is going to retire.



A structure map is defined in the web UI using a managed server-side script that specifies how the data and its dimensions are calculated and visualized. The structure map is shown directly in the web UI, either as a portlet (an area of the Cloud Assessment home page) or as a standalone report. Structure map reports are recalculated every time the user accesses the report's web UI page.

Custom BIRT Reports

You can use the Cloud Assessment Workbench to design custom reports. The reports are defined and executed using Eclipse's BIRT, which is a very powerful reporting system that includes the reporting features such as report layout, data access, and scripting. For more information, see <http://www.eclipse.org/birt/> where you can find details about the technology used and a few report examples.

BIRT report definitions can be deployed and used in Cloud Assessment. The BIRT execution engine is part of Cloud Assessment and the report definitions are executed to create a custom report. Custom reports are cached in Cloud Assessment and you can access them directly in the Cloud Assessment web UI. Unlike other reports, custom reports are provided as standalone documents (PDF or HTML) that can be easily downloaded from Cloud Assessment.

Project Roadmap Reports

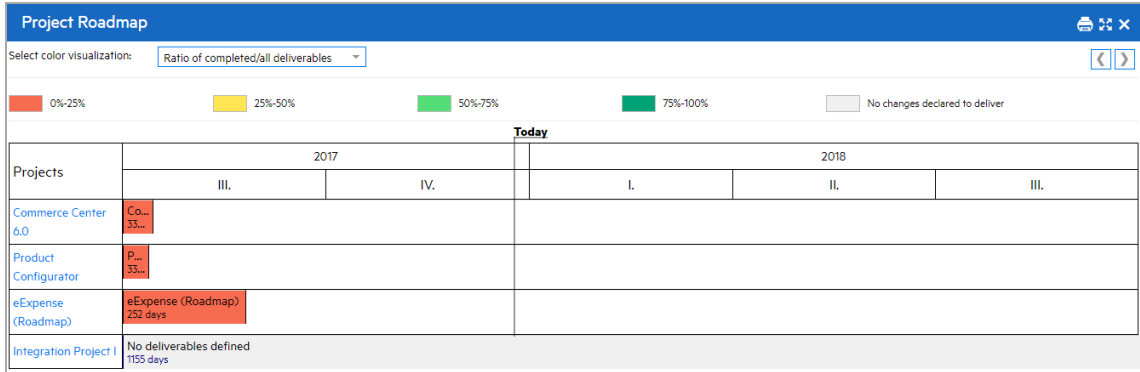
Cloud Assessment Roadmap reports provide quarter wise view of the projects and their deliverables over a period of one year. The report gives a quick snapshot of the project status; the project links help navigate to the project/deliverable page directly. The number of days along below the deliverable on the report represents the time it took for the deliverable to get completed.

Hover over the deliverable box to see the following :

- Start Date and End date based on which the number of days are calculated and displayed with the artifact.
- Number of prerequisites required by the deliverables.
- Number of delivered architecture changes for the deliverable.

Select any of the following options from the **Select color visualization** drop down to change the visualization of the deliverables:

- Ratio of completed/all deliverables: displays percentage of completed architecture changes.
- Ratio of completed/all prerequisites: displays percentage of completed prerequisite architecture changes.
- Project health: displays overall health of the project associated with the deliverable.

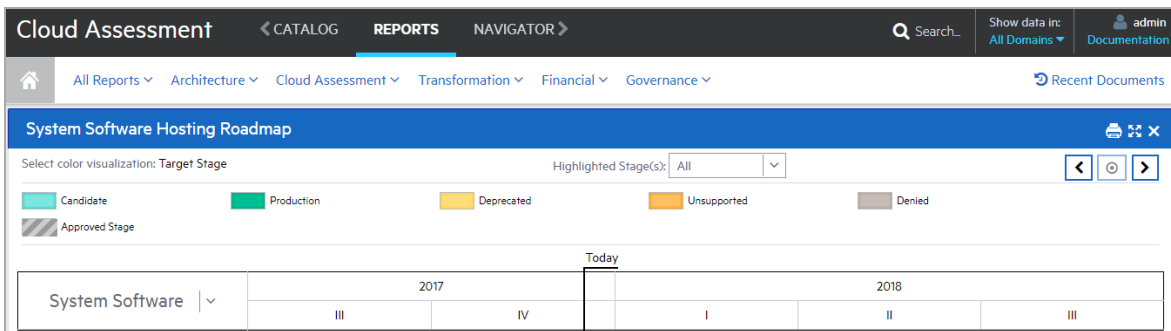


Lifecycle Plan Roadmap Report

Cloud Assessment Lifecycle Plan Roadmap reports provide quarterly wise view of the architecture changes over a period of one year. These reports are built on top of the respective lifecycle plan changes to give a quick snapshot of planned or ongoing changes.

The lifecycle plan for each change is visualized by individual stages on the report. The stages show the number of days it took for the changes to get done (this number is not available on the last stage). Hover over a stage to see more information, such as the plateau where the stage is planned, and start and end dates of the stage.

Lifecycle Plan Roadmap report for System Software is available by default in Cloud Assessment. This report is designed in such a way that it can be used to build similar roadmap reports for other artifact types such as Application Component etc.



Cloud Transformation Reports

Cloud Transformation provides the following reports:

- [Cloud Transformation Status](#), below
- [Cloud Transformation Map](#), on the next page
- [Cloud Transformation Data Quality](#), on the next page

Cloud Transformation Status

This report provides an overview of cloud assessment based on the scores.

Cloud Transformation Status									
Assessment			Financial		Technical		Show more information		
Application Name	Version	Owner	Business Score	Financial Score	Technical Score	Overall Score	Recommendation	Current Hardware Cost	Transformation Strategy
ASAC	1	Joseph Banks	83	N/A	25	36	Re-architect	\$56,9127	Automated
ASCENT	1	Nicole Smith	38	93	91	74	Private Cloud	\$289,260	Transform
ASCENT DB	1.0	Bev Bailey	N/A	N/A	N/A	0	N/A	N/A	Transform
ASCENT Web	1.0	Bev Bailey	N/A	N/A	N/A	0	N/A	N/A	Transform
Agresso	3.1	Nicole Smith	54	82	54	63	Private Cloud	Est. \$253,319	Transform
Analyst Research	0.2	Nicole Smith	41	62	73	59	Private Cloud	\$950,000	Analyze
Beta Sailtom	1.4	Joseph Banks	59	75	60	65	Private Cloud	Est. \$89,604	Ignored
Betatraxtouch	1	Mary River	62	77	N/A	46	N/A	\$245,093	Ignored
Billing	5.2	Joseph Banks	50	20	23	31	Re-architect	\$170,000	Automated
Biola	1	Andy Miller	58	16	50	41	Private Cloud	Est. \$36,173	Ignored
Brand Management	6.2	Mary River	44	23	56	41	Private Cloud	Est. \$10,832	Postpone
BrandMart	9.1	Dave Olson	57	29	42	42	Private Cloud	Est. \$95,764	Automated

In this report:

- **Minimum Estimated Hardware Cost**

The lowest cost amongst those offered by data centers. For a specific deployment, the cost is calculated on Total estimate for all deployments (infrastructure services) of the application component. If there is no cost for this estimate type (for example: when the application component has no associated deployment or the deployment has no specified server class), the estimated cost from the number of servers property and server class relationship is used. For more details, see [How cost estimation works, on page 73](#).

The calculation algorithm is the same as in Financial Alignment of the application component in the Cloud Transformation tab .

- **Current Hardware Cost Estimate**

Sum of the costs of deployment for all deployments (infrastructure services) into the current data center. Again if no infrastructure services are available, estimate from number of servers property and server class is used. For more details, see [How cost estimation works, on page 73](#).

- **Current Hardware Cost**

Annual Hardware Cost from current financial profile. If not available, this column displays Current Hardware Cost Estimate (prefixed with 'Est.').

- **Savings Opportunity**

The amount an organization saves by running the application on the lowest cost data center on an annual basis.

Calculated as follows:

$$\text{Savings Opportunity} = \text{Current Hardware Cost} - \text{Minimum Estimated Hardware Cost}$$

If the savings opportunity is negative, this column displays \$0 instead.

- **ROI (5 years)**

Ratio of cost saved over transformation cost invested for a period of 5 years. A result of 100% or above indicates a worthy investment while less than 100% indicates unworthy investment.

Calculated as follows:

$$ROI (5 \text{ years}) = 100 * [(5 * Savings Opportunity) - Transformation Cost] / Transformation Cost$$

- **Transformation Strategy**

Transformational strategies associated with the applications as a result of cloud assessment.

Changing a value in this column, also changes the property's value in the application component.

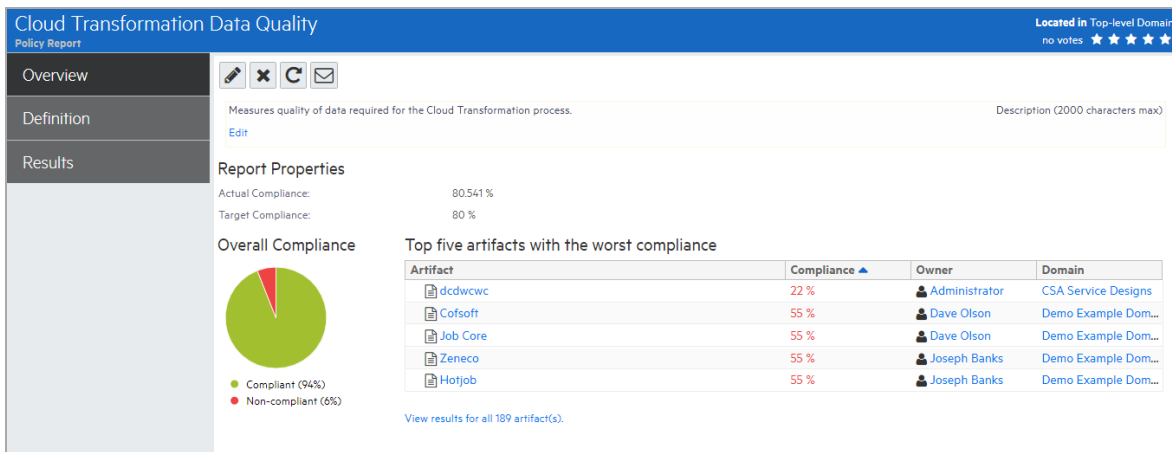
Cloud Transformation Map

This report visualizes applications suitable for cloud transformation in heat map style.



Cloud Transformation Data Quality

This report provides the level of data quality as policy compliance.



Chapter 5: Enterprise Architecture

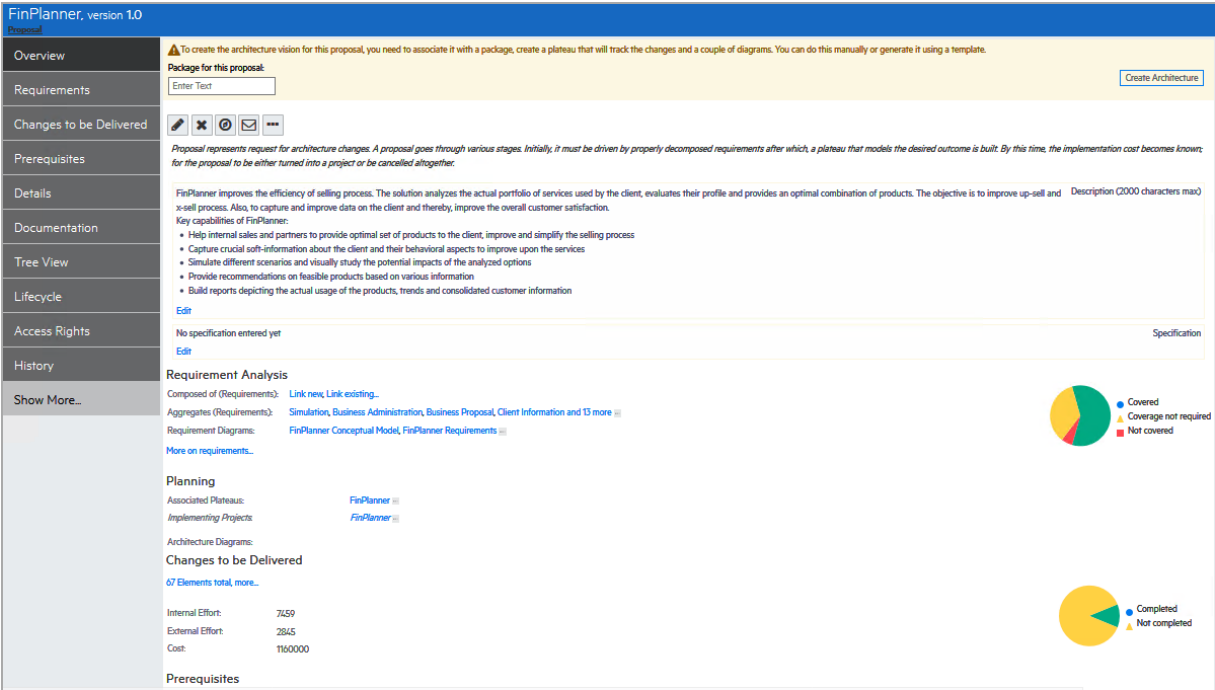
In Cloud Assessment you can create an architecture from a proposal which enables you to not only manage the demands of the users but at the same time be able to exercise better control over the project's progress.

Proposal

Proposal is created as an integral part of architecture management to capture and cover the organizational demands of the users more effectively. In doing so, proposal offers a comprehensive solution which clearly defines the project, and provides a definite and logical course of action with a clear structure. This comprises of work breakdown structure involving: initiating plans, setting milestones and executing projects. Proposal is split across requirements for better manageability. The proposal architecture can be created manually or auto generated through a defined template.

The proposal architecture essentially consists of the following elements:

- Package: created to deliver clear business value, linked to the proposal representing a program, project, milestone or task. This package can be auto generated with links to diagrams and plateaus.
- Diagrams: created to describe the proposal architecture state, modeled as diagrams showing the baseline and to-be architectures.
- Plateaus: created to show the aggregate of elements marked with financial data expressing cost and effort. The elements of plateau are mapped to the requirements so the information of how a requirement is fulfilled is traceable in the architecture. It includes *Changes to be Delivered* which are the goals or objectives in terms of the task or project.



Once the architecture is created user can build upon it further by adding *Target Architecture Changes* (in case of plateau), and *Delivered Architecture Changes* (in case of deliverable). Alternatively, the changes can be modeled in Sparx EA in the following manner:

1. Import data from Cloud Assessment
2. Model the target architecture in Sparx EA
3. Export data back to Cloud Assessment

Overview	Delivered Architecture Changes											
Requirements	Here you can see a list of architecture changes that needs to be delivered by this proposal. Each change is declared within a plateau which represents a stable state of the enterprise architecture. To alter the costs of the architecture change you need to open the plateau which declares it.											
Changes to be Delivered	<div style="text-align: right;">Search... </div>											
Prerequisites	Name	Type ↓	Version	Owner	Plateau	Last Approved	Target Stage	Internal Effort	Ext. Effort	Cost	Compliance	Completion Status
Details	Application server	Infrastructure S...	N/A	Nico...	FinPlanner	Not assigned		50		100000		Not completed
Documentation	SQL Server Database	Infrastructure S...	N/A	And...	FinPlanner	Not assigned		10				Not completed
Tree View	FinPlanner Data	Data Object	1.0	Jose...	FinPlanner	Not assigned		10				Not completed
Lifecycle	Product	Data Object	1.0	Dav...	FinPlanner	Not assigned						Not completed
Access Rights	Contract Request	Data Object	1.0	Jose...	FinPlanner	Not assigned						Not completed
	Contract	Data Object	1.0	Jose...	FinPlanner	Not assigned						Not completed
	Collecting Information about Client's OFI Produ...	Business Service	1.0	Jose...	FinPlanner	Candidate	Production		50			Not completed
	FinPlanner Access from from internal Bank Sys...	Business Service	1.0	Jose...	FinPlanner	Candidate	Production	50				Not completed
	Management of Investment Profile	Business Service	1.0	Mar...	FinPlanner	Candidate						Not completed
	Get Client's FinBank Product Portfolio	Business Service	1.0	Jose...	FinPlanner	Candidate	Production	40				Not completed

From proposal high level managers get an overall view on the following aspects:

- Requirement structure and other elements of the proposal on a single page.
- Project health of the proposal by reviewing the completion status.
- Planned architecture devised by other proposals or projects.
- Architecture changes to be delivered.
- Compliance status of architecture changes based on policies.
- Total cost, efforts of architecture changes and their details.

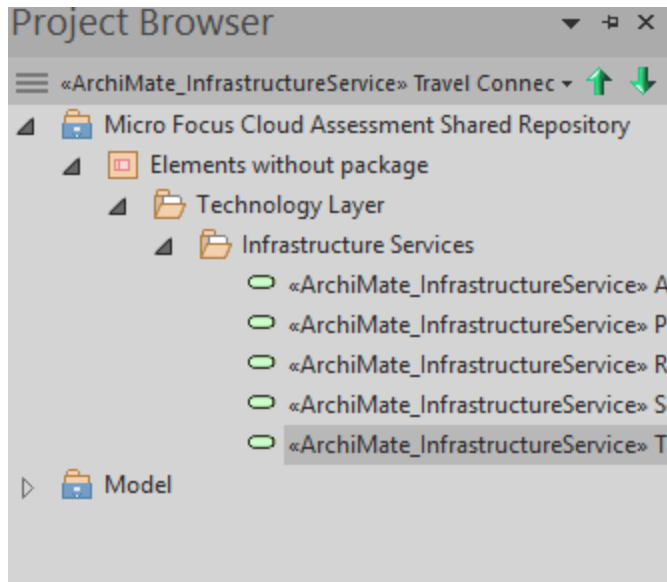
In Cloud Assessment, the to-be architecture can be created and monitored automatically using Micro Focus best practices. For details, refer to following topics:

- [Creating Proposal, on the next page](#)
- [Creating Project from Proposal, on page 64](#)
- [Setting Target Architecture, on page 65](#)
- [Setting Efforts of Architecture Changes, on page 67](#)
- [Monitoring Architecture Changes, on page 67](#)

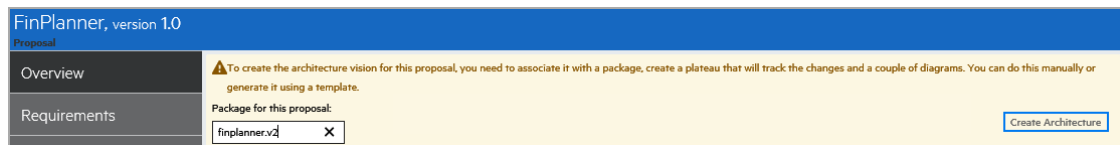
Creating Proposal

An enterprise architect helps build an architecture vision in the following manner:

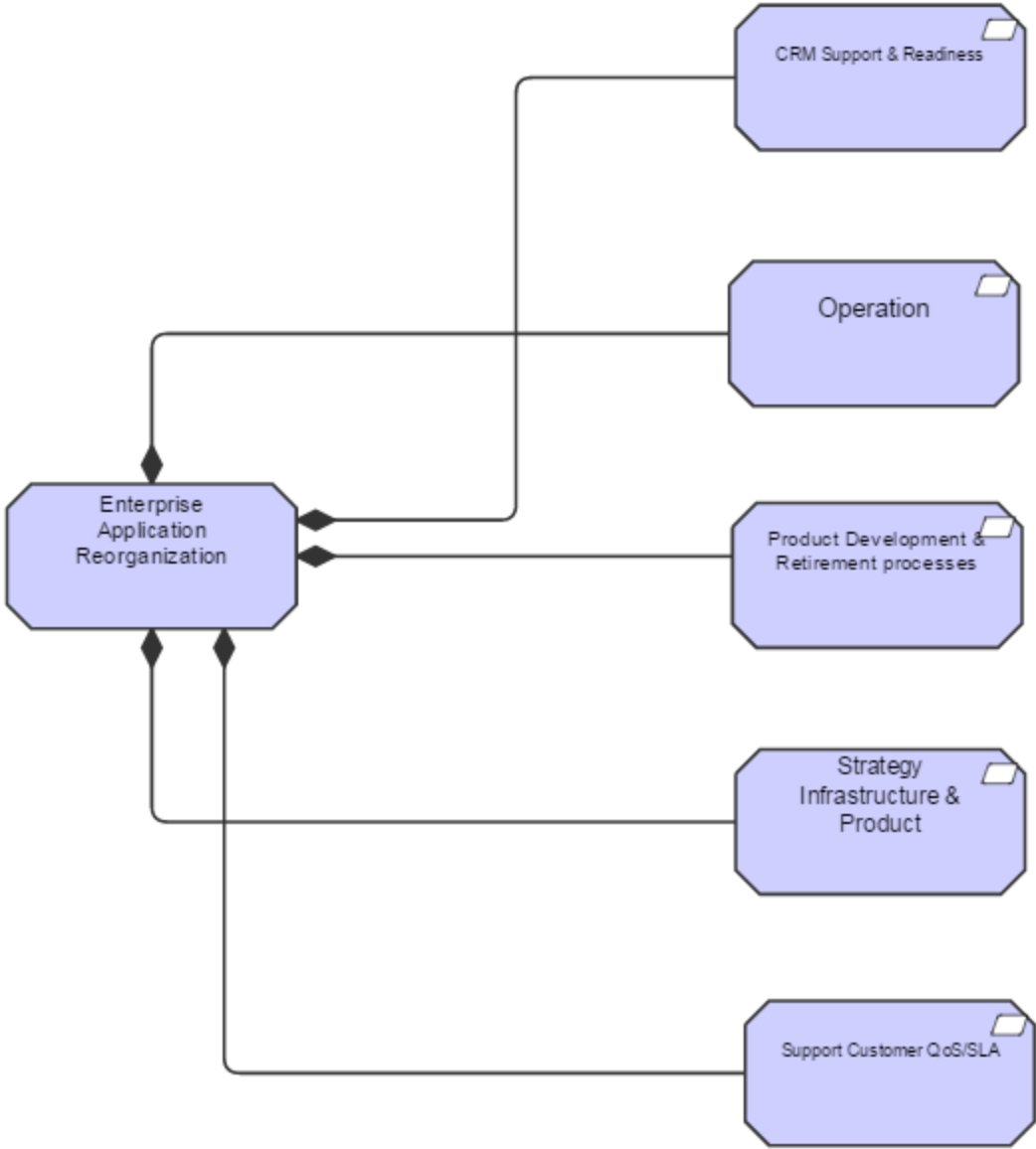
1. Generates a basic proposal document structure, which includes a requirement structure diagram, and a solution plateau together with a diagram that is visualizing the plateau.



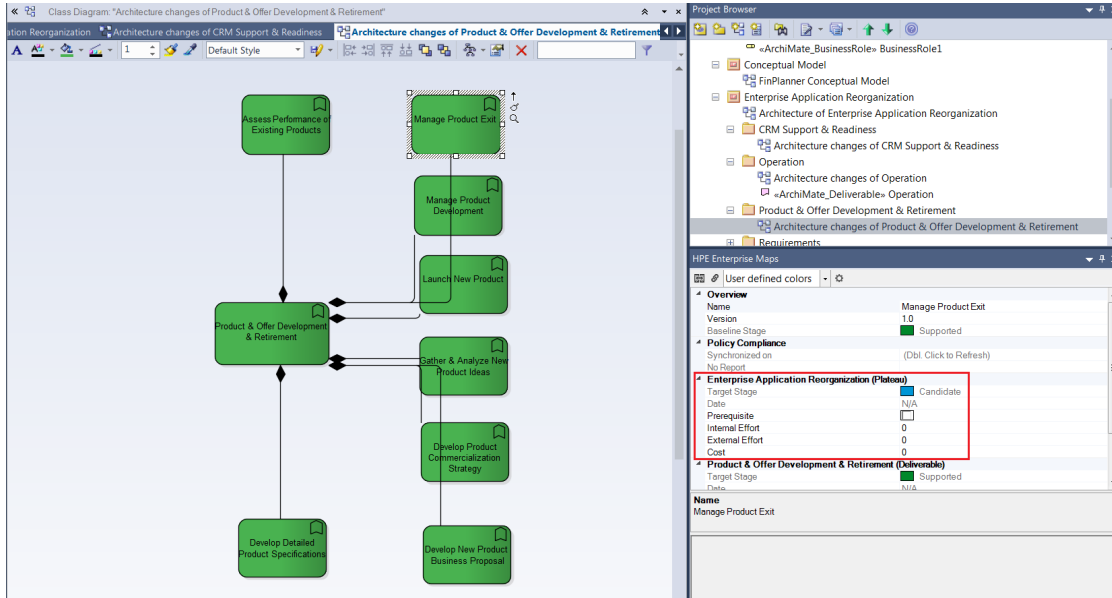
2. You can start by defining a package that is used as a container for data related to the proposal. The package is also represented as a package folder in the **Extension for Sparx Systems EA** later on.



3. Once the proposal has the structure defined, the architect or the proposal owner is using the [Extension for Sparx Systems EA](#) , on [page 126](#) to decompose the requirements. You can see that the aggregation/composition relationship is used for the decomposition.



- 4. Then, the architect defines the solution plateau using the **Extension for Sparx Systems EA**. While doing so you can assign the values for the estimates on the effort needed to build the solution.



- The architect links the solution components to the requirements created in step 3 above. Once this is done it is possible to monitor the requirement coverage on the **Requirements** tab of the proposal.

FinPlanner, version 1.0					
Proposal					
Overview	Requirement Coverage				
Requirements	Name	Requires Coverage	Covered by	Status	Description
Changes to be Delivered	Simulation	No		Not Required	
	Define parameters	Yes	FinPlanner - Frontend	Covered	
	Simulation processing	Yes	FinPlanner - Frontend	Covered	
	Business Administration	No		Not Required	

- In Cloud Assessment, for each element in the plateau (on plateau catalog page) it is possible to assign a lifecycle stage that is reached when the proposal is implemented. For example: if the element is about to be removed, the target is shown as the **retired** lifecycle stage. But if the target is a new element, it will probably be shown as the **production** stage.

Target Architecture Changes								
Name	Type	Last Approved Stage	Target Stage	Prerequisite	Internal Effort	External Effort	Cost	Completion Status
One Proposal Recalculation	Business Process	Candidate	Production	<input checked="" type="checkbox"/>	N/A	N/A	N/A	Not completed
Get Cash-Flow	Business Process	Candidate	Production	<input type="checkbox"/>	50			Not completed
Collecting Information about Cli...	Business Service	Candidate	Production	<input checked="" type="checkbox"/>	N/A	N/A	N/A	Not completed
FinPlanner Access from from Int...	Business Service	Candidate	Production	<input type="checkbox"/>	50			Not completed
Financial Review Service	Business Service	Candidate	Production	<input type="checkbox"/>	10			Not completed
Goal Acceleration	Business Service	Candidate	Production	<input type="checkbox"/>				Not completed
web pages	Application Interface		Production	<input type="checkbox"/>				Not completed
FinPlanner from Internet	Business Service	Candidate	Production	<input type="checkbox"/>		30		Not completed
Calling Appl GUI	Application Interface		Production	<input type="checkbox"/>				Not completed
Get Clients FinBank Product Pa...	Business Service	Candidate	Production	<input type="checkbox"/>	40			Not completed

- Also, on the same page certain plateau elements can be marked as **prerequisites**. These elements are handled by projects other than the current proposal or projects created on behalf of it. This ensures dependencies on other proposals / projects, visible on the **Prerequisites** tab of the

proposal.

Proposal Prerequisites

You can track dependencies of this proposal to other proposals and projects. Before all the architecture changes listed here are not completed, it is not advisable to start a project based on this proposal.

Name	Type ↓	Owner	Plateau	Realized by	Last Approved	Target Stage	Completion Status
Product modeling	Business Service	Dav...	FinPlanner	ACME Intranet	Candidate		Not completed
Create Business Proposal	Business Service	Dav...	FinPlanner	ACME Company Intranet	Candidate		Not completed
Collecting Client's Cash-FL...	Business Service	Jose...	FinPlanner	Billing Systems Integration	Candidate	Production	Not completed
Collecting Information ab...	Business Service	Jose...	FinPlanner	ACME Intranet	Candidate	Production	Not completed

Creating Project from Proposal

The Cloud Assessment proposal page allows you to automatically create a project and the associated deliverables.

To achieve this, perform the following steps:

1. Open the proposal and in the Overview tab click the link **'You can create a project for this proposal...'**. This link is available only for an empty proposal; it does not have association with any project as such.

The screenshot shows the 'Overview' tab of a proposal page. On the left is a navigation menu with tabs: Overview, Requirements, Changes to be Delivered, Prerequisites, Details, Documentation, Tree View, Lifecycle, Access Rights, History, and Show More... The main content area includes:

- Requirements:** A descriptive paragraph about the proposal's purpose and stages.
- Changes to be Delivered:** A detailed description of the solution and its objectives, with a 'Description (2000 characters max)' label.
- Prerequisites:** A list of key capabilities and a bulleted list of tasks such as 'Help internal sales and partners to provide optimal set of products to the client'.
- Requirement Analysis:** A section showing 'Composed of (Requirements): Link new, Link existing...' and 'Aggregates (Requirements): Simulation, Business Administration, Business Proposal, Client Information and 13 more'. It also includes 'Requirement Diagrams' and a 'More on requirements...' link.
- Planning:** A section for 'Associated Plateaus' listing 'FinPlanner, FinPlanner' and 'Implementing Projects' listing 'FinPlanner'.
- Legend:** A pie chart legend with three categories: 'Covered' (blue circle), 'Coverage not required' (yellow triangle), and 'Not covered' (red square).

2. Enter the project name, start date and end date.

The screenshot shows a 'Project' creation form. At the top, there is a blue header with the word 'Project' and a link 'Create new...'. Below the header, the form is organized into several sections:

- Type:** A dropdown menu currently showing 'Project'.
- Name:** An empty text input field.
- Description:** A rich text editor area with a toolbar containing icons for bold (B), italic (I), underline (U), link, unlink, a 'Metric' dropdown, and a highlighter (A).
- Version:** A text input field containing '1.0'.
- Package:** A button with a plus sign and the text 'Add'.
- Start Date:** A date picker showing 'Dec 15, 2017'.
- End Date:** An empty date picker.
- Planned Start Date:** An empty date picker.
- Planned Finish Date:** An empty date picker.
- Completion [%]:** An empty text input field followed by a '%' symbol.

This action creates a project linking it with the current proposal and for each plateau associated with the current proposal, a realizing deliverable. All elements aggregated in a plateau of proposal, are also aggregated by the corresponding deliverable of the project created.

Setting Target Architecture

Cloud Assessment makes it possible to manage architecture changes which are going to be delivered or have been delivered for a Plateau or a Deliverable respectively.

Setting Target Stage

1. In the Overview page of a plateau or deliverable, scroll down to see Target Architecture Changes or Delivered Architecture Changes.

To make changes for a specific artifact, double-click the target stage of the artifact you wish to modify and select the desired target stage.

Target Architecture Changes

All items Search...

Name	Type	Last Approved Stage	Target Stage	Prerequisite	Internal Effort
<input type="checkbox"/> JBoss 7	System Software	Production	Production	<input type="checkbox"/>	
<input type="checkbox"/> Apache Tomcat	System Software	Production	Production	<input type="checkbox"/>	
<input type="checkbox"/> MySQL DB	System Software	Production	Production	<input type="checkbox"/>	
<input checked="" type="checkbox"/> FileZilla FTP Server	System Software	Production	Production	<input checked="" type="checkbox"/>	N/A
<input type="checkbox"/> JBoss AS	System Software	Production	Candidate	<input type="checkbox"/>	
<input type="checkbox"/> Apache WebServer	System Software	Production	Denied	<input type="checkbox"/>	
<input type="checkbox"/> PostgreSQL	System Software	Production	Deprecated	<input type="checkbox"/>	
<input type="checkbox"/> Jetty WebServer	System Software	Production	Production	<input type="checkbox"/>	
<input type="checkbox"/> PostgreSQL	System Software	Production	Unsupported	<input type="checkbox"/>	
<input type="checkbox"/> PostgreSQL	System Software	Production	Production	<input type="checkbox"/>	

- To make changes to multiple artifacts at once; select the artifacts, click **Set Target Stage** icon and select the desired target.

Target Architecture Changes

All items Search...

Name	Type	Last Approved Stage	Target Stage	Prerequisite	Internal Effort
<input checked="" type="checkbox"/> One Proposal Recalculation			Candidate		
<input checked="" type="checkbox"/> Get Cash-Flow			Candidate		
<input checked="" type="checkbox"/> Collecting Information about...			Candidate		
<input type="checkbox"/> FinPlanner Access from from...			Candidate		
<input type="checkbox"/> Financial Review Service			Candidate		
<input type="checkbox"/> Goal Acceleration			Candidate		

Set Target Stage >

- Denied
- Deprecated
- Development
- Draft
- Implementation
- Implemented
- Initial

NOTE:
 The list of target stages is extracted from all the lifecycle processes which are currently being published. Some of them may not be applicable to the artifacts you have selected, in which case you will get a notification in the report once the operation is finished.

- You will see a summary of the status which shows the stage as successfully set and/or skipped.

Setting Target Stage finished. Result: 3 successful. [Click here for detailed report.](#)

The stages which are not applicable for certain artifacts are automatically skipped; these are those artifacts which are not under governance. There are other artifacts which are under governance but the governing process does not contain the selected stage, those also, are skipped.

- Click to see detailed report of the artifacts with the status.

Setting Target Stage
Report

Finished (started by Administrator, 1:19:12 PM)
3 successful.

<input type="checkbox"/>	Name	Artifact Type ▲	Status
<input type="checkbox"/>	Calling Appl GUI	Application Interface	Successful
<input type="checkbox"/>	Financial Review Service	Business Service	Successful
<input type="checkbox"/>	Goal Acceleration	Business Service	Successful

Setting Efforts of Architecture Changes

Cloud Assessment allows users to manage costs, and internal and external effort of the architecture changes. To do this, open the respective plateaus which define the architecture changes and then enter the data. This helps speed up the evaluation process and assists stakeholders make some key decisions.

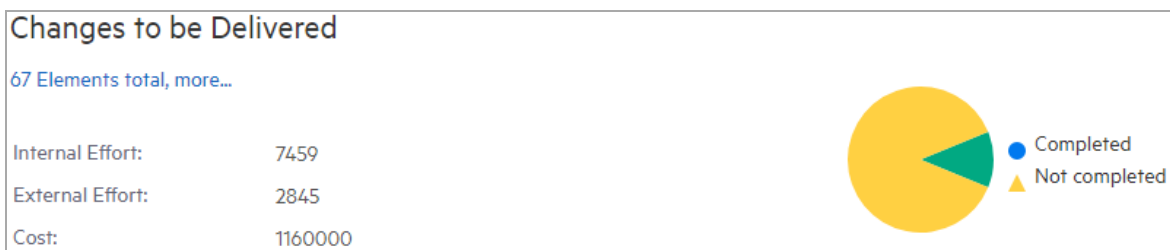
Target Architecture Changes

<input type="checkbox"/>	Name	Type	Last Approved Stage	Target Stage	Prerequisite	Internal Effort	External Effort	Cost	Completion Status ↓
<input type="checkbox"/>	One Proposal Recalculation	Business Process	Candidate	Production	<input checked="" type="checkbox"/>	N/A	N/A	N/A	● Not completed
<input type="checkbox"/>	Get Cash-Flow	Business Process	Candidate	Production	<input type="checkbox"/>	50			● Not completed
<input type="checkbox"/>	Collecting Information about ...	Business Service	Candidate	Production	<input checked="" type="checkbox"/>	N/A	N/A	N/A	● Not completed
<input type="checkbox"/>	FinPlanner Access from from...	Business Service	Candidate	Production	<input type="checkbox"/>	50			● Not completed
<input type="checkbox"/>	Financial Review Service	Business Service	Candidate	Production	<input type="checkbox"/>	10			● Not completed
<input type="checkbox"/>	Goal Acceleration	Business Service	Candidate	Production	<input type="checkbox"/>				● Not completed
<input type="checkbox"/>	web pages	Application Interface		Production	<input type="checkbox"/>				● Not completed
<input type="checkbox"/>	FinPlanner from Internet	Business Service	Candidate	Production	<input type="checkbox"/>		30		● Not completed
<input type="checkbox"/>	Calling Appl GUI	Application Interface		Production	<input type="checkbox"/>				● Not completed
<input type="checkbox"/>	Get Client's FinBank Product ...	Business Service	Candidate	Production	<input type="checkbox"/>	40			● Not completed

Monitoring Architecture Changes

The proposal owner can monitor the following aspects:

- The overall aggregated cost and effort required to implement the proposal



- The progress of the process:
 - This is possible if a link is setup from PPM to Cloud Assessment ().
 - Monitoring compliance of the solution to company policies.

The screenshot shows a web interface for 'Enterprise Application Reorganization, version 1.0'. The top navigation bar includes the title and 'Proposed' status. A sidebar on the left contains menu items: Overview, Requirements, Changes to be Delivered, Prerequisites, Details, Documentation, Tree View, Lifecycle, and Access Rights. The main content area is titled 'Delivered Architecture Changes' and contains a table with the following columns: Name, Type, Version, Owner, Plateau, Last Approved, Target Stage, Internal Effort, Ext. Effort, Cost, Compliance, and Completion Status. The table lists 10 items with various completion statuses (Completed, Not completed, Candidate, Retired). A search bar is located at the top right of the table area. The bottom of the interface shows navigation controls and a page indicator 'Displaying 1 - 10 of 27'.

Name	Type ↓	Version	Owner	Plateau	Last Approved	Target Stage	Internal Effort	Ext. Effort	Cost	Compliance	Completion Status
Supply Chal...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Supported	15				Completed
Launch New...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Candidate					Not completed
Develop Ne...	Business Functi...	1.0	And...	Enterprise Appli...	Deprecated	Supported					Not completed
Marketing &...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Retired					Not completed
Resource De...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Supported					Completed
Strategy Infr...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Supported	10		50000		Completed
Develop Res...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Candidate					Not completed
Develop Pro...	Business Functi...	1.0	And...	Enterprise Appli...	Deprecated	Supported		300			Not completed
Manage Pro...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Supported					Completed
Develop Det...	Business Functi...	1.0	And...	Enterprise Appli...	Supported	Supported		20			Completed

Chapter 6: Cloud Transformation

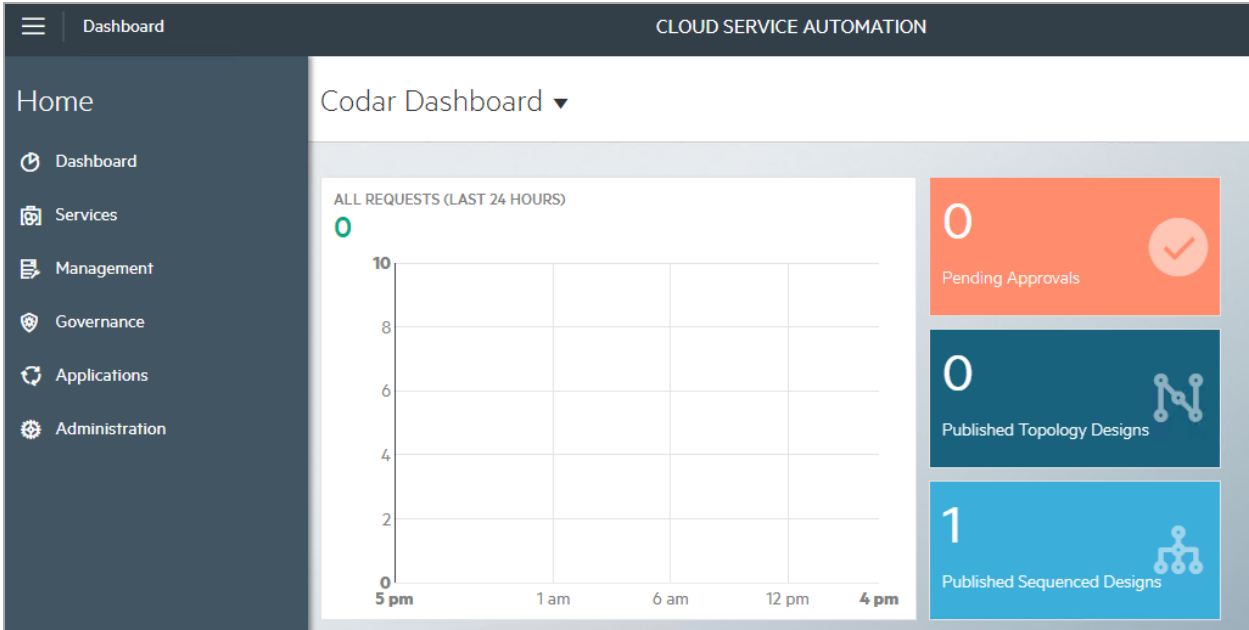
For a detailed overview of this topic refer to "Cloud Transformation" in the *Concepts Guide*.

This section covers the following 4 topics:

- [Accessing from Micro Focus HCM \(Cloud Service Automation\), below](#)
- [Cloud Transformation Guide, below](#)
- [Estimating Cost of Deployment, on page 71](#)
- [Service Design Publishing, on page 75](#)

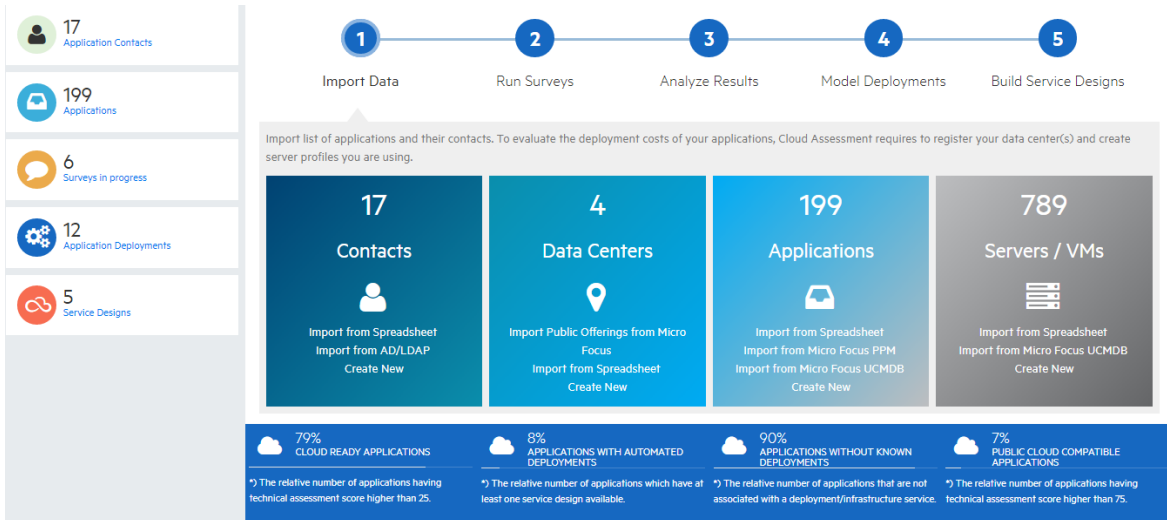
Accessing from Micro Focus HCM (Cloud Service Automation)

Micro Focus Cloud Assessment (Cloud Assessment) manages centralized Business Model that links with Micro Focus HCM (CSA) and Micro Focus CODAR products. In the Micro Focus HCM (CSA)/CODAR homepage, navigate to **Cloud Transformation** tile to access **Cloud Transformation Guide** and **Cloud Transformation Reports**.



Cloud Transformation Guide

The Cloud Assessment Cloud Transformation Guide functions like a wizard and comprises of 3 separate panels. The wizard runs you through the cloud transformation process. This process helps provide insights into status of IT infrastructure.



The 3 panels of the guide are:

- Left panel: statistics of applications and associated deployments
- Middle panel: wizard to build up reference models and service designs
- Bottom panel: recommended Cloud platforms based on KPIs

Left Panel

Concept	Description
Application Contacts	All contacts.
Applications	All application components.
Surveys in-progress	Surveys currently open.
Application Deployments	Infrastructure services representing deployments of applications.
Service Designs	Infrastructure services representing HCM (CSA) service designs (in HCM (CSA) Service Designs domain).

Middle Panel

Step	Description
Import Data	Publish data through Catalog UI or from CSV, PPM and UCMDB.
Run Surveys	Start surveys for applications. Each survey generates scores relevant to the survey perspective.
Analyze Results	View Cloud Transformation Status and Cloud Heat Map reports.
Model Deployments	Build up deployments from Sparx Systems EA or import them from Spreadsheets.

Middle Panel, continued

Build Service Designs	Create topology service designs in HCM (CSA).
-----------------------	---

Bottom Panel

Concept	Description
Cloud Ready	Application components having Technical Alignment above 25%. This default value can be customized. The technical alignment score is generated after respondents fill in Cloud Technical Survey.
Automated Deployments	Application components having a service design associated.
Without Known Deployments	Application components with no deployments associated.
Public Cloud	Application components having Technical Alignment above 75%. This default value can be customized. The technical alignment score is generated after respondents fill in Cloud Technical Survey.

Estimating Cost of Deployment

Cloud Transformation UI provides 2 types of estimation for deployment cost:

1. Rough: based on required Server Class and estimated number of servers.
2. Detailed: based on deployment model.

For rough estimation:

1. Open the Application Component.
2. Go to Cloud Transformation tab and click **Financial Alignment** sub tab.
3. In **Estimated Number Of Servers** field click **Edit** and enter a number here.
4. In the **Compatible Operating Systems** field select the Operating System required. If no selection is made, the estimation assumes that the application component can run under any operating system.
5. In **Default Server Class** field click **Link Existing** and select a Server Class.

6. Once all the details are entered, the UI refreshes to show the estimated cost.

To migrate an application into cloud you need to verify that the application is compatible with such a deployment model. For example the application must support execution on a virtual machine on the other hand the target deployment environment must meet the application security and performance requirements. To get this information fill-in the surveys that will guide you through this process.

Overview | **Financial Alignment** | Business Alignment | Technical Alignment | Deployment Models

Defines alignment of this entity with possible cloud deployment from the financial perspective using a score of 0-100. High score means that resources for the transformation are available and the transformation leads to reasonable savings. These scores are calculated based on a survey *Cloud Financial Assessment*.

Show more information | Take New Survey

Financial Alignment Score: N/A

Deployment Costs

Estimate Type: Total estimate based on the number of servers property

Current Data Center: Internal DC

Current Costs: \$150,163

Recommended Data Center: Amazon AWS

Deployment Alternatives

Used Servers/Nodes: vmamqa279_pdp2003intnl03.labs.c0a.com

	Internal DC (Current)	Amazon AWS (Lowest Cost)	MS Azure	My VPC
Class HML (15)	\$148,363	\$42,734	\$82,723	\$73,873
Networking	\$1,800	\$1,200	\$1,200	\$1,800
Total	\$150,163	\$43,934	\$83,923	\$75,673

Estimated Number Of Servers: 15, Edit...

Compatible Operating Systems: Microsoft Windows

Default Server Class: Class HML

) This estimate is based on the "Estimated number of servers" property of this application and relationships defining operating system and server class required to run the application.

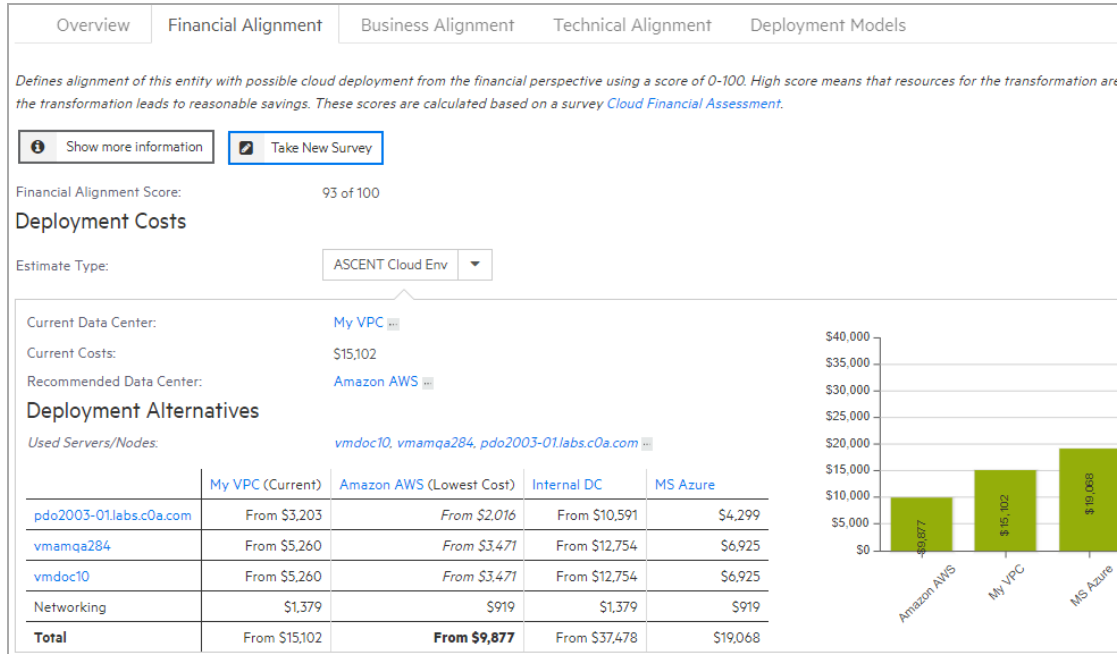
NOTE:
Most applications in Cloud Assessment demo data contain a rough estimation. See one of the examples such as ASAC.

For detailed estimation:

1. Follow [Building Reference Model for Cloud Transformation, on page 138](#) to create a reference model.
2. Go to Cloud Transformation tab of the application component and click **Financial Alignment** sub tab.
3. In **Estimate Type** field, from the drop down, select a reference model (deployment) from the drop down. The UI refreshes to show estimated cost for this reference model.

For example: the following screen shot shows the estimated cost of ASCENT application

component using *ASCENT Cloud Env* reference model (deployment).



NOTE:

Some applications in Cloud Assessment demo data contain a detailed estimation based on one or more deployment models. Refer to any one of the below for example:

- ASCENT
- CCM Core
- Softsing
- HR System
- Payment Gate
- RMC Backend
- TLS
- Travel Connect Mobile

How cost estimation works

In both estimation types, a Server Class must be specified; for each Server in deployment model (in case of detailed estimation) and for the application component (in case of rough estimation). The specified Server Class is used to find Server Profiles provided by data centers (listed as columns).

In case a data center provides only a single matched server profile (mostly in cases when no Operating System is specified), a single cost value is returned as the estimate for that data center. Else, the lowest cost is returned with 'From' as a prefix.

Server profiles provided by a data center have *Assigned* from relationship with that data center. Optionally, a data center may have a default server profile ('Default Server Profile' relationship). This default server profile is used for estimation in case no Server Class is specified.

Cost per Server (yearly) is calculated from its specialized Server Profile following the formula below:

Server Yearly Cost = [Total Cost of Acquisition / (Expected Lifetime / 12)] + [Cost Per Hour * 24 * 365.25]

NOTE:

If Total Cost of Acquisition and Expected Lifetime are not entered (as in below image), the default values are 0 and 48 respectively.

Also, refer to [Domain Visualization](#), on page 15.

AWS d2.2xlarge linux
Server Profile

Name: * AWS d2.2xlarge linux

Description:

Version: 1.0

Package: Repository > Reference Data > Server Profiles ✕
+ Add

Total Cost of Acquisition:	\$
Per Hour Cost:	\$ 1.656
Expected Lifetime (Months):	
Memory (GB):	61
CPU Cores:	8
Storage Size (GB):	12000
Alias:	

Save Cancel

How to Refresh Pricing Information

Pricing information of Amazon Web Service is available and up-to-date as of the release of Cloud Assessment. To get the latest pricing information follow the steps in *CloudAssessment_HOME/demos/cloud-pricing-import/README* file.

Networking Cost

Networking cost is specific to each data center and built on the monthly network traffic consumed by the application component itself.

A data center calculates the networking cost of any application deployed on it, using a formula defined by the Networking Cost Formula property. This formula is a Javascript function that generates the cost based on the monthly network traffic of the current application component.

The networking cost is then accumulated into the total deployment cost (either based on rough or detailed estimation) of an application component.

Deployment Costs

Estimate Type: Total estimate for all deployments*

Current Data Center: Internal DC
 Current Costs: \$20,668
 Recommended Data Center: Amazon AWS
 Used Servers/Nodes: vmarmqa279_pdo2003intel03.labs.c0a.com

Deployment Alternatives

	Internal DC (Current)	Amazon AWS (Lowest Cost)	MS Azure	My VPC
pdo2003intel03.labs.c0a.com	\$9,434	\$1,289	\$1,686	\$2,782
vmarmqa279	\$9,434	\$1,289	\$1,686	\$2,782
Networking	\$1,800	\$1,200	\$1,200	\$1,800
Total	\$20,668	\$3,778	\$4,572	\$7,364

You need to provide more information about this application component so that we can estimate costs of the deployment at different infrastructure vendors. Please fill in the details below.

Associated Deployments: ASAC Production Deployment

The cost is not available for an undefined or malfunctioning formula (syntactically invalid), or if the network traffic is not available for the application component.

Service Design Publishing

A topology service design in HCM (CSA) is modeled by an Infrastructure Service in Cloud Assessment. This service along with other model elements such as servers, application components, system software etc. can be then published to HCM (CSA) as a real service design.

An infrastructure service can be published in 2 ways: either from a HCM (CSA) reference service design or from a deployment model.

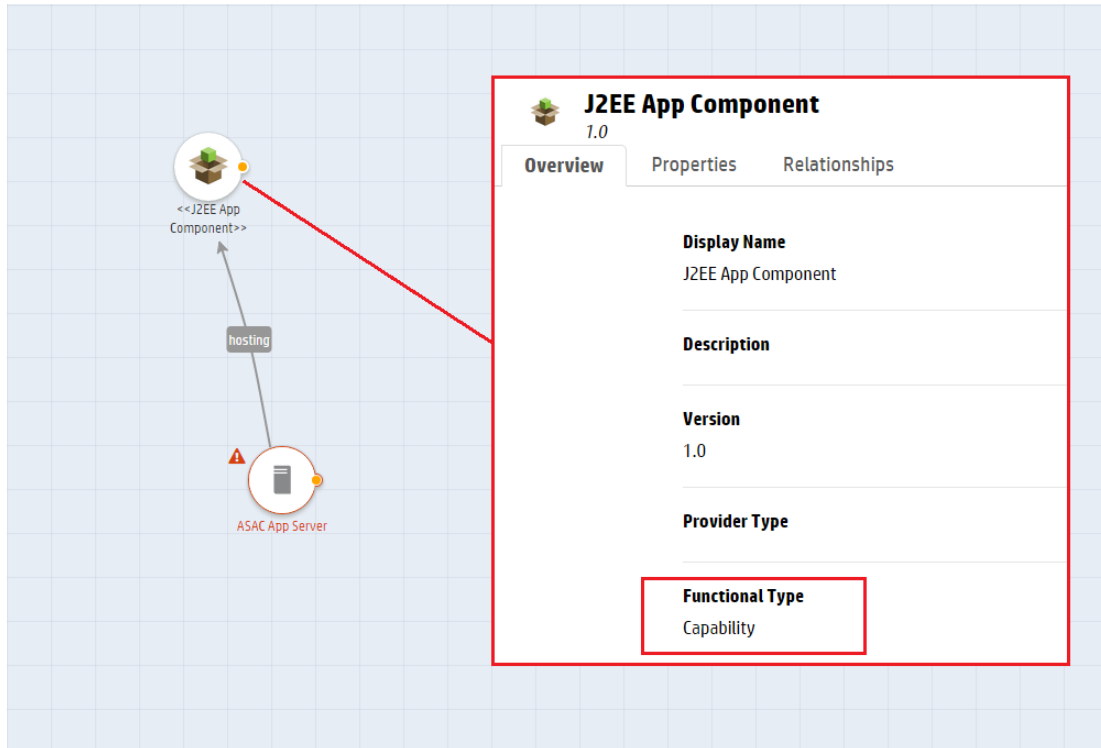
Publishing from a HCM (CSA) Reference Service Design:

This approach requires a service design which is created in HCM (CSA) and then imported into Cloud Assessment as a reference model. The reference model is then used to publish the actual model back into HCM (CSA).

The reference service design must contain a component with functional type of Capability. This component acts as a reference component; a place holder which is then replaced by a more concrete one during publishing.

• **How to Publish**

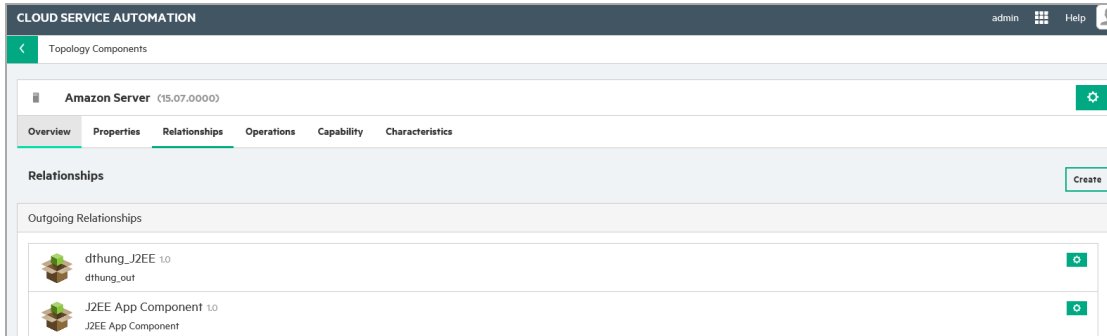
- In HCM (CSA), create a reference service design as below:



- Create a component called ASAC; the functional type for which is Concrete.
- Create another component called J2EE App Component; the functional type for which is Capability.
- Define J2EE App Component as the supported capability of ASAC.

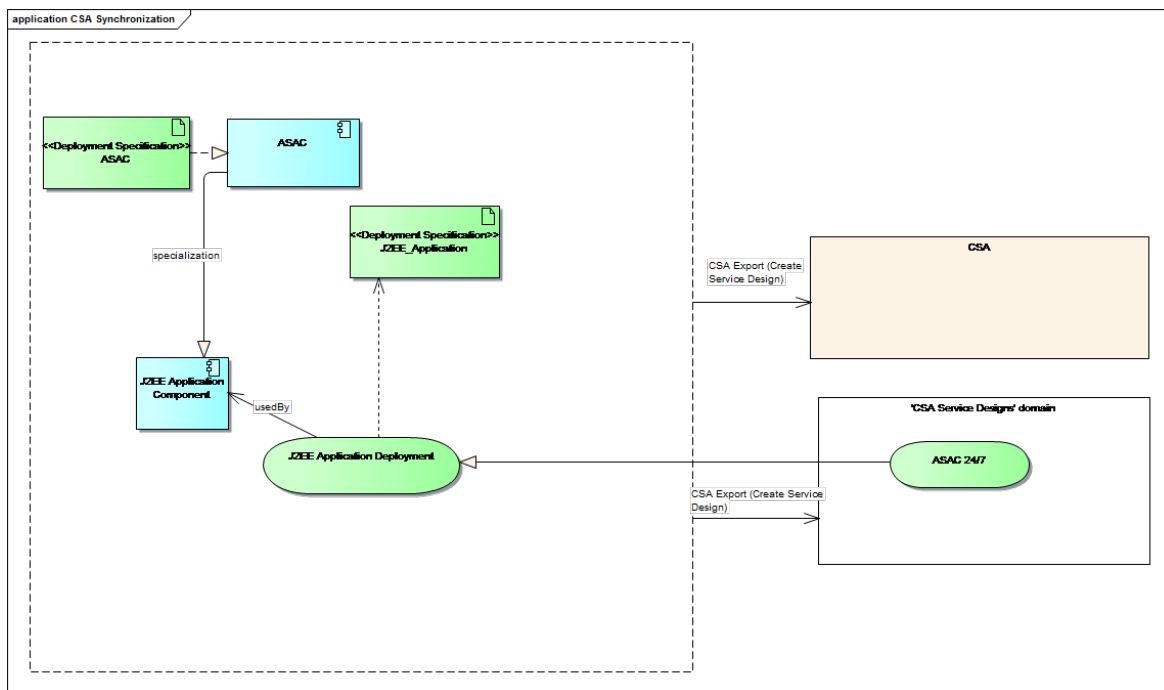
Topology Components	
ASAC (1.0)	
Overview	Properties Relationships Operations Capability Characteristics
Capability	
J2EE App Component (1.0)	
Property Mappings	
Capability Property	Component Property

- Define **outgoing** relationships from other components. For example: servers to J2EE Application Component. These relationships are inherited by ASAC by default.



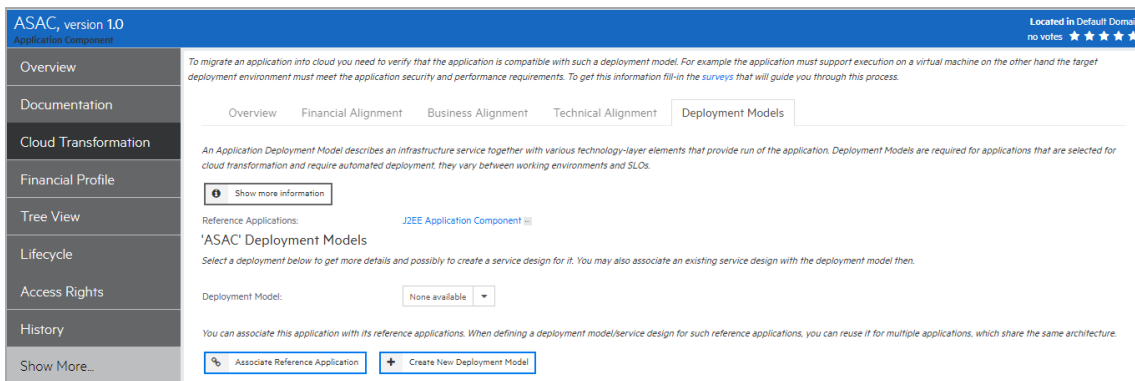
- Create the service design with J2EE App Component and other relevant components such as servers.

In Cloud Assessment, with regard to below example model prepare as per steps given ahead:

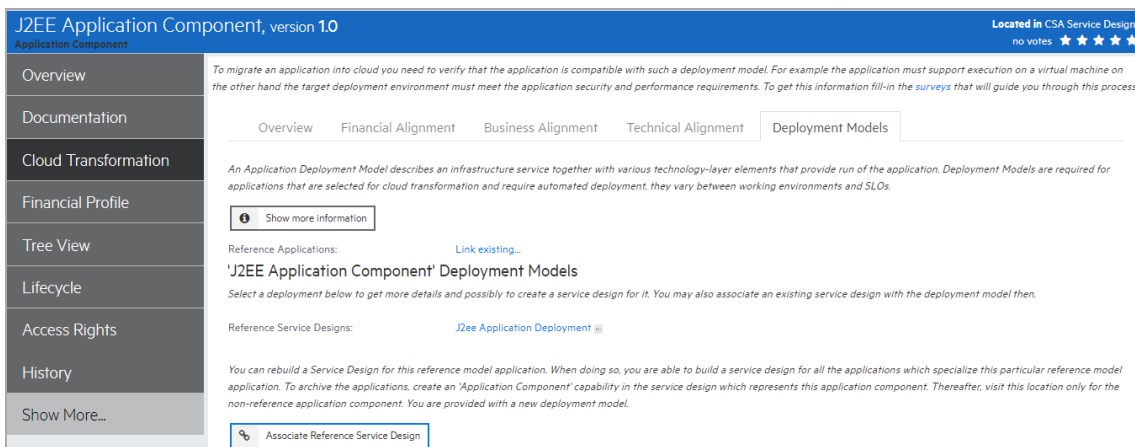


- Create an application component: ASAC.
- Create a reference application component (application in a Reference Model domain): J2EE Application Component.
- Import the components and service designs from HCM (CSA) (For details see, "Importing Data from Integration Server" in *Administration Guide*).
- Run the **Deployment Specification Association Update** Task to link the imported deployment specification (representing components in HCM (CSA)) to the existing application components - system software. This is required to publish application components and system software into HCM (CSA).

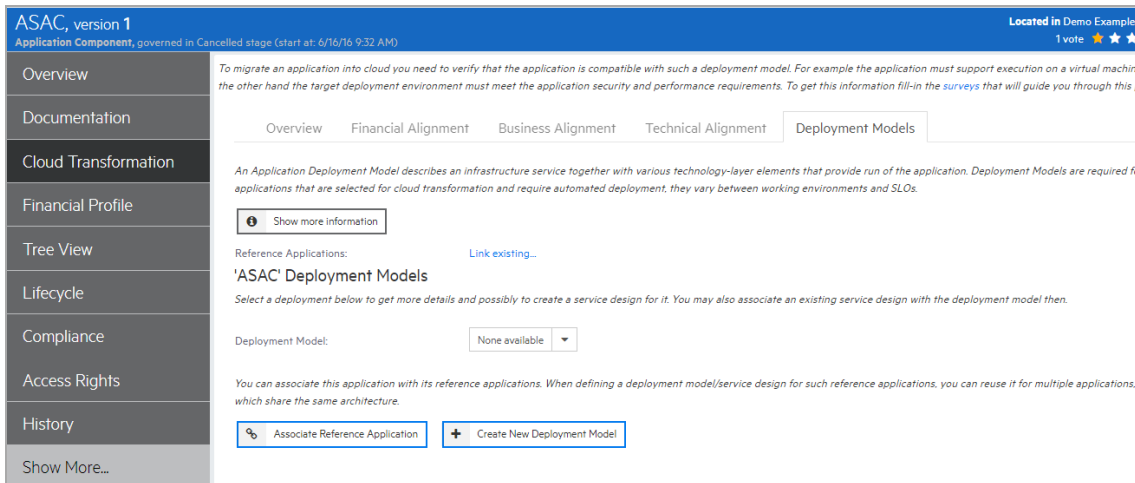
- Make J2EE Application Component a reference application of ASAC.



- Link J2EE Application Component to the imported infrastructure service (reference service design).

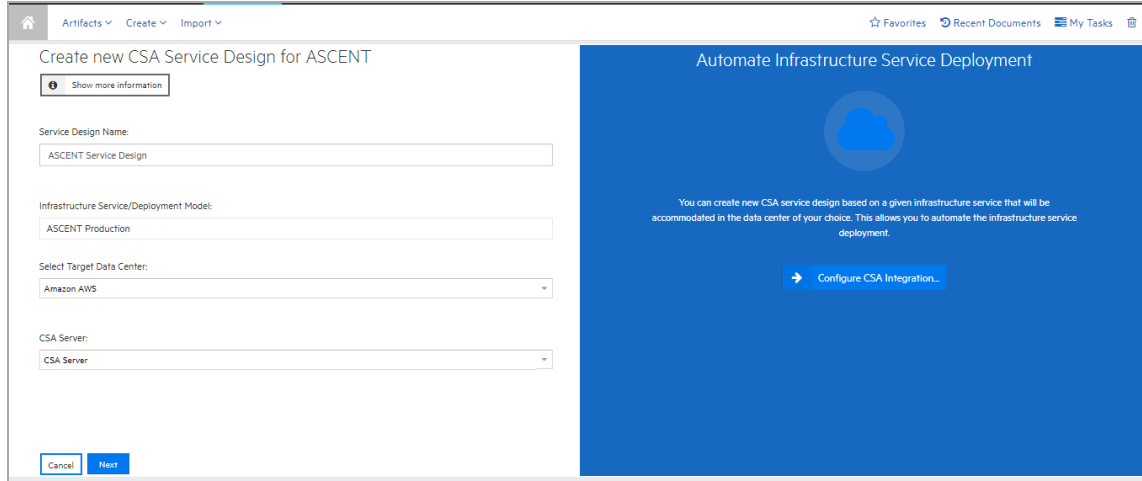


- Ensure that infrastructure service is linked to a deployment specification which contains JSON data of the reference service design.
- Go to **Cloud Transformation > Deployment Models** tab of ASAC application component. Select the deployment model to be published from the drop-down list, review its mapping to HCM (CSA) topology components and click **Create new Service Design** button.

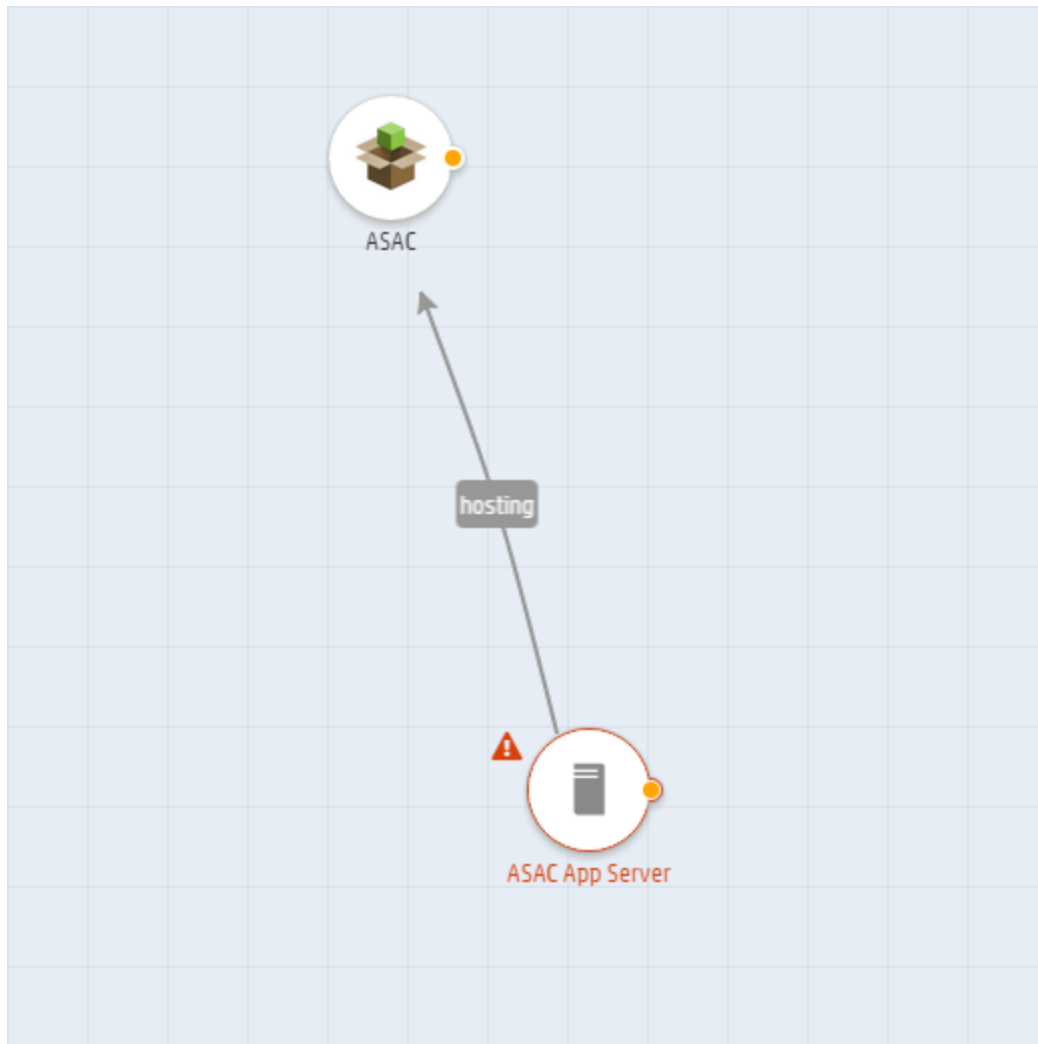


- Provide the service design name and a HCM (CSA) integration server for publishing and then click

Publish.



- The published service design looks as in the below image:



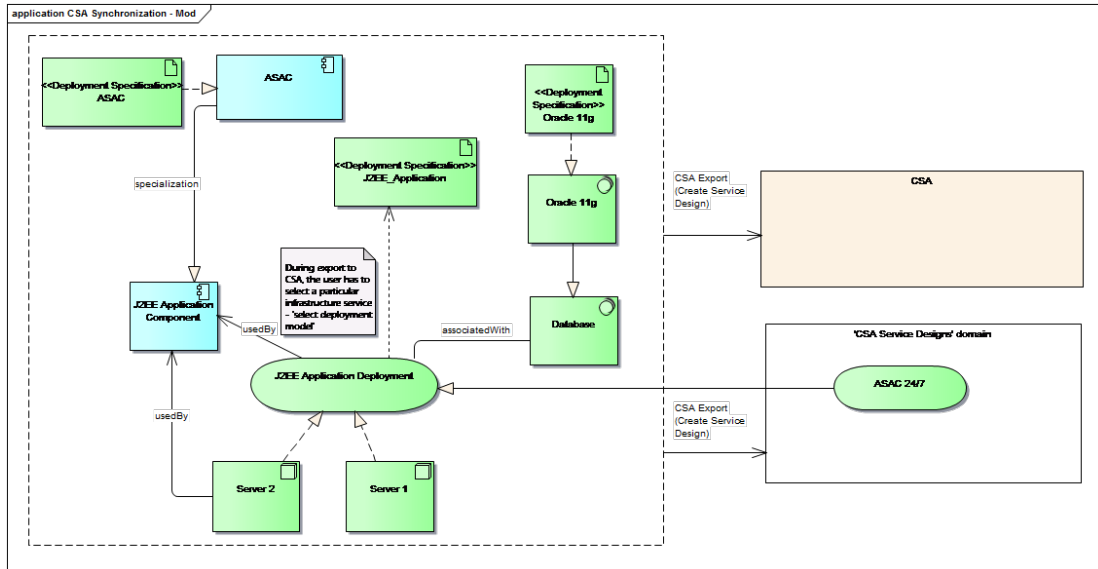
Publishing from a Deployment Model:

This type of publishing relies upon the artifacts (model elements) associated with an infrastructure service. Together, they form a complete deployment model to be published into HCM (CSA).

- **Supported Models:**

- **Archimate Compliant Model**

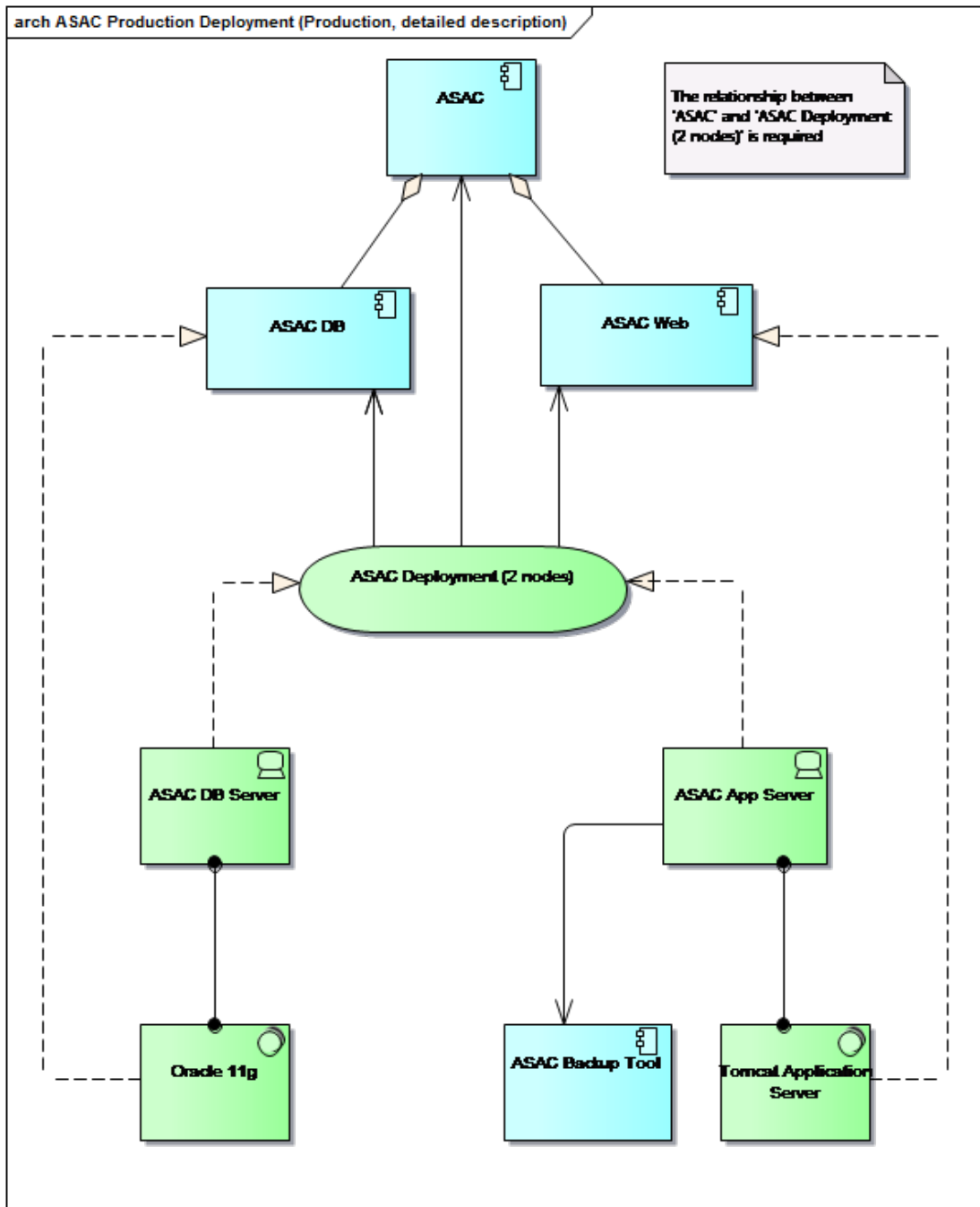
This model demonstrates a simple deployment model compliant with Archimate. It just provides an overview of the model without any details of which server the application is deployed on.



- **In-Depth Model**

In addition to the Archimate compliant model, Cloud Assessment also supports a model with a higher level of granularity which provides further details on how the application components are

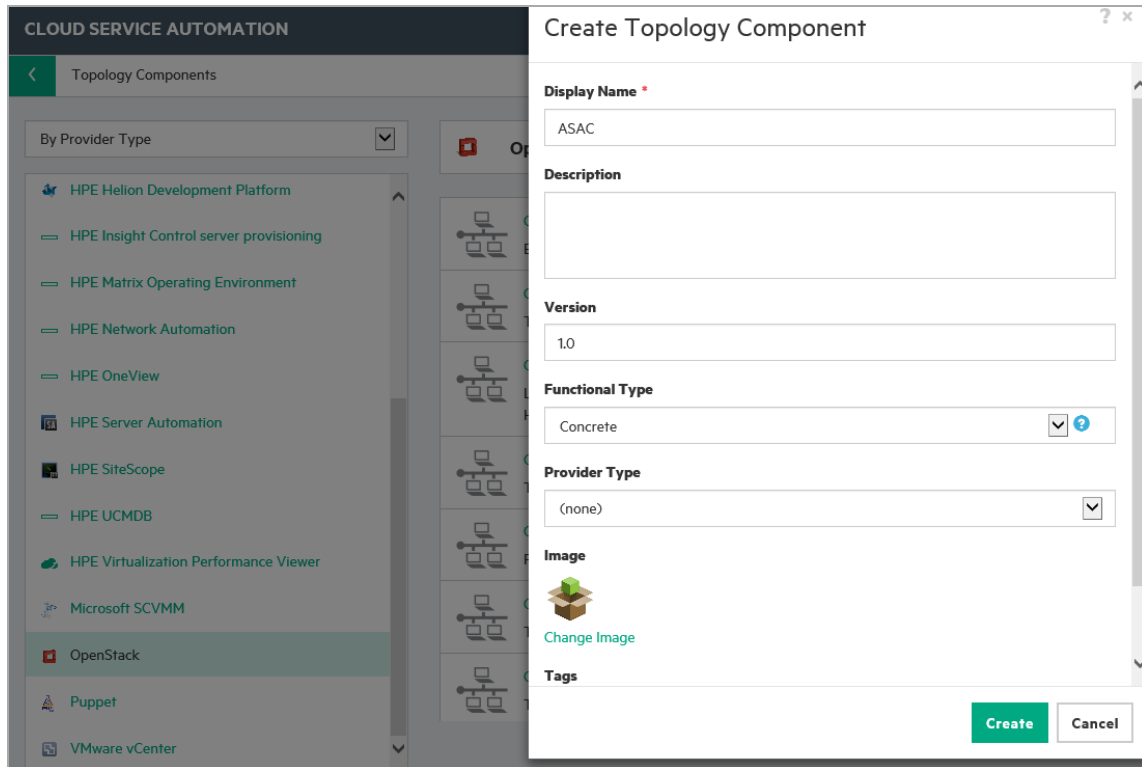
deployed onto servers or decomposed into sub-components.



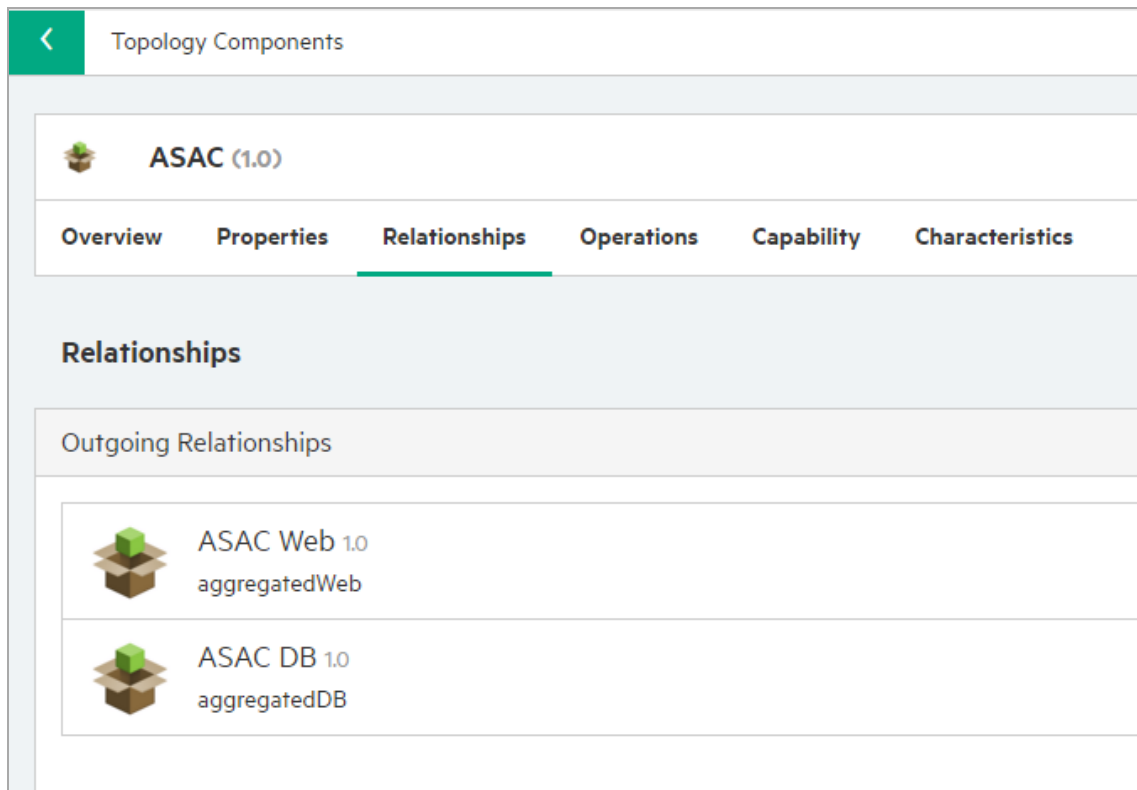
How to Publish

In HCM (CSA)

- Create relevant components with the same names, which represent the application components, system software to be published to HCM (CSA). For example: ASAC, Oracle 11g, etc. It is not required to create a component for an application component or system software which is *specialized* by another one as these are not published into HCM (CSA) at all.

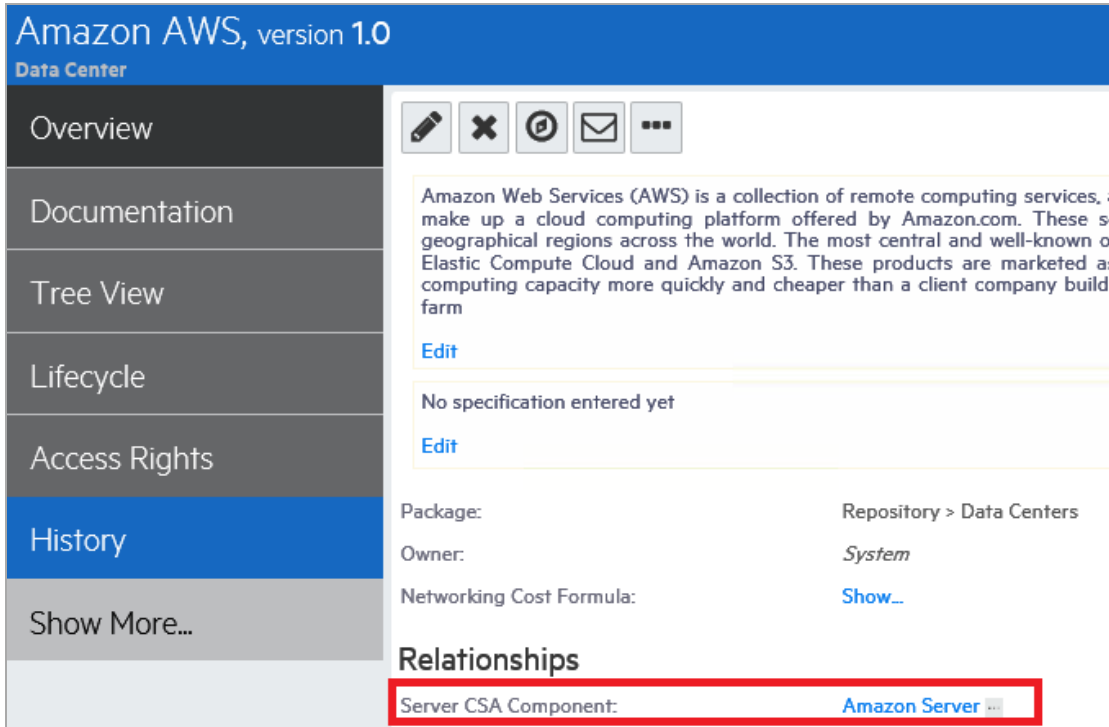


- Define the **outgoing** relationships amongst the components created, based on how they are visualized in the models. However, the relationship names can be defined arbitrarily as they do not rely upon Cloud Assessment relationship names. These relationships, if defined correctly, are used to visualize how components are connected in the service design.



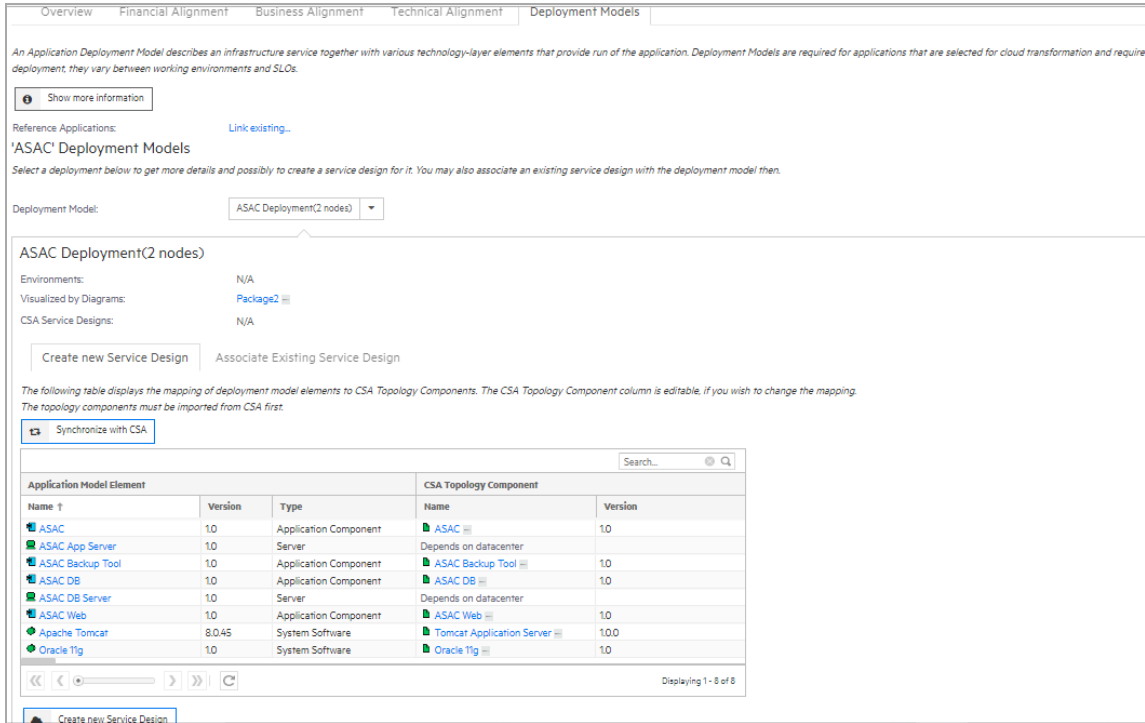
In Cloud Assessment

- Prepare a model as illustrated above (it is recommended that the model is developed by a modeling tool such as Sparx EA), with the following prerequisites/practices:
 - The infrastructure service can be used by one or more application components.
 - An application component can use multiple infrastructure services. User must select which one is required for publishing.
 - Application components and system software might be *specialized* by other components and system software. These components and system software are not published, since they are regarded as reference artifacts in the model.
 - Application components and system software (which are not specialized by others) must be *realized* by deployment specifications imported from HCM (CSA) (For details see, "Importing Data from Integration Server" in *Administration Guide*). These deployment specifications contain the HCM (CSA) component information which is required to publish an application component and system software to a HCM (CSA) service design.
 - The data center is required to create the components which represent servers in a HCM (CSA) service design. Use the "Server HCM (CSA) Component" relationship on the Data Center view page to specify which server component is to be used for publishing. The components must be imported from HCM (CSA) first.

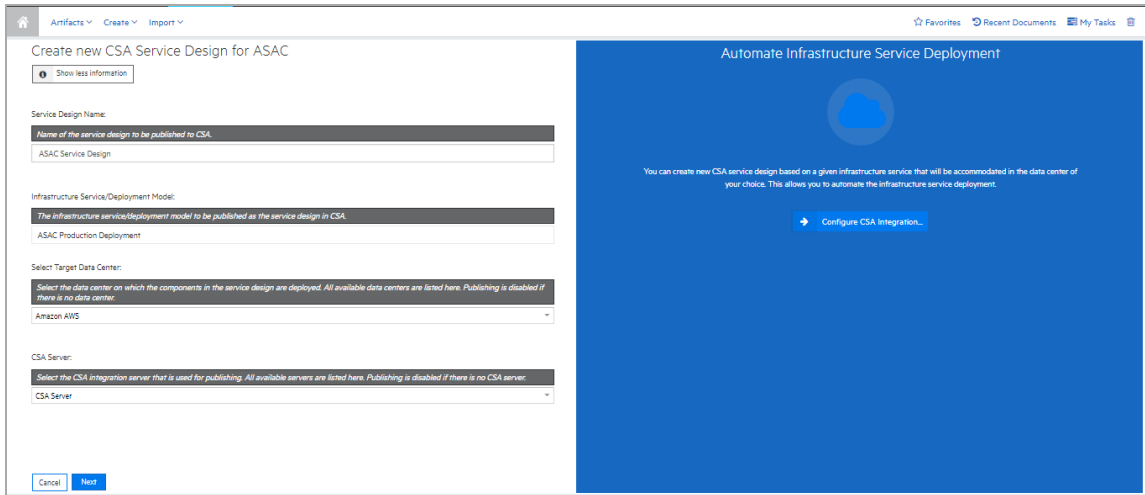


If this relationship does not exist, the server component is retrieved from the default configuration (CSATopologyDesignTemplate.ftl script). Current supported data centers are: "Amazon AWS" and "VMware vCenter". The data center artifacts must be named accordingly.

- Open an application component in the model which is not *specialized* by any other. For example: ASAC application component.
- Go to **Cloud Transformation > Deployment Models** tab, select the deployment model to be published from the drop-down list, review its mapping to HCM (CSA) topology components and click **Create new Service Design** button.



- Provide further inputs for publishing, as in the below image. Click **Show more information** button to display the help texts.



- Publishing is disabled if no data centers or HCM (CSA) integration servers are available in Cloud Assessment.
- The second step of the wizard provides a summary of the service design to be created in HCM (CSA).

Summary of new Service Design for ASAC

Show more information

Service Design Name:
ASAC Service Design

Involved Application Components:
ASAC

Associated System Software:


Servers Used in the Design:

Select Target Data Center:
Amazon AWS

CSA Server:
CSA Server

Previous Publish

Automate Infrastructure Service Deployment



You can create new CSA service design based on a given infrastructure service that will be accommodated in the data center of your choice. This allows you to automate the infrastructure service deployment.

NOTE:

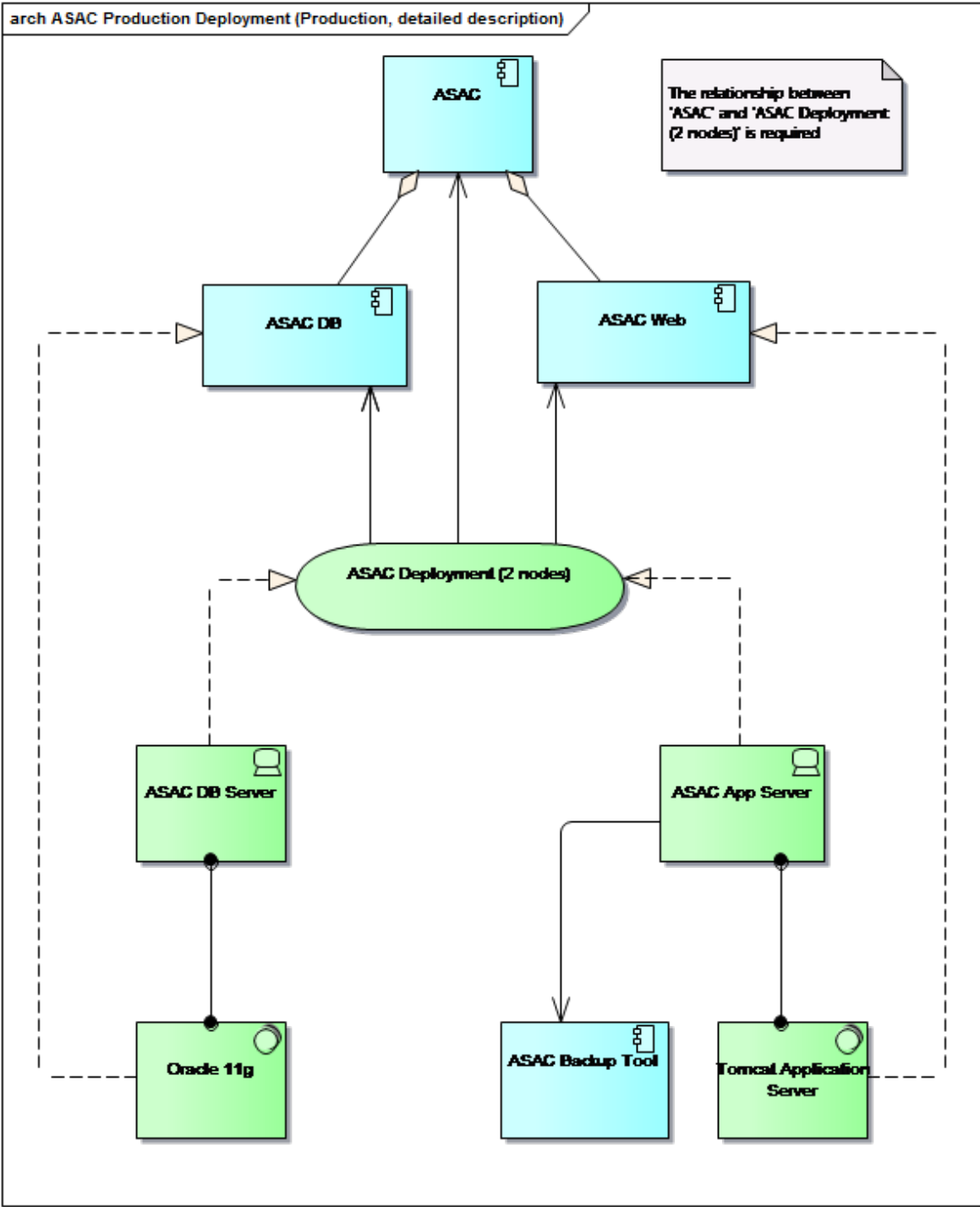
The current user publishing the infrastructure service must have the "Read" access rights for all artifacts involved in the model. Else, either the publishing is disabled or the published service design is incomplete.

If the model elements are not mapped to relevant topology components, then these components (along with their relationships) get created on HCM (CSA) during publishing. The elements are also mapped to the created components.

Publishing Example Diagrams

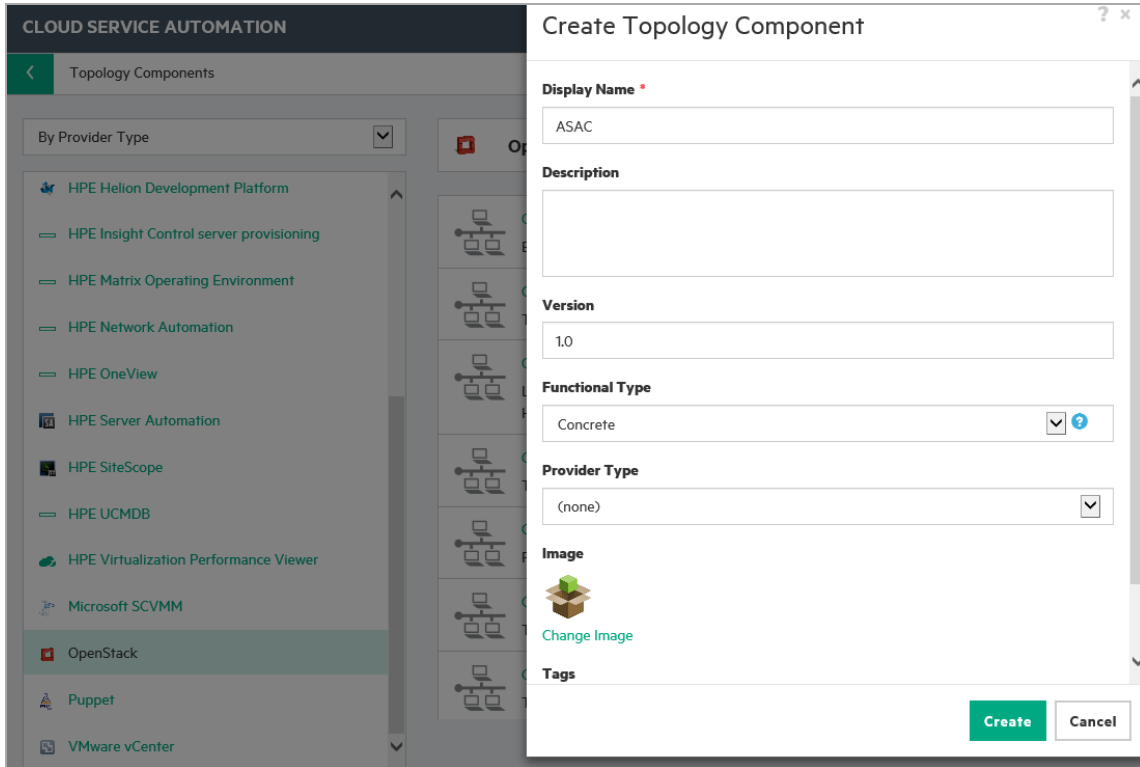
Cloud Assessment provides some example service designs which are modeled by the diagrams in Sparx EA. Examples of these diagrams can be found in [Cloud Assessment installation folder] \demos\service-design-publishing\publish-csa-sample.eap.

This topic provides step-by-step instructions on how to publish one of these supported design models to HCM (CSA) as a service design.

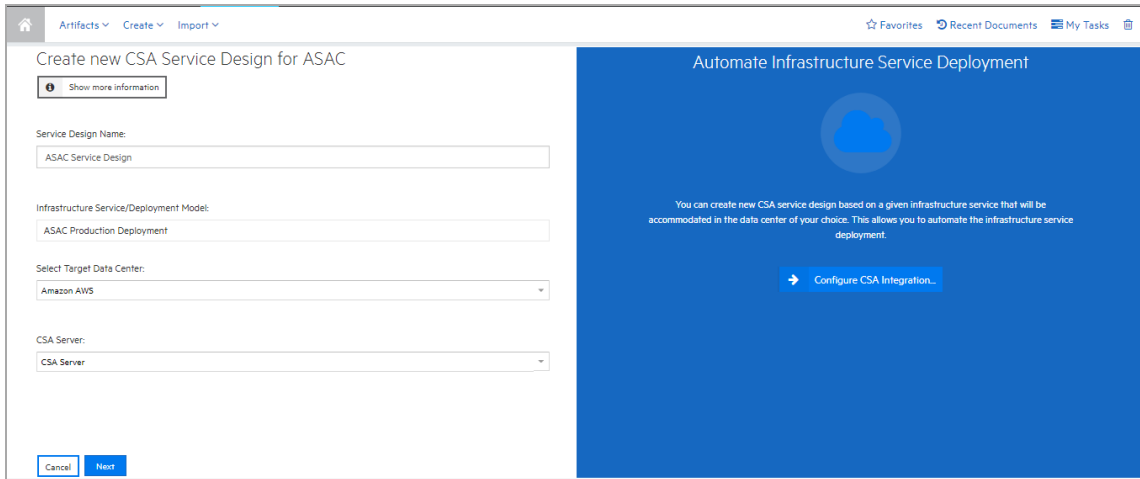


In HCM (CSA):

- Create relevant components which represent the application components and system software to be published to HCM (CSA). For example: ASAC, ASAC DB, ASAC Web, Oracle 11g, ASAC Backup Tool and Tomcat Application Server.



- Cloud Assessment supports default server components in HCM (CSA) such as Amazon Server, vCenter Server and OpenStack Server. These servers are used for publishing depending on the data center chosen as highlighted in the image below. Hence, it is not required to create components for ASAC DB Server and ASAC App Server, unless you wish to use your own-defined servers.

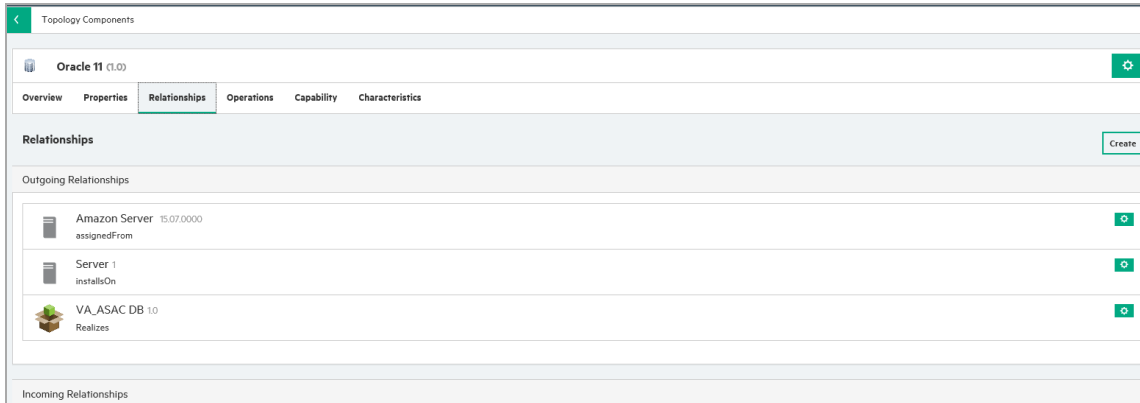


NOTE:

Currently, OpenStack Server is being used for Micro Focus Helion.

- Define the relevant relationships between HCM (CSA) components to visualize how application components, system software and servers are related to each other. That is to create:
 - Outgoing relationship from ASAC to ASAC DB and ASAC Web
 - Outgoing relationships from Oracle 11g to ASAC DB and ASAC DB Server

- Outgoing relationships from Tomcat Application Server to ASAC Web and ASAC App Server
- Outgoing relationship from ASAC App Server to ASAC Backup Tool

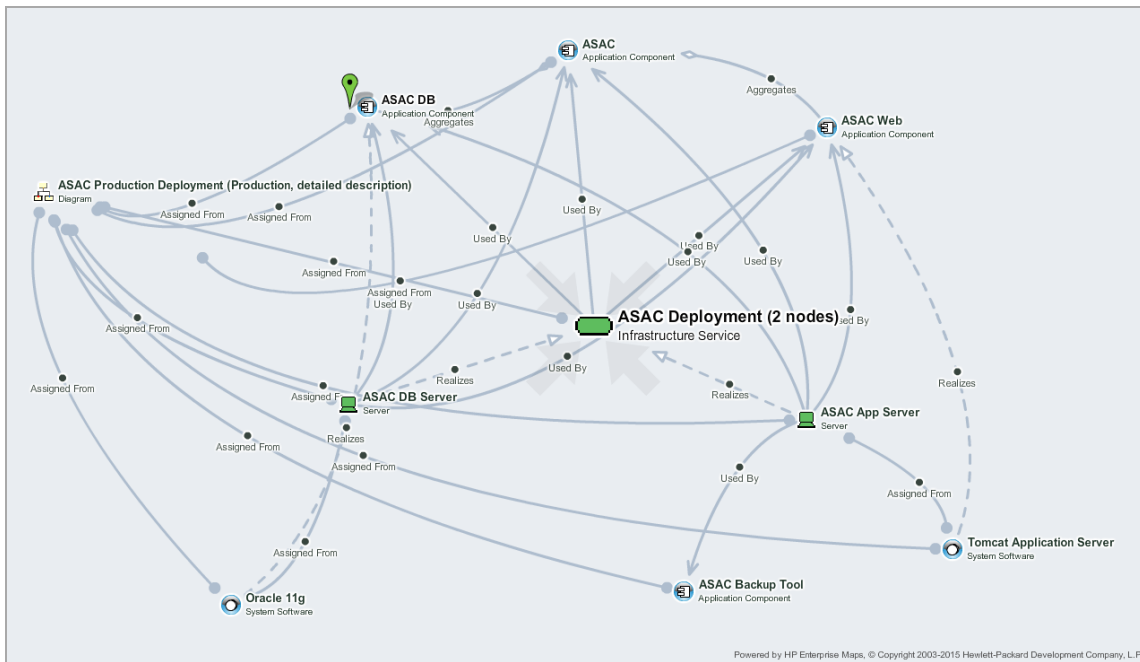


In Sparx EA

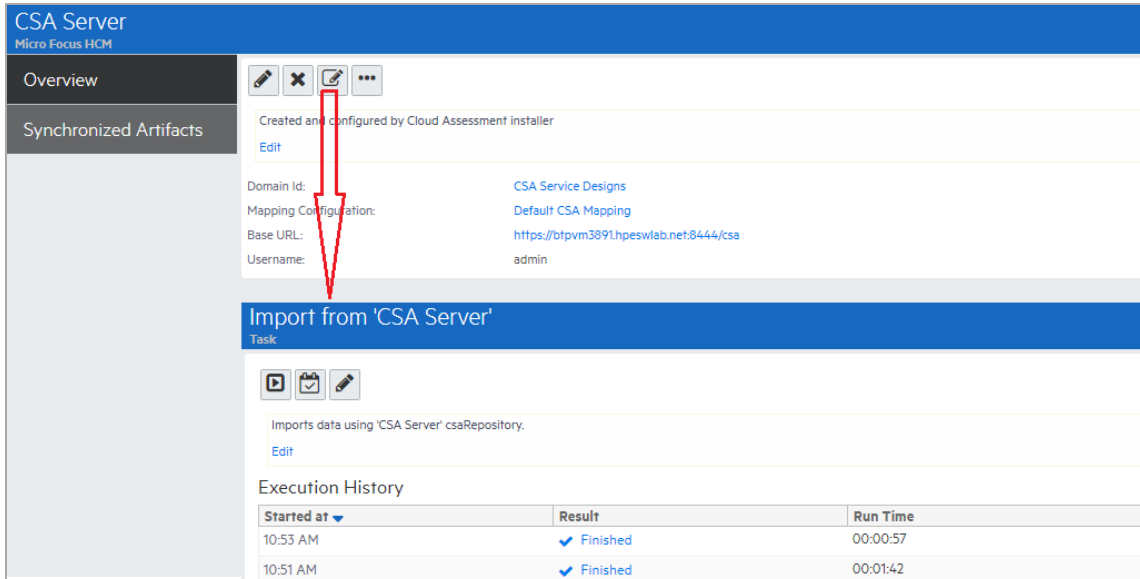
- Open the ASAC Production Deployment (production, detailed description) diagram in the project
- Sync to Cloud Assessment

In Cloud Assessment

- Verify that artifacts and their relationships are created accordingly. To do so, open the diagram that was synced to Cloud Assessment or open one of the artifacts in the Navigator as illustrated below:



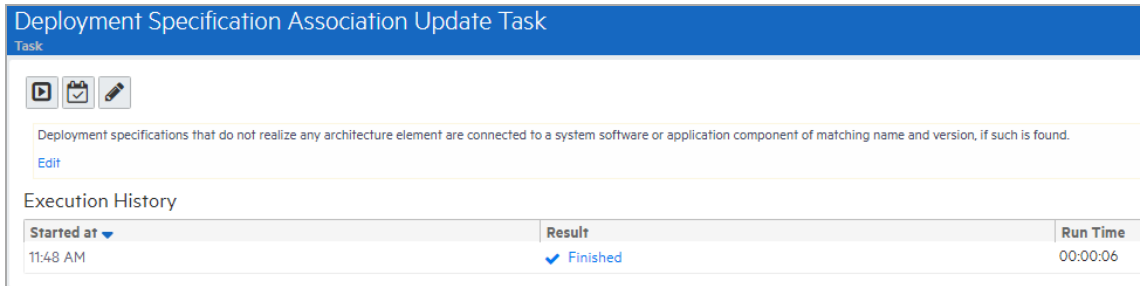
- Create a HCM (CSA) repository and then execute the associated sync task to import the components from HCM (CSA).



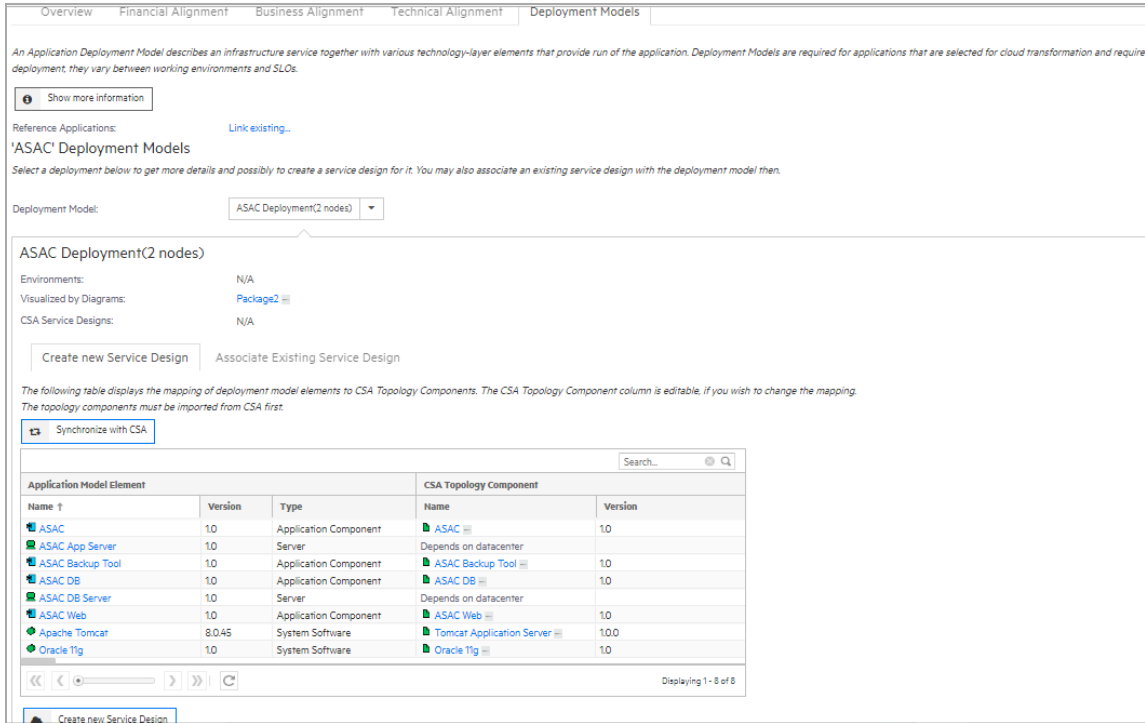
NOTE:

Components are imported to Cloud Assessment as Deployment Specification artifacts.

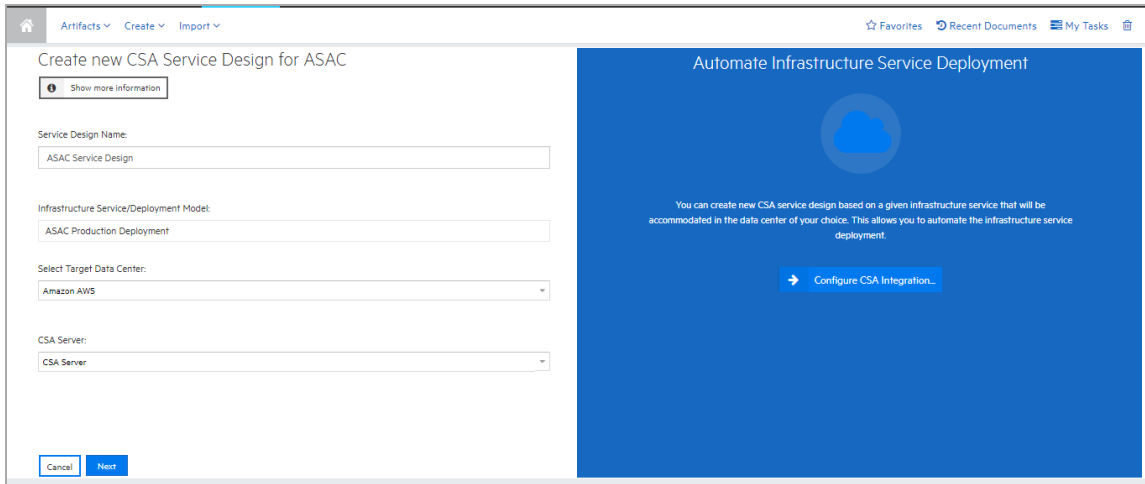
- Run the **Deployment Specification Association Update Task** to associate the application components and system software to the ones imported from HCM (CSA).



- Go to **Cloud Transformation > Deployment Models** tab of ASAC, select the deployment model to be published from the drop-down list, review its mapping to HCM (CSA) topology components and click **Create new Service Design** button.



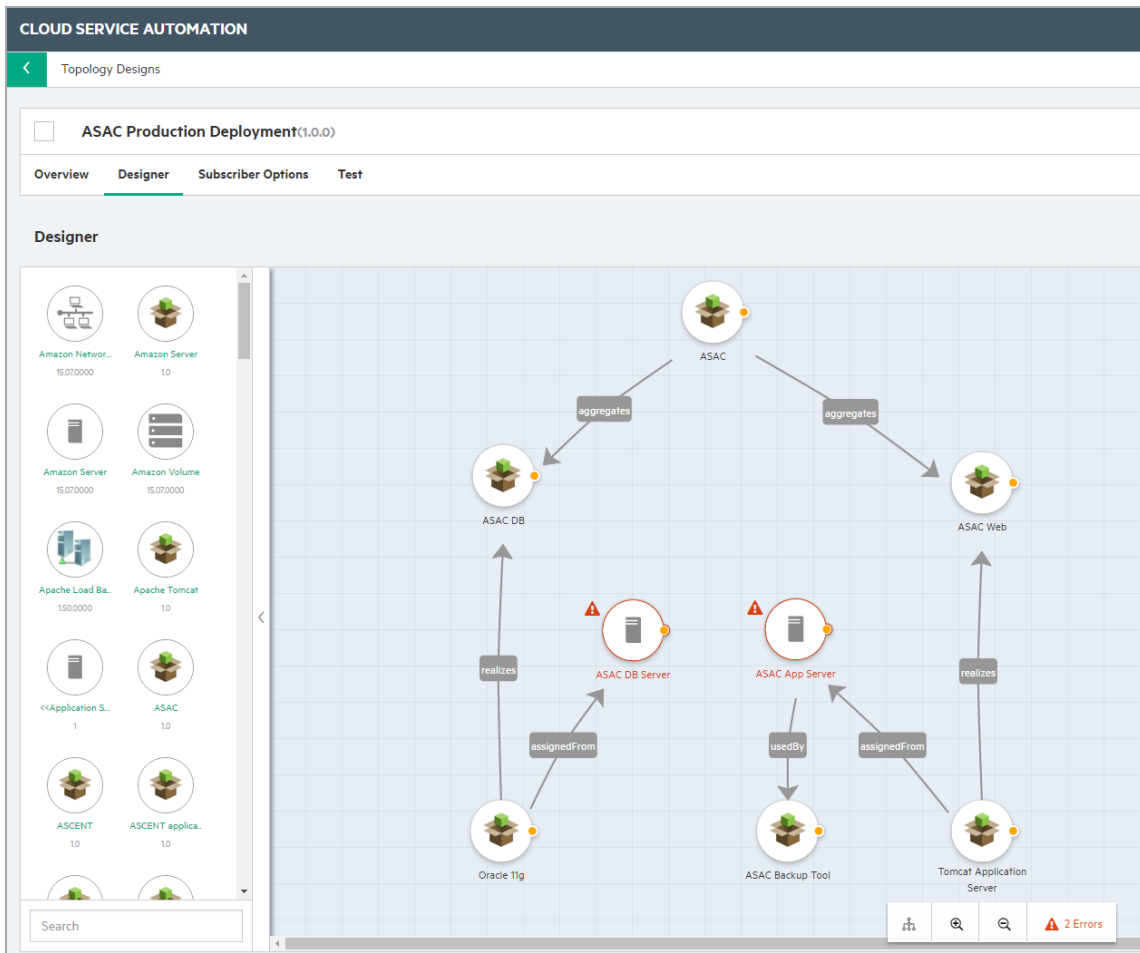
- Provide more information such as service design name, target data center which decides what server component is used to create the server components, etc. in the first step of the publishing wizard.



- Thereafter, in the summary step, verify the data to be published to HCM (CSA).



- Once the publishing is finished successfully, you can check the service design created in HCM (CSA).



NOTE:
The relationship names and component icons are defined arbitrarily by HCM (CSA) users. Therefore, the published service design could look slightly different from the one above.

Chapter 7: Surveys

This section covers the following topics :

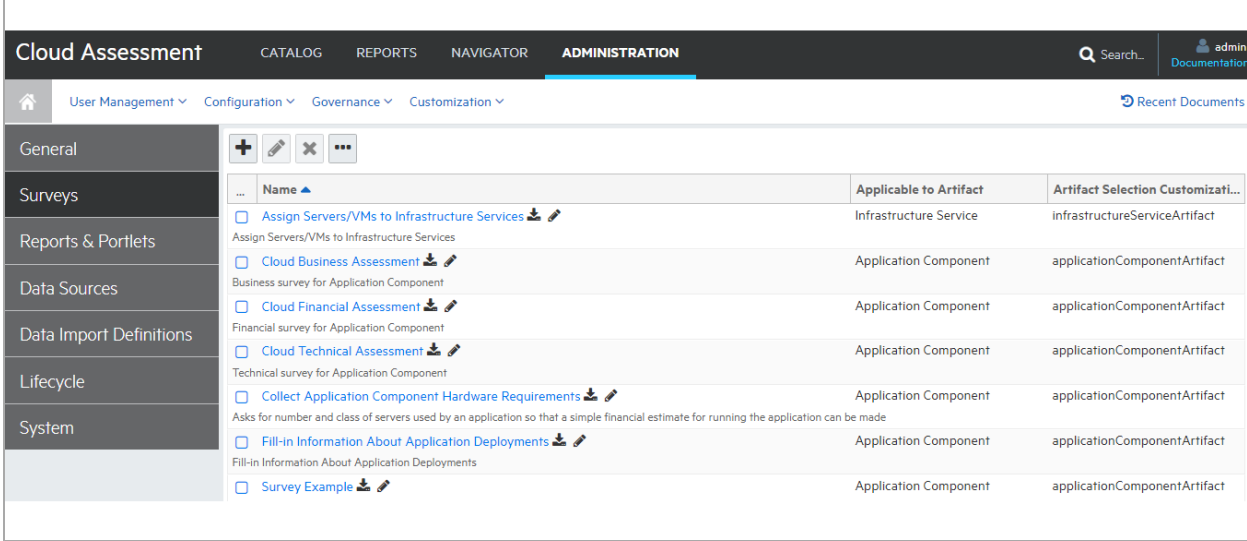
- [Understanding Survey Definition, below](#)
- [Starting New Survey, on the next page](#)
- [Undertaking the Survey, on page 96](#)
- [Keeping Track of Survey, on page 98](#)
- [Reviewing Answers, on page 99](#)
- [Taking a Self-Assessment Survey, on page 100](#)
- [Monitoring and Managing Survey, on page 102](#)

Understanding Survey Definition

A Survey Definition In Cloud Assessment consists of the questions in a survey . This Survey Definition artifact contains out-of-the-box survey definitions designed to help assess the possibility of migrating Application Components into Cloud.

- **Cloud Business Assessment**
Survey for assessing the possibility of cloud migration from business perspective.
- **Cloud Technical Assessment**
Survey for assessing the possibility of cloud migration from technical perspective.

NOTE:
Only Administrator role can create or edit survey definitions. Survey Definitions can be accessed both from **Survey Definition** in Catalog UI and **Manage Scripts** in Administration UI.



Starting New Survey

Once a survey is defined (i.e. Survey Definition artifact is created and previewed), a Survey Manager or Administrator can invite the owner or contacts of the artifacts to fill out the survey (Survey artifact).

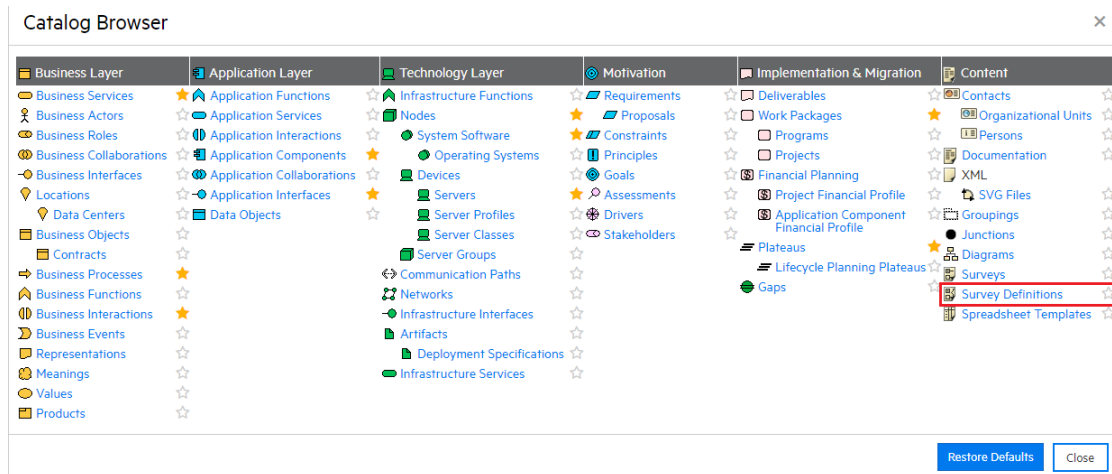
A survey comprises of a list of artifacts, respondents and their responses.

NOTE:

Only Survey Manager or Administrator can start a survey.

To start a survey, login as a user with Survey Manager role/credentials and follow the steps below:

1. Open Catalog Browser and click **Survey Definitions** under Content tab.



2. Select a survey definition to start the survey.
 - a. If you are the Administrator, you may click **Edit** to change the following fields in the survey definition:
 - a. Applicable to Artifacts: artifact types this survey applies to.
 - b. Target Contact Roles: contacts under the survey artifacts who will be invited to take the survey. By default, all contacts of the survey artifacts are invited.

NOTE:

Survey Manager is not allowed to access **Edit** function.

3. Click **Start Survey** and fill in the required information to begin with survey.

Cloud Assessment < CATALOG REPORTS NAVIGATOR > Search... Create new in Default Domain admin Documentation

Artifacts > Create > Import > Favorites Recent Documents My Tasks

Assign Servers/VMs to Infrastructure Services Survey Definition Located in Top-level Domain no votes ★★★★★

Overview Start Survey Edit

Preview Assign Servers/VMs to Infrastructure Services

Assessment Portfolio Show more information

Access Rights

Applicable to Artifacts: Infrastructure Service

Target Contact Roles: Administrator, Business Owner, Developer, Operations Manager, Project Manager, Provider, Subject Matter Expert / Architect, Technical Owner

Survey Designer: System

Executed/Running Surveys

You can manage individual ongoing surveys. Surveys answered by all the respondents or marked complete are displayed in green and surveys that are incomplete are displayed in yellow or red depending on whether they have reached the timeline.

Right now you see all survey instances. Show only surveys started using the 'Start Survey' wizard.

Mark Completed Cancel Survey Search...

Name ↑	Date Started	Expected Completion Date	Progress	Status
No data to display				

Start survey 'Cloud Technical Assessment'

You must enter some basic information and select the artifacts you wish the survey to be processed for. List of respondents is calculated and can be optionally notified over email. Click 'Preview' on the right to review the survey questions

Show more information

Name of the survey:

Expected Completion date: 12/15/2017

Message for the respondents:

Send Email Notifications

Owner as respondent if no other contacts available

Cancel Next

Cloud Technical Assessment

Preview

Technical survey for Application Component

This survey has been requested by [admin](#)

Please fill in this survey by the end of December 15, 2017

[Learn More...](#)

4. Enter the name and click **Next**. Select the artifacts to be included in this survey.

Start survey 'Cloud Technical Assessment'

Select the artifacts you want to be surveyed. You can see all the artifacts that have not been surveyed yet. You can switch the table to display all and further filter the list. If you are missing some artifacts, import them from external sources.

All that have not been surveyed yet Filter

<input checked="" type="checkbox"/>	Name ▲	Version	Alias	Transformation St...	Domain	Rating	Package	Lifecycle Stage	Artifact Type
<input checked="" type="checkbox"/>	☆ ASCENT DB	1.0		Transform	Demo Example Do...	☆☆☆☆☆		Candidate	Database Schema
<input checked="" type="checkbox"/>	☆ ASCENT Web	1.0		Transform	Demo Example Do...	☆☆☆☆☆		Candidate	J2EE Application
<input checked="" type="checkbox"/>	☆ Analyst Research	0.2		Analyze	Demo Example Do...	★☆☆☆☆		Candidate	Application Compo...
<input checked="" type="checkbox"/>	☆ Biola	1		Ignored	Demo Example Do...	☆☆☆☆☆		Candidate	Application Compo...
<input checked="" type="checkbox"/>	☆ Brand Management	6.2		Postpone	Demo Example Do...	★☆☆☆☆		Candidate	Application Compo...
<input checked="" type="checkbox"/>	☆ BrandMart	9.1		Automated	Demo Example Do...	★★★★☆		Candidate	Application Compo...

Acronym: ARPurpose: Sed commodo orci et felis consequat at euismod erat tempor.

Acronym: SMARTSPurpose: Duis in nunc sem, vitae faucibus velit.

Acronym: BMAlias: BrandPurpose: Ut eget nisl in nisl imperdiet lobortis nec sit amet nulla.

Acronym: BMAlias: BrandsPurpose: In vehicula est mauris, ac scelerisque eros.

NOTE:
The filter **All that haven't been surveyed yet** is selected by default. You can select **All** to view artifacts that have been surveyed earlier.

5. Verify the counts of artifacts and respondents and if they are as expected. You can do the following if required:

- Remove unwanted artifacts from the survey
- Add or remove respondents

Click the **Finish** button visible at the bottom of the list.

Start survey 'Cloud Financial Assessment'

You are about to start a survey 'Cloud Financial Assessment' that:

Surveys information about **3 artifact(s)**
Affects **8 people**
Each survey wizard contains **11 questions**
Email notifications to fill in the survey are sent out right after you click 'Finish'.

Surveyed Artifacts

You can see the list of artifacts to be surveyed below. You can also review the respondents, generated based on artifact contacts and ownership.

<input type="checkbox"/> Name ↑	Version	Respondents
<input type="checkbox"/> ASAC	1	Nicole Smith, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Dave Olson, Mary River
<input type="checkbox"/> ASCENT	1	Nicole Smith, Jack Foster, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Mary River
<input type="checkbox"/> ASCENT DB	1.0	Nicole Smith, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Dave Olson, Mary River

Navigation: Previous, Finish

Displaying 1 - 3 of 3

Undertaking the Survey

You can respond to the survey in the following 2 ways:

- **Via Notification Email:** respond to an invite for survey through email by Survey Manager as given below:

1. Open your Inbox and look out for an email with the subject title “Survey Invitation: ...” sent by Cloud Assessment.

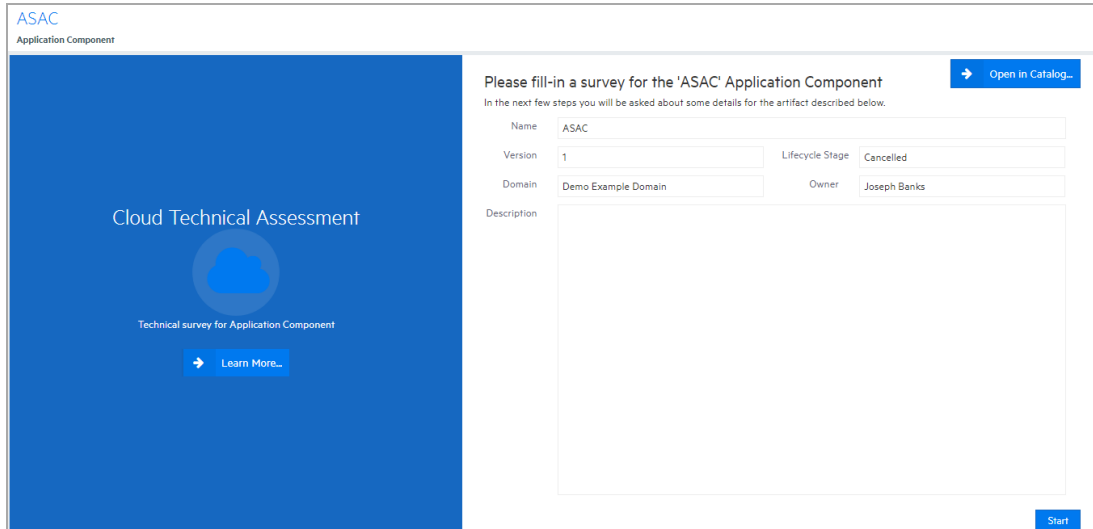
Survey Invitation: Collect Application Component Hardware Requirements

Survey

Click the following link(s) to start the survey:

Name	Description
AppComponent_DT1	
Please respond by the end of: Jul 4, 2016 12:00:00 AM ICT	
Started by: Administrator at Jul 4, 2016 4:15:42 PM ICT	

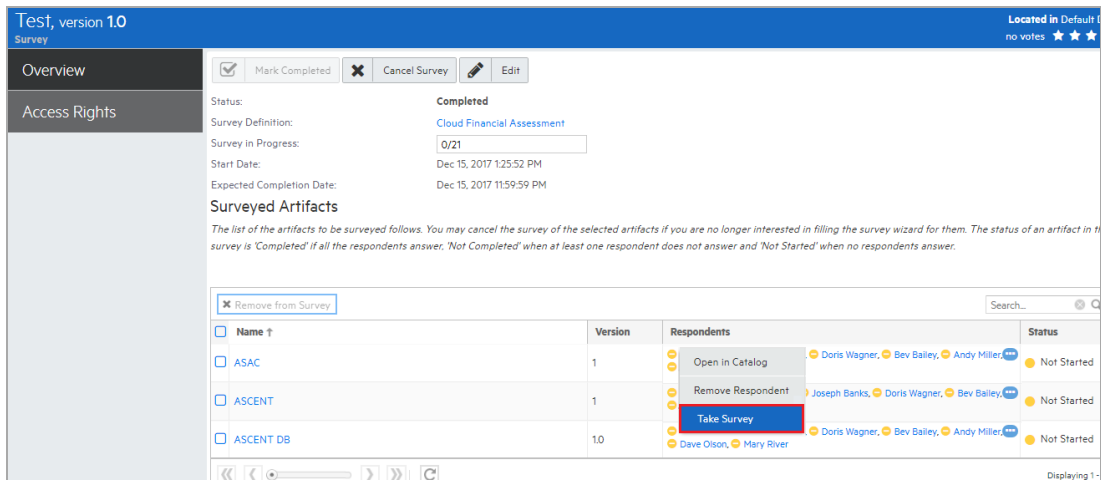
2. Open the link corresponding to the artifact name (for example : Agresso). The survey opens in a new window. You need to login to Cloud Assessment in order to fill in the survey.



NOTE:

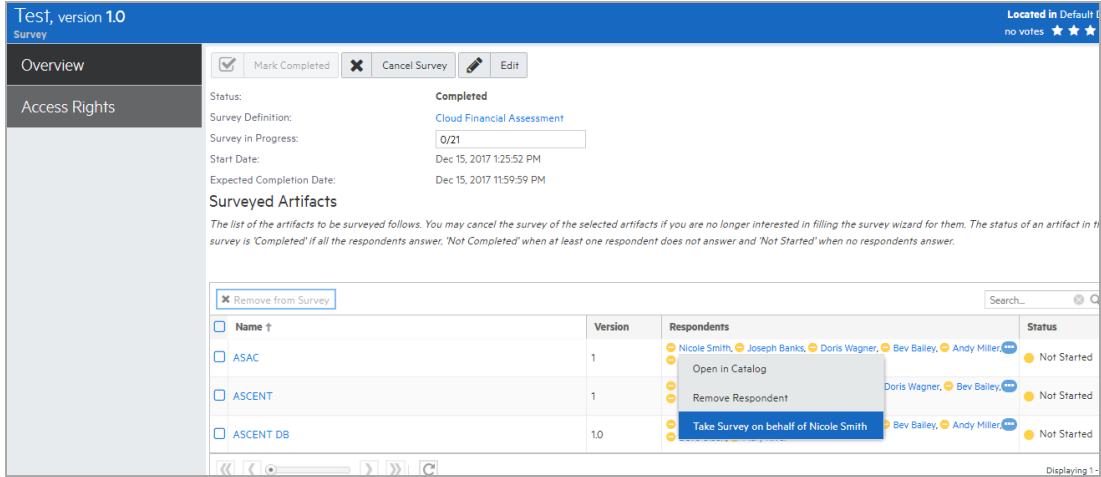
Your account must at least have the READ permission for the survey artifact, else you will just see an error message in the open window. If this happens contact your administrator.

3. Answer the survey questions, then click **Finish** to complete the survey for that artifact.
 4. Repeat steps 1-3 to complete survey for other artifacts.
- **Via a Survey Instance:** respond to a survey directly on Cloud Assessment UI as given below:
 1. Open the survey artifact you wish to undertake. Look for the surveyed artifacts you would like to respond to. Click your name in the respondents list to start filling out the survey.



2. A Survey Manager or a user with 'write' permission for the current survey can also undertake the survey on behalf of other respondents. Simply, click the particular respondent's name and select

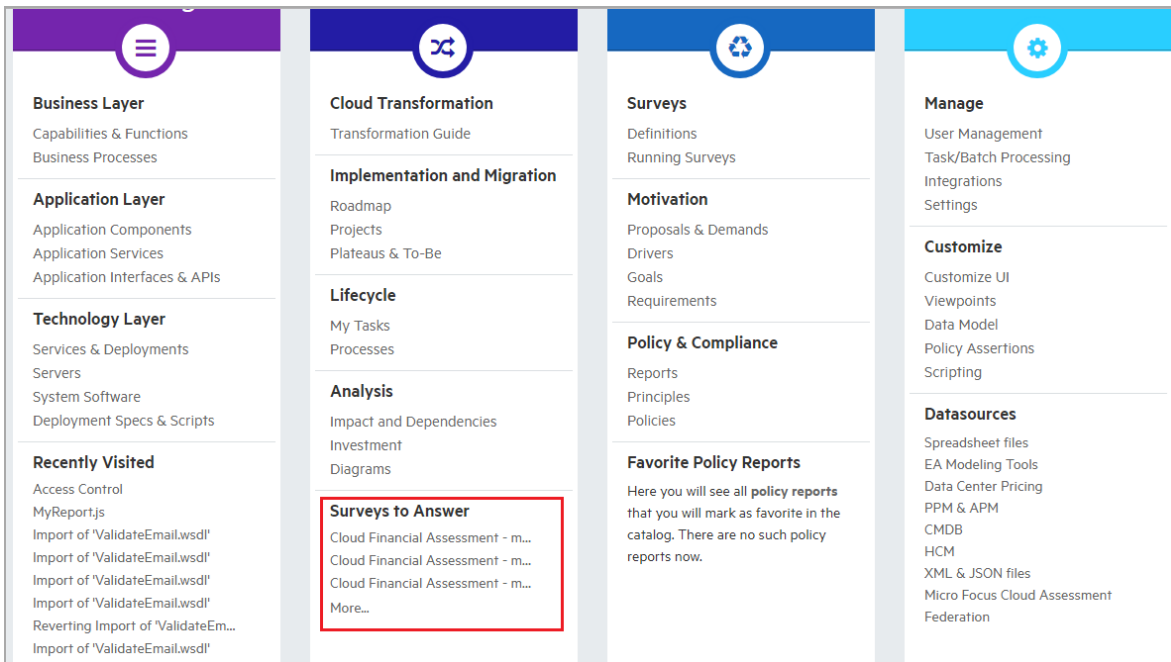
the option **Take Survey on behalf of [respondent name]**.



Keeping Track of Survey

As a survey respondent and user you can keep track of the surveys that require your response via Survey Tasks. These tasks are created for each respondent in a survey right after the survey is started, or when a user is added into that survey as a respondent. The task is removed once a respondent finishes the survey or is removed from the survey.

Survey respondents can follow their tasks to complete the surveys. The survey tasks are available right on Catalog page and Task page.



Tasks page

Task	Artifact	Artifact Type	Created
Cloud Technical Assessment - ASAC	ASAC	Application Component	2:11 PM
Cloud Financial Assessment - marketing applications	Oracle HRMS	Application Component	8/13/2015
Cloud Financial Assessment - marketing applications	Mason	Application Component	8/13/2015
Cloud Financial Assessment - marketing applications	Cofsoft	Application Component	8/13/2015

NOTE:

If a particular user does not have 'Read' permission to the survey artifact, the link to that artifact will not be available. See image below.

Task	Artifact	Artifact Type	Created
Cloud Technical Assessment - ASAC	ASAC	Application Component	2:11 PM
Cloud Financial Assessment - marketing applications	Oracle HRMS	Application Component	8/13/2015
Cloud Financial Assessment - marketing applications	Mason	Application Component	8/13/2015
Cloud Financial Assessment - marketing applications	Cofsoft	Application Component	8/13/2015

Reviewing Answers

Once you complete a survey, you can review your answers and even redo the survey.

Review Survey:

- Open the survey instance
- Click the surveyed artifact you wish to review the answers for
- Select **Review Answers**

Test, version 1.0
Survey

Located in Default Domain
no votes ★★★★★

Overview Mark Completed Cancel Survey Edit

Status: **Completed**
 Survey Definition: Cloud Financial Assessment
 Survey in Progress: 0/21
 Start Date: Dec 15, 2017 1:25:52 PM
 Expected Completion Date: Dec 15, 2017 11:59:59 PM

Surveyed Artifacts
 The list of the artifacts to be surveyed follows. You may cancel the survey of the selected artifacts if you are no longer interested in filling the survey wizard for them. The status of an artifact in the survey is 'Completed' if all the respondents answer, 'Not Completed' when at least one respondent does not answer and 'Not Started' when no respondents answer.

Remove from Survey

Name ↑	Version	Respondents	Status
<input type="checkbox"/> ASAC	1	Nicole Smith, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Dave Olson, Mary River	Not Started
<input type="checkbox"/>	1	Nicole Smith, Jack Foster, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Mary River	Not Started
<input type="checkbox"/>	1.0	Nicole Smith, Joseph Banks, Doris Wagner, Bev Bailey, Andy Miller, Dave Olson, Mary River	Not Started

Context menu for ASAC:
 Open in Catalog
 Add Respondent
 Review Answers

Redo the Survey:

- As one of the respondents, it is possible for you to redo the entire survey (assuming you have responded before) in the review dialog. Click **Take Survey Again**.

Answers for 'PeopleSoft HRMS (EMEA)' Application Component		Administrator
Question		
Financial Profile		
1	What are the current annual hardware costs for hosting this application in your data cente...	780000
2	What are the current annual costs related to maintenance of this application? (This doesn't...	650000
3	Are there some other costs related to this application?	
4	Please enter an estimate of these costs.	360000
3rd Party Associated Costs		
5	What are the current annual 3rd party software license costs related to this application?	25000
6	What are the current annual costs related to maintenance of this application billed by 3rd...	12500
Transformation		
7	If the application depends on a 3rd party software (database, middleware or similar) which...	No
8	Can your organization accommodate the billing model offered by cloud providers?	Yes
9	Is it feasible to get a budget and other resources needed for the transformation?	Don't know
Transformation Cost		
10	Can you put an rough estimate of the costs of the labour work/additional software costs n...	Yes
11	Please enter an estimate of these costs.	75000

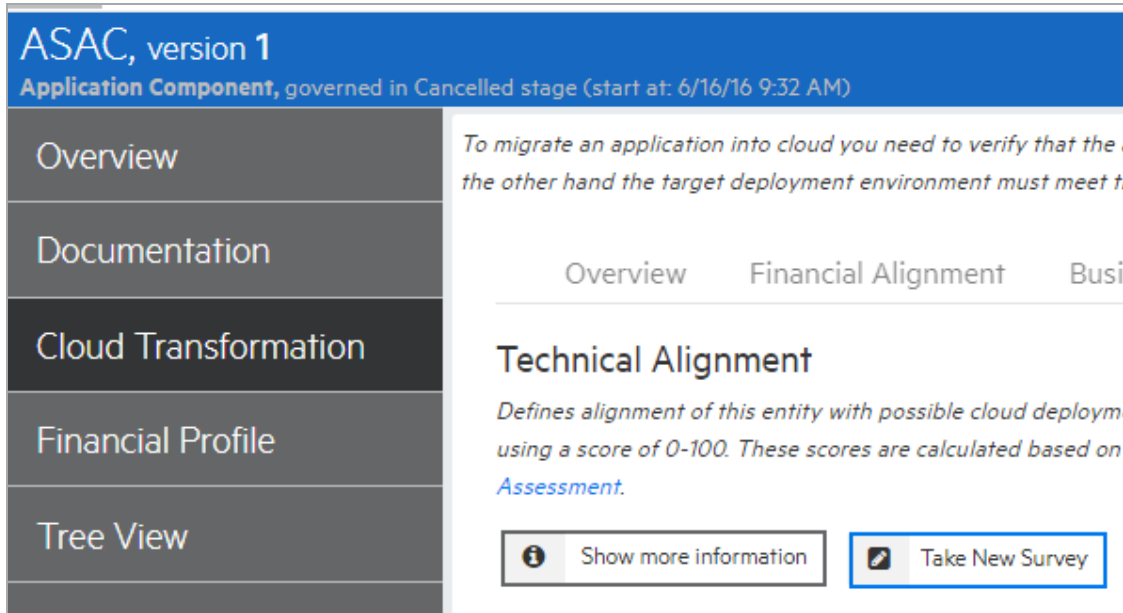
Taking a Self-Assessment Survey

Alternatively, as an artifact owner or contact, you can also fill out the survey for that artifact without having to wait for a Survey Manager to initiate it for you. There are two surveys designed out-of-the-box for self-assessment by Application Component's owner and contact.

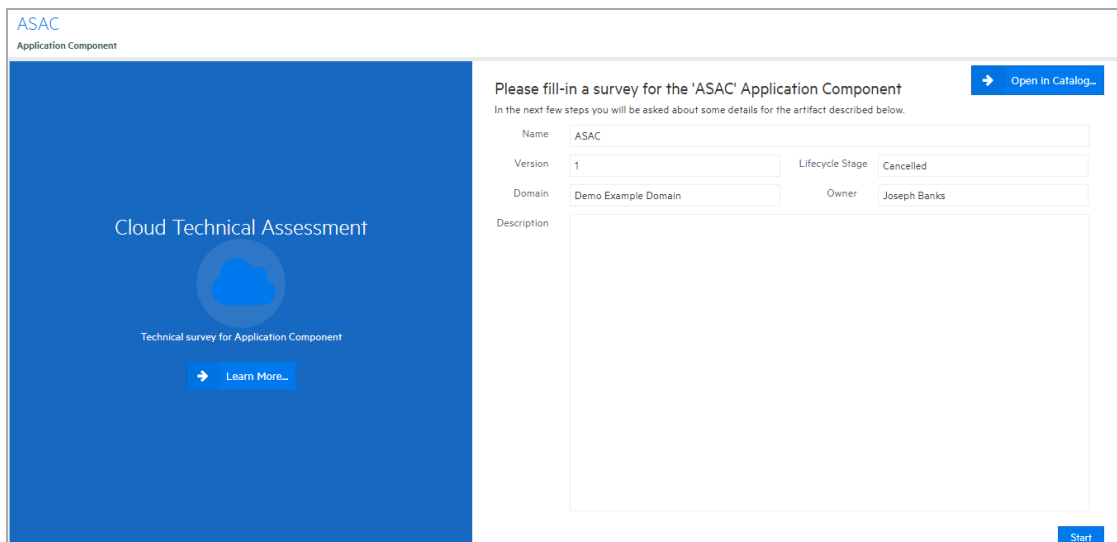
- In Business Alignment UI: survey 'Cloud Business Assessment'
- In Technical Alignment UI: survey 'Cloud Technical Assessment'

To fill out a self-assessment survey:

1. Open the Application Component view page.
2. Click the **Cloud Transformation** tab.
3. Navigate to **Business Alignment** or **Technical Alignment** tab.
4. Click **Take New Survey** button.



5. The survey opens in a new window. Click **Start** to begin answering the survey questions in the wizard.

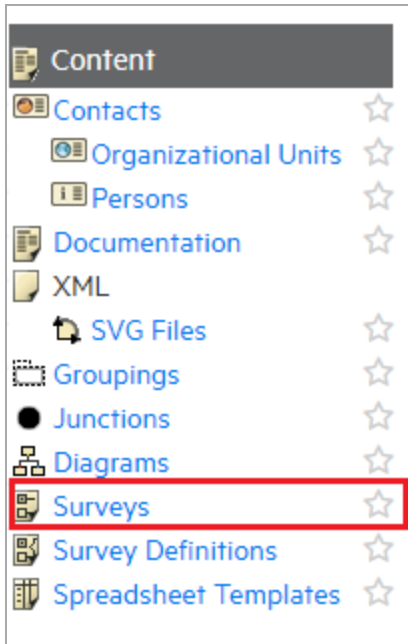


6. Click **Finish** to complete the survey.

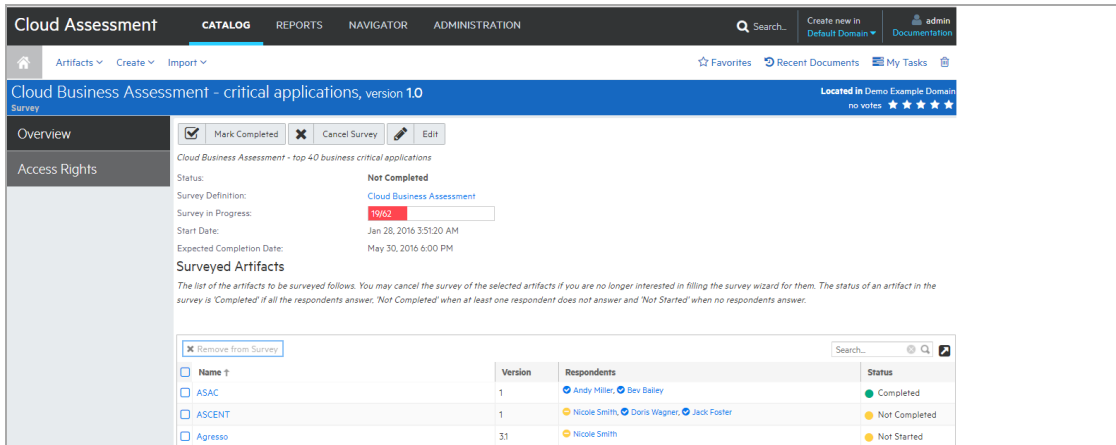
Monitoring and Managing Survey

To monitor or manage surveys :

1. Open Catalog Browser and click **Surveys** under Content tab.



2. Select a Survey to monitor or manage. The Survey view page opens as follows:



3. As per your role, you can execute all or some functions in the Survey view page. For instance :

- Catalog User can only view the status and progress of the survey.
- Survey Manager and Administrator can additionally :
 - Mark the survey as Completed.
 - Cancel the survey.
 - Remove artifacts from the survey if not completed.

- Edit survey information such as Description and Expected Completion Date.
- Add or Remove respondent to and from the survey.

Chapter 8: Collaboration

Cloud Assessment is a collaborative platform enabling you to actively participate and provide information to other users throughout the service lifecycle.

This part contains the following topics:

Tasks

- [How to Use Comments, on the next page](#)
- [How to Use Notifications, on page 106](#)
- [How to Use Events, on page 107](#)
- [How to Use Tasks, on page 109](#)
- [How to Use Ratings, on page 110](#)
- [How to Use Feeds, on page 111](#)
- [How to Share Artifacts, on page 113](#)

Cloud Assessment provides the following collaboration features:

- **Comments**

The Artifact View page provides a Discussion area where you can start threads and respond to other comments. For details, see [How to Use Comments, on the next page](#).

- **Notifications**

You can send e-mail notifications about an artifact to specified stakeholders. For details, see [How to Use Notifications, on page 106](#).

- **Events**

Events keep you up-to-date with changes to artifacts that you are a stakeholder in and user actions that may impact you. For details, see [How to Use Events, on page 107](#).

- **Tasks**

Tasks provide you with updates for lifecycle and contract tasks assigned to you. For details, see [How to Use Tasks, on page 109](#).

- **Ratings**

You can apply an individual rating to an artifact, contributing to an overall rating that enables other users to select the best artifacts. For details, see [How to Use Ratings, on page 110](#).

- **Feeds**

Cloud Assessment provides artifact and search feeds that enable you to track changes and discussions about artifacts in your feed readers and in the Reports tab. For details, see [How to Use Feeds, on page 111](#).

- **Sharing**

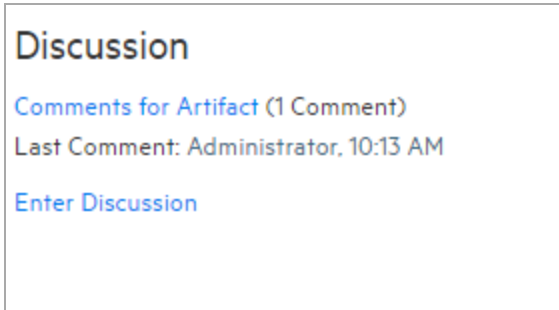
Cloud Assessment provides a simple action to provide all users with read access to an artifact, making it visible across the whole user-base. For details, see [How to Share Artifacts, on page 113](#).

Cloud Assessment is also a collaborative platform in combination with your development environments. Micro Focus Software provides plug-ins for widely used IDEs that enable your developers to collaborate using the discovery and publishing features of Cloud Assessment directly from their IDE.

How to Use Comments

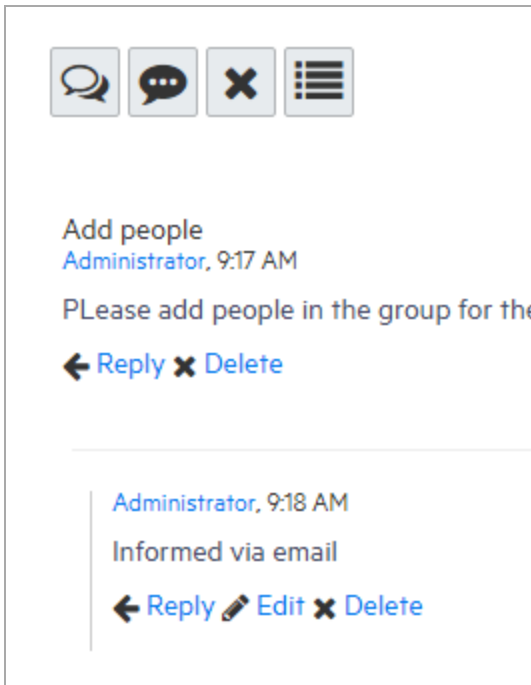
Cloud Assessment provides an artifact discussion forum where you can make comments about particular artifacts.

The Artifact Overview page includes a Discussion component right at the bottom showing the last few comments.



Click a thread title to enter that discussion or click *Enter Discussion* to open the **Documentation > Discussion** sub-tab to see all the comments


You can browse all comments in the Artifact Details Discussion sub-tab.



You can organize the Artifact View Discussion sub-tab using **Show Thread** and **Show List** with an option to sort the list view by oldest or newest comment first.

Start a new discussion thread using **Add Comment**.

TIP:

In the Add Comment dialog, click  to provide a reference link to another artifact in your

comment.

Respond to a particular comment using by clicking **Reply** for that comment.

If these are no replies to your thread or comment, you can **Edit** and **Delete** your comments.

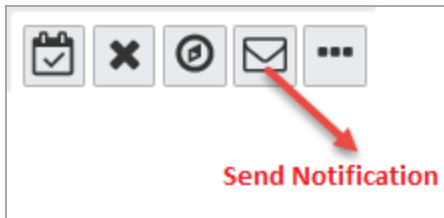
The Artifact Comments Feed context action provides a URL that you can use in feed readers or in the Reports Tab to keep up-to-date with any new comments about the artifact. For details, see [How to Use Feeds, on page 111](#).

How to Use Notifications

Micro Focus Cloud Assessment enables you to send e-mail notifications to artifact stakeholders.

To Send Manual Notifications:

1. In the Artifact Details page Overview tab, click the **Send Message** context action for the artifact you want to send the notification for, to open the Send a Message page.



2. Select the recipients to notify.

Notification Recipients

Recipient	Description
Owner	The user, group, or role that owns the artifact. "How to Edit Artifact ownership" in the UG.
Maintainers	Users, groups, and roles groups with write permission for the artifact. For details, see "How to Edit Access Rights in the UG.
Contacts	Users and organizational units associated with the artifact by the contact relationship or listed in the artifact stakeholder property. For details, see "How to Manage Contacts" in the UG. The Contacts recipient group can be refined into selectable contact roles.
Other Recipients	Click Add Other Recipients and use the user, group, and role search feature to add any other required recipients.
Previous Stakeholders	Expand Show Advanced Options and select Include Recipients from Previous Versions to notify stakeholders from previous versions of the artifact about changes to a newer version. The stakeholders notified by this option match those for the current artifact version. For example, if Consumers is selected, then the consumers of previous versions are notified.

NOTE:

The recipient options vary depending on the status of the artifact.

3. *Optional:* Change the subject for the mail if required.
4. *Optional:* Check **Lifecycle Status** to include a section containing current lifecycle status in the mail.
5. Enter the message text for the mail.
6. Click **Preview** to view a draft of the mail message.
7. Click **Send** to send the notification to the selected recipients.

The administrator can set up automatic notifications as part of the lifecycle process. For details, see "How to Define Automatic Actions" in the *Administration Guide*.

How to Use Events

Cloud Assessment keeps you up-to-date with all actions on artifacts that are relevant to you. Actions may appear in the Events lists because you performed them, or because they affect artifacts that you are a stakeholder for.

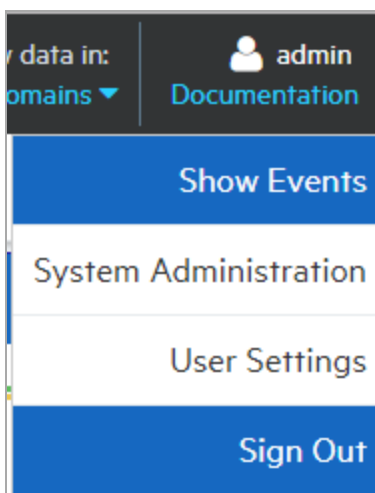
Events checker is disabled by default to keep up the server speed. However, the administrator can enable this checker by changing the value of `platform.ui.userevent.notificationsEnabled` system property to TRUE.

CAUTION:

Enabling `platform.ui.userevent.notificationsEnabled` system property can result in slow performance.

After enabling the event checker, events information appears in the following places in the UI:

- New Events notification in the Profile Status section of all pages.



- Actions on individual artifacts displayed in the Artifact Details page Events tab.
The Events components in the Artifact Detail page Overview tab display the latest actions performed in Cloud Assessment that are relevant to the user.

Overview	Actor: <input checked="" type="checkbox"/> Me <input checked="" type="checkbox"/> Others (Select All Clear)			
Documentation				
Cloud Transformation	Event	Actor	Date	Type
Financial Profile	🔍 New comment reply on thread 'Add people' has been added on Applica...	New admin	9:18 AM	Comments
Tree View	🔍 New comment thread 'Add people' has been created on Application Co...	New admin	9:17 AM	Comments
Lifecycle	🔍 New comment reply on thread 'What is data about?' has been added o...	New admin	9:17 AM	Comments
Compliance	🔍 New comment thread 'What is data about?' has been created on Applic...	New admin	8:30 AM	Comments
Access Rights				
History				
Events				

- Here, events component displays actions performed on the artifact with a **More...** link to the latest events under main menu Reports tab.

Events
🖨️ 🔄 ✕

Latest Events 🔔

- ⊘ Approval request for 'abc' failed due to a non-compliant policy
 by System, 7:40 AM, **New**
- + New approval request for 'abc' was created
 by System, 7:40 AM, **New**
- ↑ Plateau 'abc' was moved from stage Candidate to stage On roadmap
 by System, 7:40 AM, **New**
- ✓ Pending approval request for 'abc' was approved
 by System, 7:40 AM, **New**
- + New approval request for 'abc' was created
 by System, 7:40 AM, **New**

[More ...](#)

You can customize the information the Events component displays.

To Customize the Events Component:

1. Click the tool icon in the Events component on the home page to open the Edit Configuration - Events dialog box.
2. Customize the following events parameters:

Edit Configuration - Events
✕

i This configuration is shared by the Events portlet and event notifications. You can define important events; i.e. set event visibility.

Number of Events:

Domain: Current All Domains

Event Notifications Enabled:

Visibility

Contracts: Show All Hide My Actions Hide All

Lifecycle: Show All Hide My Actions Hide All

Artifact Changes: Show All Hide My Actions Hide All

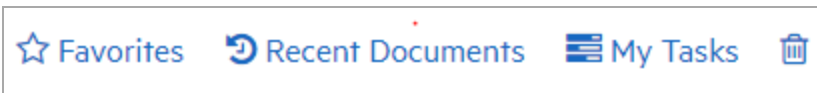
Task Reports: Show All Hide My Actions Hide All

Comments: Show All Hide My Actions Hide All

3. Click **Save** to apply your changes.

How to Use Tasks

As a user in Cloud Assessment you may be required to perform actions related to contracts and the lifecycle of artifacts. Tasks may be assigned to you as an individual, a member of a group, as a user in a particular role, or because you are the owner of an artifact. The My Tasks component in the Catalog Homepage updates you with your latest tasks assignments.



Catalog Homepage My Tasks Component

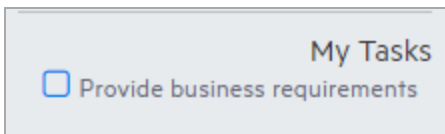
Task assignments come from lifecycle or as a result of a contract request. Click the task name to open the relevant page to view the lifecycle.

To view all your outstanding tasks, click **My Tasks** to open the Tasks page.

Tasks			
Task	Created	Source	
Provide business requirements	10:56 AM	Lifecycle Task	
Attach a documentation of Business Requirements type	9:44 AM	Lifecycle Task	
Define unsupported plateau	6/23/2016	Lifecycle Task	
Define unsupported plateau	6/23/2016	Lifecycle Task	
Deploy application into production environment	6/16/2016	Lifecycle Task	

The Tasks page shows more details about each tasks and enables you to sort them by type or filter to find a particular task or artifact.

In addition to viewing all tasks assigned to you, Artifact Details pages contains task information specific to the artifact in the My Tasks component.



The My Tasks component enables you to complete a lifecycle task to view its details.

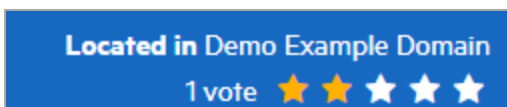
For all these task displays, clicking the task opens the appropriate page to perform the required actions depending on the task type.

- **Lifecycle Tasks**
Perform a task assigned to you, your group, or your role as part of a lifecycle process.
- **Lifecycle Requests**
Process requests for approval of the completion of a lifecycle stage for artifacts.

How to Use Ratings

Cloud Assessment enables you to apply a rating score to artifacts. You can apply a rating to each artifact once and change your rating at any time.

The average rating is available in Artifact Detail pages and in tables of artifacts, enabling you to choose services based on their collective rating.



To Rate an Artifact:

1. Open the Artifact Details page.
2. Move the cursor over the stars and click a star to set your rating. The status next to the rating stars indicates the current status and indicates if you have previously rated the service.

Average ratings are available to filter and sort tables of artifacts. For details, see "Tables in the User Interface".

Services		All	Located in: All Domains	Filter
Name	Domain	Rating	Package	Lifecycle Stage
<input type="checkbox"/> ☆ Accounting	Demo Example Domain	<input checked="" type="radio"/> All		Candidate
<input type="checkbox"/> ☆ Advisory Results Display Services	Demo Example Domain	<input type="radio"/> ★★★★★		Candidate
<input type="checkbox"/> ☆ Advisory Results Report Services	Demo Example Domain	<input type="radio"/> ★★★★★☆		Candidate
<input type="checkbox"/> ☆ Arrangement of meeting with BaPo	Demo Example Domain	<input type="radio"/> ★★★★★☆		Candidate
<input type="checkbox"/> ☆ B2B	Demo Example Domain	<input type="radio"/> ★★★★★		Candidate
<input type="checkbox"/> ☆ CSO	Demo Example Domain	☆☆☆☆☆		Candidate
<input type="checkbox"/> ☆ Collecting Client's Cash-Flow Information	Demo Example Domain	☆☆☆☆☆		Candidate
<input type="checkbox"/> ☆ Collecting Information about Client's FinBank Products	Demo Example Domain	☆☆☆☆☆		Candidate
<input type="checkbox"/> ☆ Collecting Information about Client's OFI Products	Demo Example Domain	☆☆☆☆☆		Candidate

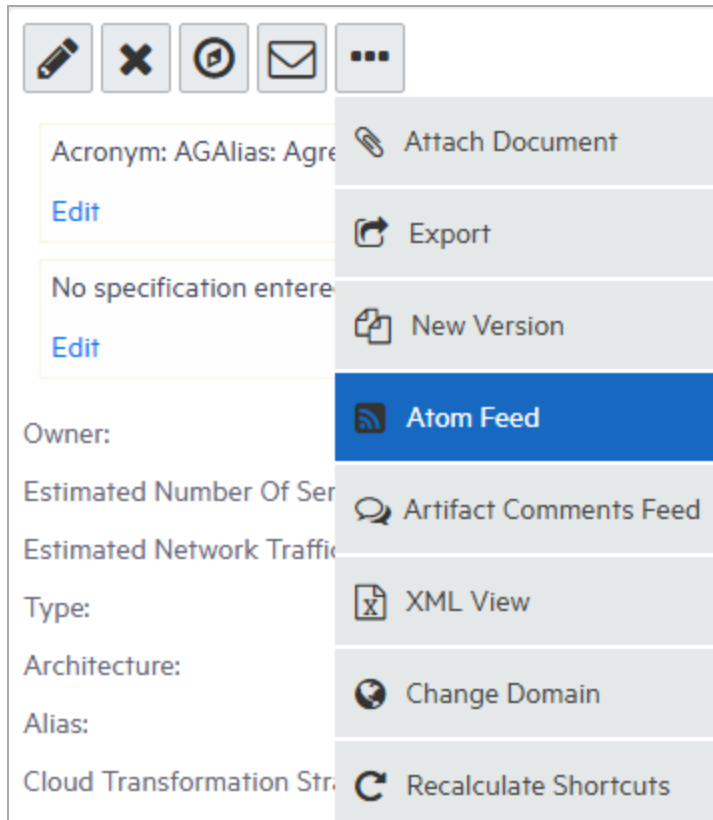
How to Use Feeds

Cloud Assessment provides Atom feed support to enable you to track changes either with your own feed reader or using the Content Feed feature of the Reports Tab.

You can access the following feeds:

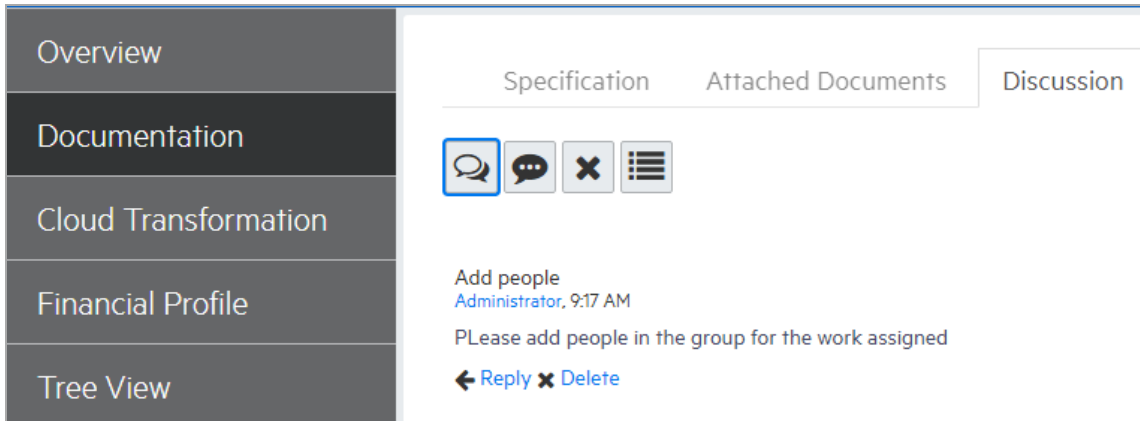
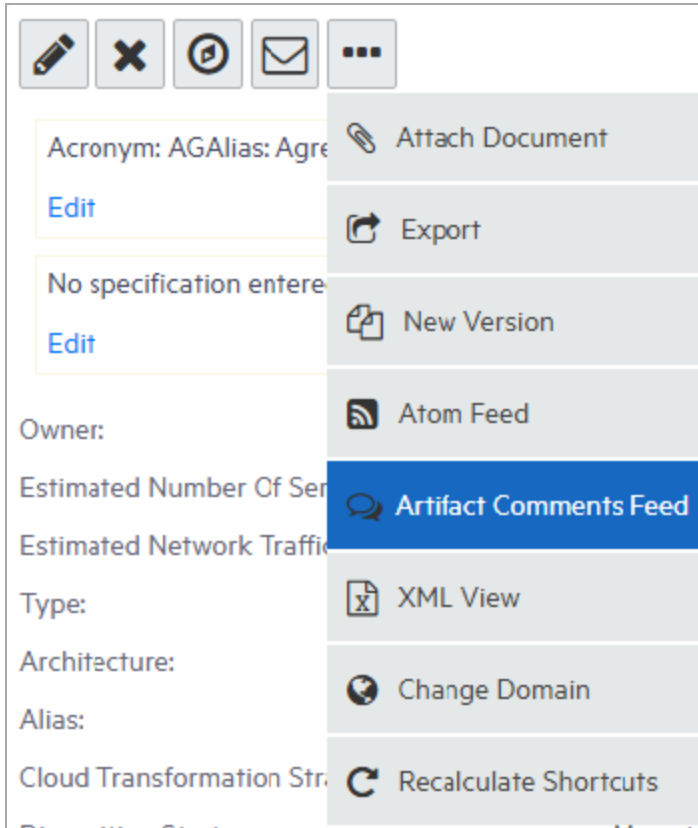
- **Individual Artifact Feeds**

Track changes to a specific artifact. Use the **Atom Feed** context action from the Artifact Details page Overview or Details tabs to obtain the URL for the feed.



- **Individual Artifact Comment Feeds**

Track the discussion about a particular artifact. Use the **Artifact Comments Feed** context action from the Artifact Details page Overview or Details tabs or the **Artifact Comments Feed** context action from the Artifact Details page Discussion section of the Documentation tab to obtain the URL for the feed.



- **Search Result Feeds**

Use the Search URL provided with saved searches to create a custom search feed. A typical example would be to create a search feed for all services. This feed would then notify you about the creation of new services.

How to Share Artifacts

By default, the separation of the Catalog into domains and default security mean that artifacts are only visible to users who need to see them. However, there are situations where you want to make an artifact visible to all users, for example, when a service goes into Production.

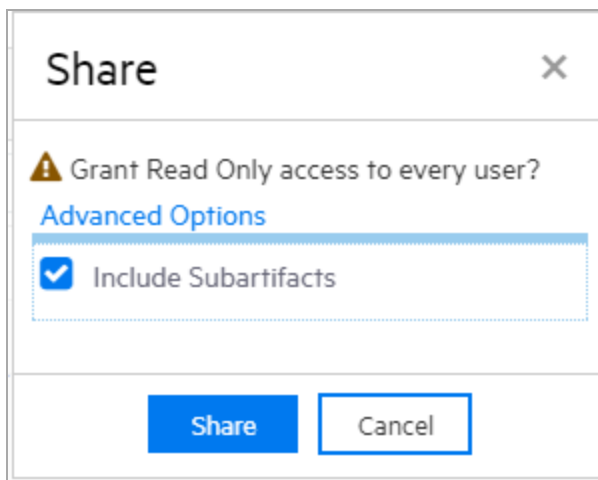
Cloud Assessment provides a simple share mechanism which enables the administrator or the owner of an artifact gives all users read access to an artifact, making it visible to everyone. Share may be performed on an individual artifact or in bulk.

NOTE:

The default functionality of sharing uses the `system#registered` group which represents all users who access Cloud Assessment. The administrator can change the users that can access shared artifacts. For details, see "How to Change the Sharing Principal" in the *Administration Guide*.

To Share an Artifact:

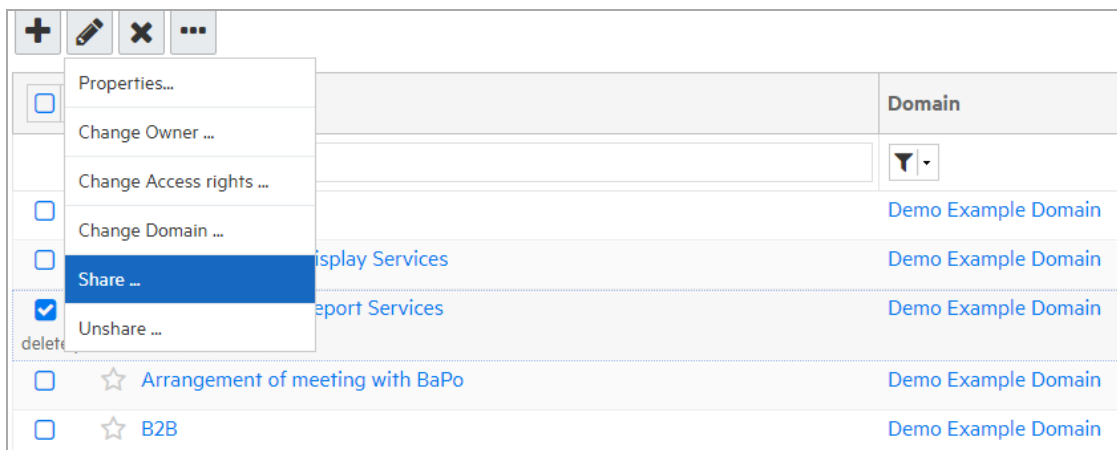
1. Open the Artifact Details page for the artifact and select the Access Rights tab.
2. Click the **Share** context action to open the Share dialog box.
3. *Optional:* Expand **Advanced Options** and select **Include Subartifacts** to also share sub-artifacts in the artifact aggregate.



4. Click **Share** to make the artifact visible to all users.

To Share a Set of Artifacts:

1. From a table of artifacts, select the artifacts to change, open the **Edit** context menu, and select **Share** to open the Share dialog box.



2. *Optional:* Expand **Advanced Options** and select **Include Subartifacts** to also share sub-artifacts in the artifact aggregates as in step 3 above.
3. Click **Share** to make the selected artifacts visible to all users.

Chapter 9: Excel/CSV File Export and Import

Cloud Assessment provides the capability to export and import data in spreadsheet formats. This is useful if you want to transfer spreadsheets or relational databases data from other systems to Cloud Assessment. You can also edit multiple data sets efficiently in spreadsheet format in offline mode and upload the data back to Cloud Assessment in one step.

The following operations are supported by Spreadsheet Import UI:

- Export an artifact collection to a CSV file
- Export multiple artifact collections to a ZIP file (which contains CSV files and each of them contains a collection of artifacts)
- Import an artifact collection from a CSV file
- Import multiple artifact collections from an XLS or XLSX file

NOTE:

Some operations are not available for Spreadsheet Import Command Line. For more details, see "CSV Import and Export Tools" in *Customization Guide*.

To populate a simple collection from a spreadsheet file, a good practice to begin with is to create one artifact in the Cloud Assessment collection by using the Catalog, open the collection list, select it, and then use the *Save as CSV* function to access the CSV file from Cloud Assessment. You can then open the result in a spreadsheet editor such as Excel, add more data in the specified form as per the first record, and then use the *Excel/CSV import* to publish all the data inside Cloud Assessment.

You can also store successfully imported spreadsheet files as templates for future use. For more information, go through below mentioned topics:

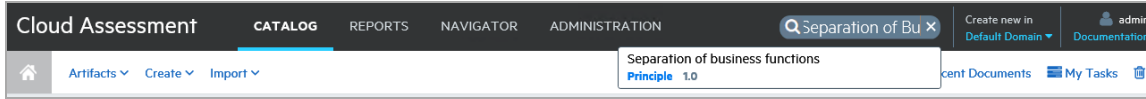
- [Exporting CSV Files, below](#)
- [Importing Spreadsheet Files, on page 118](#)
- [Managing Template, on page 120](#)
- [Spreadsheet Template Options, on page 124](#)

Exporting CSV Files

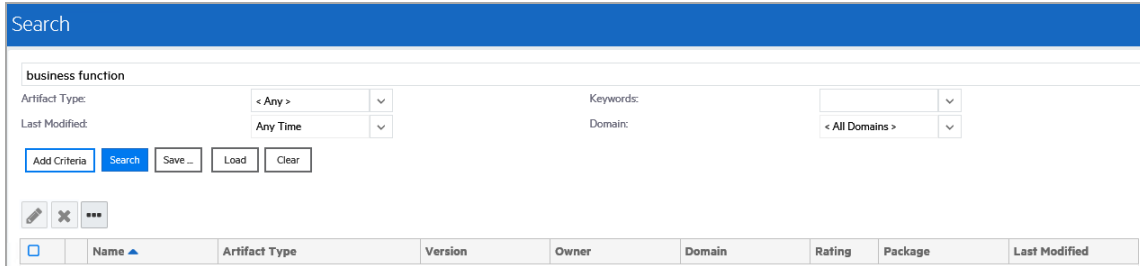
To export CSV data from Cloud Assessment:

1. Open the Catalog in a browser.
2. If the collection you are interested in is empty, create the first artifact so that the exported CSV file contains an example data row.
3. Open the collection you are interested in either by searching for it in the Search box or by opening the collection from the Catalog panel. For example, to open the Business Function collection, select *Capabilities & Functions* from the Catalog panel list and perform your search by clicking the Filter menu to open the Search page. Then you can the Business Function value from the Artifact Type selector and click Search.

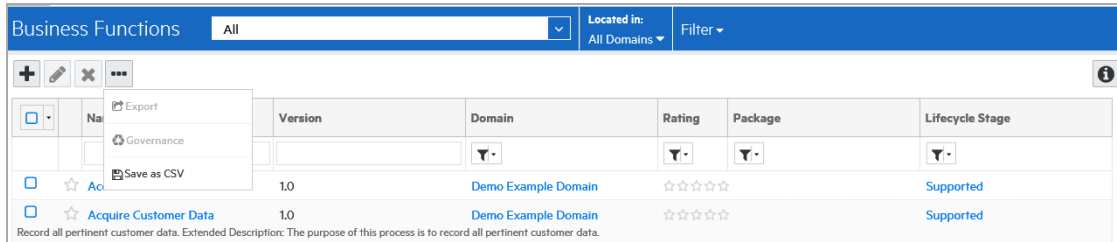
- Option A: Using the Menu Bar Search Field



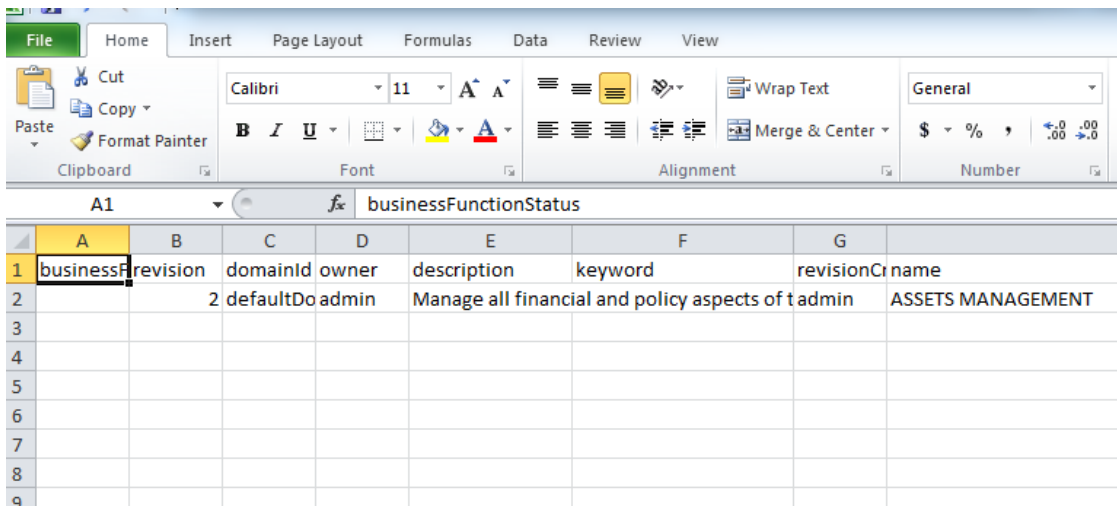
- Option B: Using the Catalog Search Page



4. After you have located and opened the collection you are interested in exporting, click the More Actions button (e.g., the button with three dots next to the Edit and Delete buttons), and click Save as CSV. This will start the download of data in CSV format from the table to your local computer.



5. Open the downloaded CSV file in a spreadsheet editor, such as Excel. The first row is a header that specifies the mapping of data in Cloud Assessment. It helps you to learn how to link the data in specific columns to properties, relationships, etc.



6. Remove unnecessary and redundant headers. For example: delete all columns but keep the following headers: businessFunctionStatus, revision, domainId, owner, description, keyword, revisionCreator, name. Add new data to complete the collection in spreadsheet, and when you are finished, make sure to Save as CSV. Once you do this, you are ready to Import back into Cloud

Assessment.

	A	B	C	D	E	F	G	H
1	businessF	revision	domainId	owner	description	keyword	revisionCr	name
2		2	defaultDo	admin	Manage all financial and policy aspects of t		admin	ASSETS MANAGEMENT
3		2	defaultDo	admin	Provide assurance to senior management		admin	AUDIT MANAGEMENT
4		4	defaultDo	admin			admin	Access Control
5		2	defaultDo	admin	Record all pertinent customer data. E		admin	Acquire Customer Data
6		3	defaultDo	admin			admin	Advisory Engine
7		2	defaultDo	admin	Identify		admin	Allocate & Install Resource
8		2	defaultDo	admin	Issue identifiers for new services and to m		admin	Allocate Specific Service Paramet
9		2	defaultDo	admin	Ensure that a consistent customer risk asse		admin	Analyze & Manage Customer Risk
10		2	defaultDo	admin	Analyse & Report S/P Interactions prc		admin	Analyze & Report S/P Interaction
11		2	defaultDo	admin	Perform all necessary analysis on closed re		admin	Analyze & Report on Customer
12		2	defaultDo	admin	Analyse and		admin	Analyze Resource Performance
13		2	defaultDo	admin	Assess the effectiveness of the service by		admin	Analyze Service Quality
14		2	defaultDo	admin	Generate reports on usage records based c		admin	Analyze Usage Records
15		2	defaultDo	admin	Ensure that the customer receives an invo		admin	Apply Pricing Discounting & Reba
16		2	defaultDo	admin			admin	Approve Product Business Case

Importing Spreadsheet Files

To import spreadsheet files, first decide what type of information and relationship data you want to import and also how you would like to view the results of your import mapped into Cloud Assessment repository.

Preparing Spreadsheet Files

To import the spreadsheet files successfully, you must follow the Cloud Assessment spreadsheet syntax. Do one of the following to obtain a valid spreadsheet file and then start adding data into it:

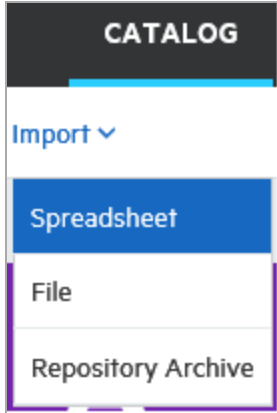
- Use *Download Template to Get Started* to download from a spreadsheet artifact. For more details, see the section *To download Excel/CSV Import Template* in "Managing Template".
- Use *Save as CSV*. For more details see, "Exporting CSV Files".
- See `CloudAssessment_HOME/client/demo/import` folder to refer to examples of CSV and XLS/XLSX files. For example: for XLS/XLSX spreadsheet syntax, follow the path `CloudAssessment_HOME/client/demo/import/excel/from-ui/*.xlsx`.

Using UI

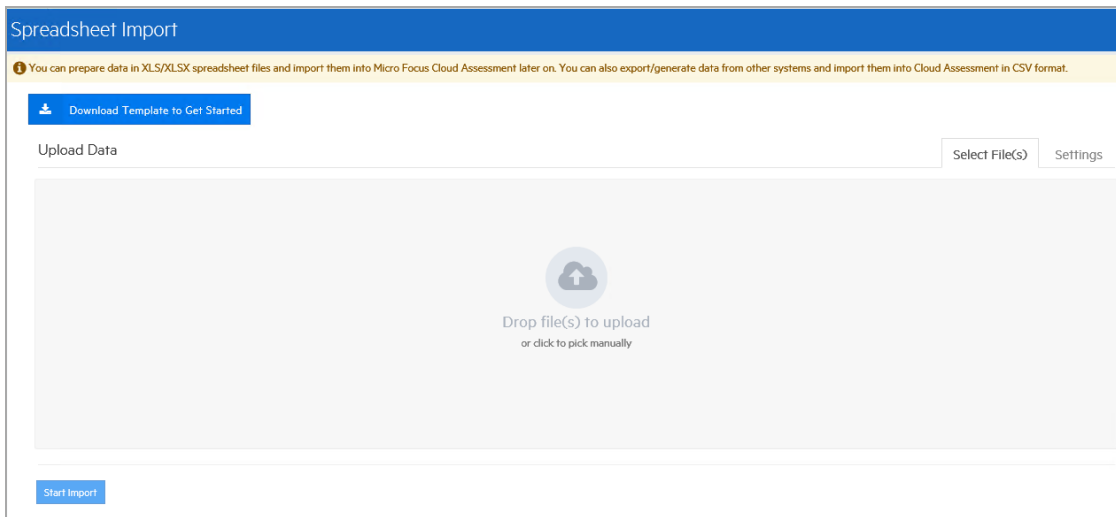
Cloud Assessment provides the option to directly import the Excel/CSV file from the Catalog UI.

To do so, follow the instructions given below:

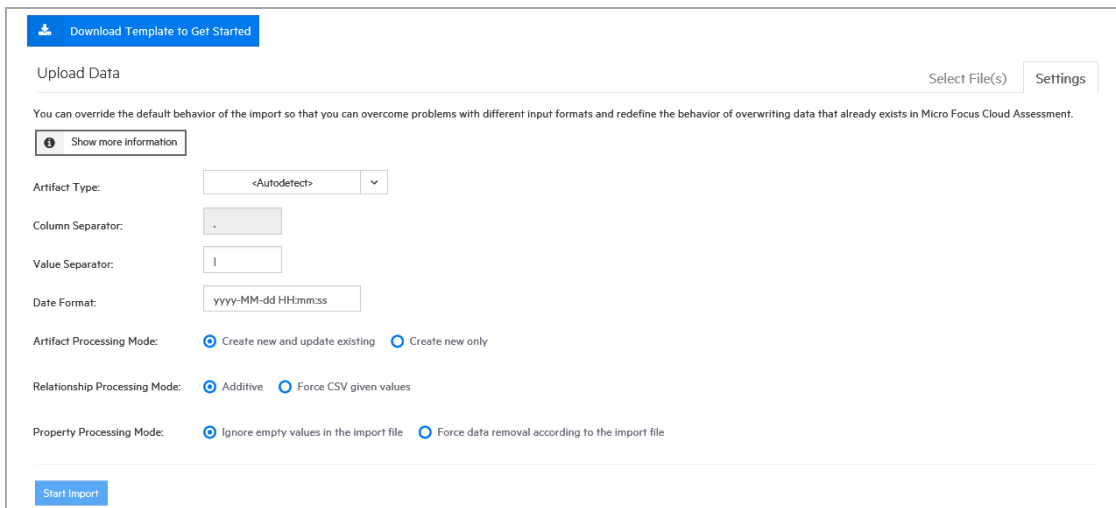
1. Go to the Catalog home page. Click the Import menu and select **Spreadsheet**.



2. In the Spreadsheet Import page select the CSV/XLS/XLSX file to drag and drop from your local folder. Alternatively, click anywhere in the box to manually upload.



3. Click **Settings** to view more options and **Show More Information** button to view their usage.



4. Select the Artifact Type from the drop down list. If artifact type is <Autodetect>, the artifact type will be determined by CSV file names or Excel sheet names as follows:
 - a. Matches artifact type in SDM. For example: *applicationComponentArtifact*
 - b. Starts with artifact type in SDM and a dash (-). For example: *applicationComponentArtifact-sample*
5. Click **Start Import**. The Import Spreadsheet report appears.

Name	Type	Domain	Owner	Origin	Status	Processed At
Artifact 'App DB Sample' import. <small>Artifact 'App DB Sample' has been imported. Performed actions 'CREATE'.</small>	Application Compon...	Default Domain	david	Applications (1).xlsx/...	Created	3:03 PM
Artifact 'App AS Sample' import. <small>Artifact 'App AS Sample' has been imported. Performed actions 'CREATE'.</small>	Application Compon...	Default Domain	david	Applications (1).xlsx/...	Created	3:03 PM
Artifact 'App Sample' import. <small>Artifact 'App Sample' has been imported. Performed actions 'CREATE'.</small>	Application Compon...	Default Domain	david	Applications (1).xlsx/...	Created	3:03 PM

Using Command Line

If you are an administrator or have administrator role privileges you will find the CSV Importer command line tool in the CloudAssessment_HOME\client directory. If you are not an administrator, you can ask your administrator to archive the tool and share it with you so that you can access it.

To get the CSV Importer command line tool and be able to run it:

1. Unzip the archive and open a command-line shell and change to the client/bin directory. The tool depends on java 1.8, so make sure you have access to the java command at the PATH variable.
2. Call `csvimport.bat` or `csvimport.sh` to get help messages displaying the command-line options.
3. Type the command with at least host, user, password, sdmName and file parameters to your environment. For example: `csvimport -host http://microfocusdemo/cloudassessment -user admin -password changeit -file businessFunctions.csv -sdmName businessFunctionArtifact`
4. The CSV import of Business Functions from CSV file starts. The tool will log all events related to the progress and status of the import.
5. When you refresh your browser, you can view the results imported into the Cloud Assessment collection.

NOTE:

Importing a huge spreadsheet file may fail because of Out Of Memory error. To overcome this problem, increase the heap memory as below:

- 2MB excel file - 100MB heap
- 10MB excel file - 1.5GB heap

For more details, see "CSV Import Tool" in the *Administration Guide*.

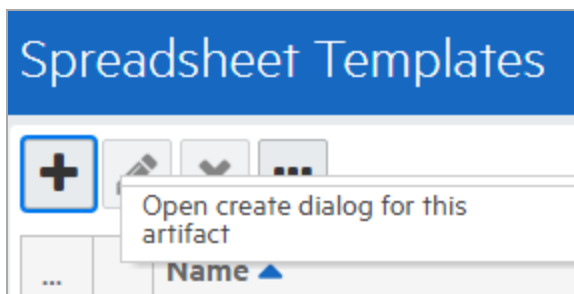
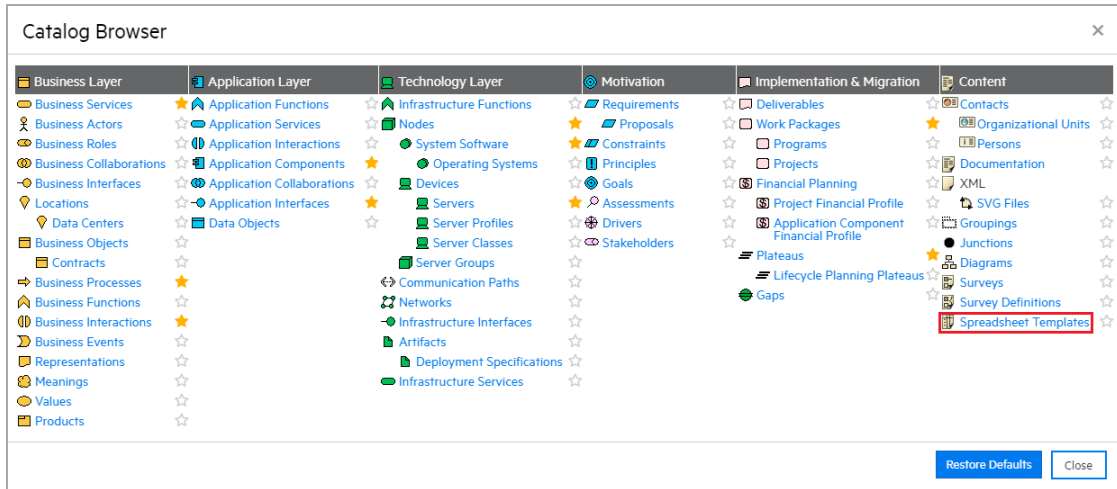
Managing Template

The Spreadsheet Templates provide the initial structure for data to be imported using Import Excel/CSV function. As a Catalog user, you can create such templates for your own usage or share

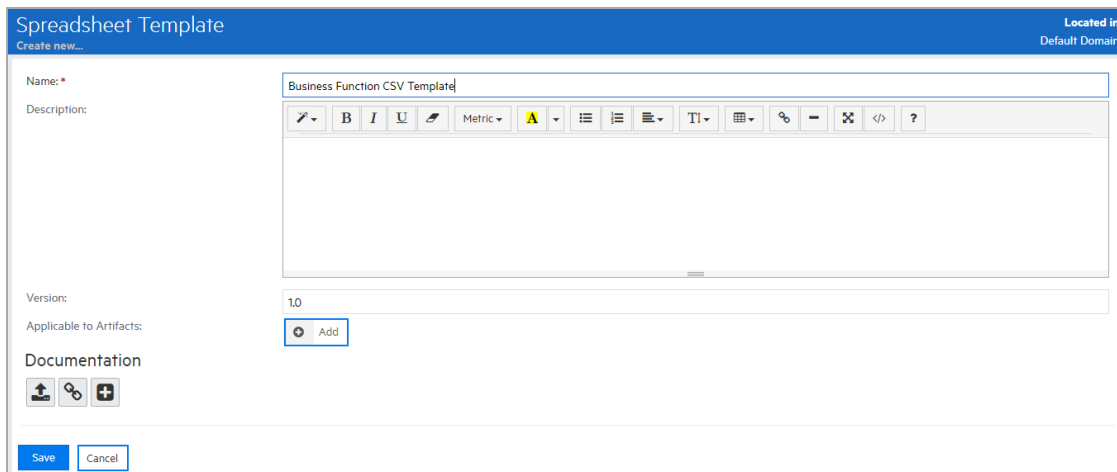
with others. Administrator can change access rights for Excel/CSV Import Templates as with other artifacts.

To create a new Excel/CSV Import Template:

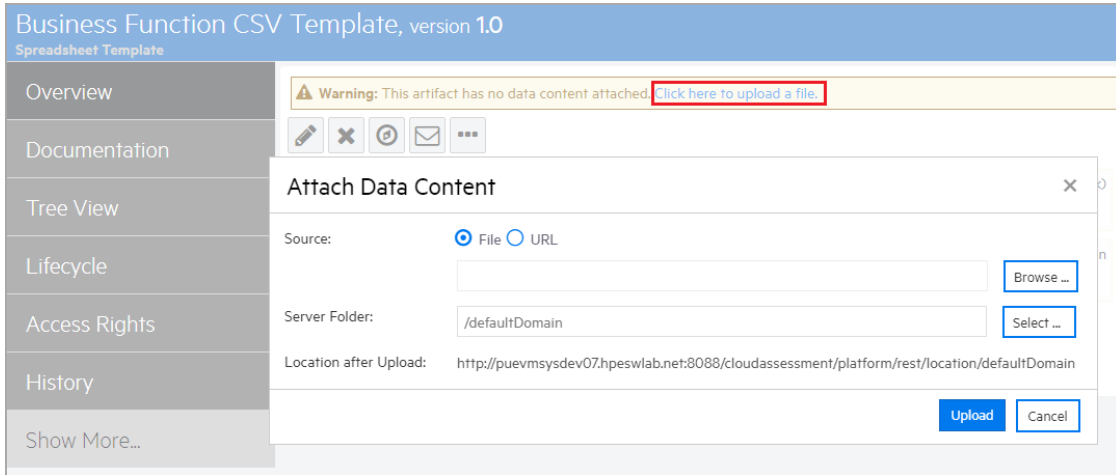
1. Open the Catalog Browser and then click **Spreadsheet Templates**. In the next screen click **Open create dialog for this artifact**.



2. Enter the name of the template and select the artifact types this template applies to in **Applicable to Artifacts** section and click **Save**.



3. In the template view page, click the **Click here to upload a file** link to add the Excel/CSV file for this template.



4. Click **Browse** and select the Excel or CSV template file and then click **Upload**.

NOTE:

- You can use 'Save as CSV' function in artifact collection or search pages to produce CSV files and use them as CSV templates. For details, see [Exporting CSV Files, on page 116](#).
- To create Excel/CSV template manually (for example: using Microsoft Excel), refer to "CSV Import Tool" in *Customization Guide* to get help on syntax for Excel/CSV files.

Name	Date modified	Type	Size
applicationComponentArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
applicationFunctionArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
applicationServiceArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
businessEventArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
businessFunctionArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
dataObjectArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB
plateauArtifact.csv	14/07/2015 20:17	Microsoft Excel Co...	1 KB

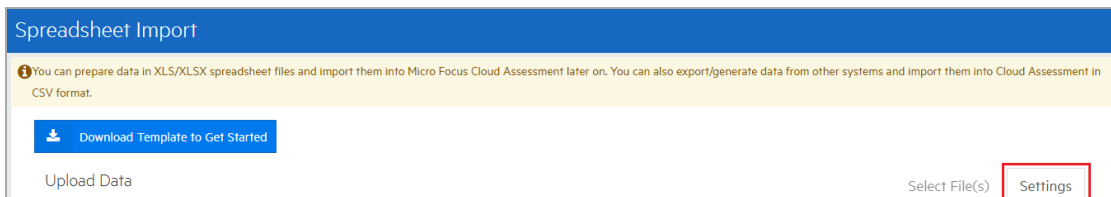
5. To verify the template created, open 'Spreadsheet Templates' collection.

Spreadsheet Templates		All	Located in:	Filter	
			All Non-Reference		
...	Name	Version	Applicable to Artifact	Domain	Rating
<input type="checkbox"/>	Application Deployment Template	1.0	Infrastructure Service	Top-level Domain	☆☆☆☆☆
XLSX template that let you create a single application deployment with its servers and installed system software.					
<input type="checkbox"/>	Applications - Contacts Template	1.0	Application Component	Top-level Domain	☆☆☆☆☆
XLSX template with applications and their business, financial and technical contacts.					
<input type="checkbox"/>	Basic Data Import Template	1.0	Server,Operating System,Infrastructure ...	Top-level Domain	☆☆☆☆☆
XLSX template that let you import basic data into HP EM so that you can utilize the reporting capabilities of HPE Enterprise Maps.					
<input type="checkbox"/>	Contacts Template	1.0	Person	Top-level Domain	☆☆☆☆☆
XLSX template with user profiles so that users can be used as artifact's contacts before the users login.					

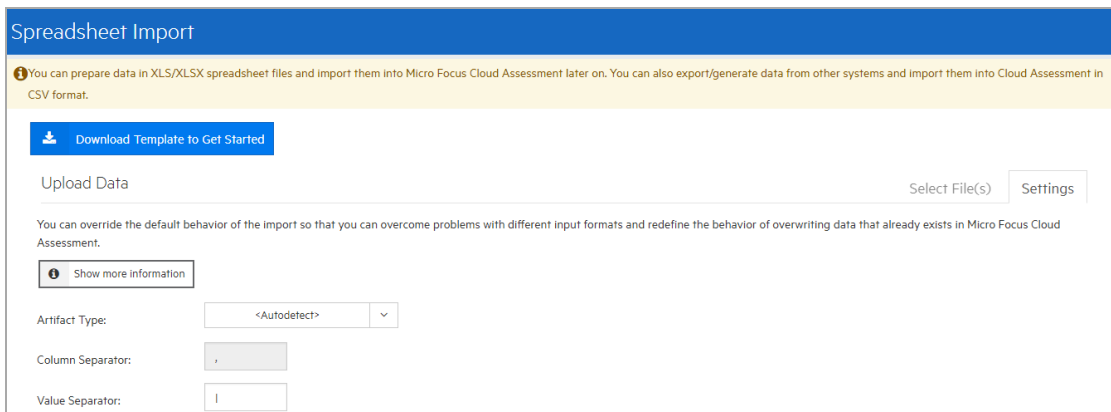
The Spreadsheet Import UI provides a convenient way to download the template of a specific artifact type.

To download Excel/CSV Import Template:

1. Go to **Import** tab, click **Spreadsheet** and then click the **Settings** tab.



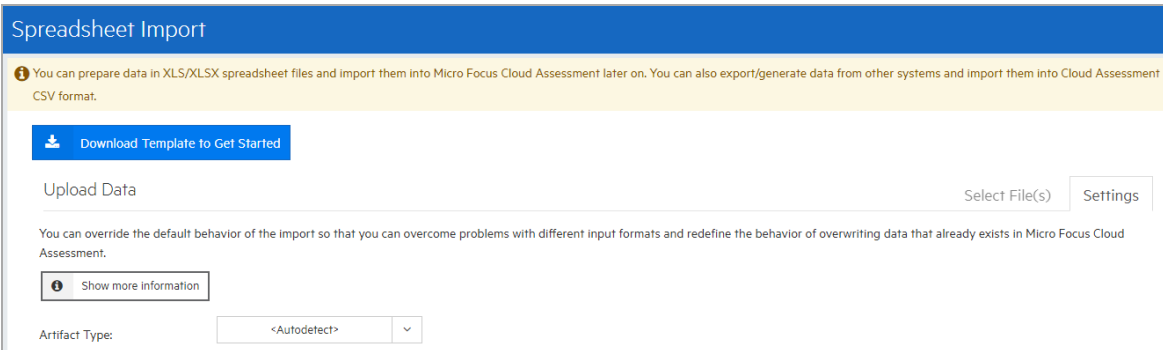
2. Select an artifact type. The **Upload Data** is automatically changed to **Upload Data about...** to inform the selected artifact type for downloading template or uploading data.



3. Click **Download Template to Get Started**. You can then add data into the saved template and import the Excel/CSV file back to Cloud Assessment to publish data.

NOTE:

- If such a template is not available, the template of higher-level artifact type, if exists, is used instead. An example of template hierarchy is as below:
Artifact > Application Layer > Application Component > J2EE Application.
- If the template for J2EE Application does not exist, then template for Application Component is used and so on.
- In the case of no available templates, users are prompted to download a default template for Application Component (as in the image below).



Spreadsheet Template Options

While working with Excel templates, you may enter data which is non-importable. You can ignore such meta data by specifying instructions in the spreadsheet import function.

Add the following options at the beginning of the excel sheet:

Column 1 Keyword	Option Name	Option Parameters	Option Parameters	Description
<i>Option</i>	<i>ignore</i>			Ignore this sheet
<i>Option</i>	<i>sdmName</i>	<Artifact type in SDM>		Import data as this artifact type
<i>Option</i>	<i>skipRowWhenEmptyFirstCell</i>			Skip data row if first column is empty
<i>Option</i>	<i>constantColumn</i>	<Property in SDM>	<Property value>	Add this property for all imported artifacts
<i>Option</i>	<i>calculateFormula</i>	auto/true/false		<p>auto - recalculates a cell value that is defined by a formula. If the formula is not supported, use the cell's last value. This is the default value.</p> <p>true - fails if unable to calculate formula</p> <p>false - uses only the cell's last value</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p>NOTE: Data referenced by formula must be in the same spreadsheet file. Referencing data in a different</p> </div>

				spreadsheet file is not supported.
--	--	--	--	------------------------------------

Ignored rows

- Rows before the header and the first column starting with capitalized text is ignored (except above 'Option' rows).
- Rows after the header and the first column that is empty are ignored if *Option skipRowWhenEmptyFirstCell* is set.

Ignored columns

- Columns with empty header are ignored.

	A	B	C	D
1	Option	sdmName	applicationComponentArtifact	
2	Option	constantColumn	description	Imported from spreadsheet
3	Option	skipRowWhenEmptyFirstCell		
4	Option	calculateFormula	auto	
5	Component Name	Version	Ignored	Subcomponents
6	name key=true	version		composedOf target=applicationComponentArtifact property=name
7	Demo Component 1		1	
8	Demo Component 2		3	
9		This line is ignored because of the skipRowWhenEmptyFirstCell Option		
10	Demo Composed Component		3	Demo Component 1 Demo Component 2
11				

Chapter 10: Extension for Sparx Systems EA

Cloud Assessment integrates with the widely used Sparx Systems Enterprise Architect data modeling tool via extension module. The Sparx Systems EA is a fully integrated data modeling environment for you to use with Cloud Assessment. The Cloud Assessment user is able to synchronize data models bi-directionally using the extension.

Installing Extension for Sparx Systems EA

You can install the Cloud Assessment Extension for Sparx Systems EA to extend your local installation of Sparx Systems EA to synchronize models with the Cloud Assessment server.

You must already have Sparx Systems EA installed. For more details of supported Sparx Systems EA versions, see "Supported Product Integrations" in *Installation and Configuration Guide*.

To install the Cloud Assessment Extension for Sparx Systems EA:

1. Close Sparx Systems EA if it is running.
2. Run the installer `microfocus-cloudassessment-sparx-1.01.msi`.
3. Click **Next** until the final wizard panel appears, and then click **Finish**.

WARNING: Extension for Sparx Systems EA stores the Cloud Assessment user password(s) using a Triple DES password encryption method. User passwords are stored outside the Cloud Assessment server, thus bypassing Micro Focus security policies. This could cause security issues such as decryption or corruption.

NOTE:

To avoid error when installing Sparx Systems EA into a Windows system folder, disable User Access Control (UAC) in Windows Control Panel.

To configure proxy in Cloud Assessment Sparx Add-In:

Change the default setting of Cloud Assessment Sparx Extension, to connect to Cloud Assessment server from Sparx client via proxy.

1. Close Sparx Systems EA if it is running.
2. Go to Cloud Assessment Extension data folder on your local machine: `C:\Users\{USER}\AppData\Roaming\Cloud Assessment Extension for Sparx EA\`.
3. Open the file `settings.xml`.
4. Edit this file by adding proxy setting element under the "<repositories>" node:

```
<proxy proxyEnabled="True" proxyUrl="http://127.0.0.1:12000" requiresAuth="True"
username="username" password="password" />
```

Add your proxy URL instead, and the required authentication if you have.

```
<repositories>
  <proxy proxyEnabled="True" proxyUrl="http://127.0.0.1:12000" requiresAuth="True" username="username" password="password" />
  <useSharedRepository>False</useSharedRepository>
  <showChangeArtifactTypeConfirmDialog>True</showChangeArtifactTypeConfirmDialog>
  <enableLockArtifact>True</enableLockArtifact>
  <warnArchimate_1>True</warnArchimate_1>
  <unlockVersionControlConfirm>True</unlockVersionControlConfirm>
  <showProjectMeta>False</showProjectMeta>
  <enableAutoSync>False</enableAutoSync>
  <keepDeletedElement>False</keepDeletedElement>
  <autoSyncTime>00:00</autoSyncTime>
  <svnAutoCheckOut>True</svnAutoCheckOut>
  <refreshLockPeriod>5</refreshLockPeriod>
</repositories>
<default>hpswvm233071.hpswlab.adapps.hp.com-8080-em-7eb68058-c5a0-4682-9595-f384957e7170</default>
</repositories>
```

5. Save the changes.

Supported Archimate® version

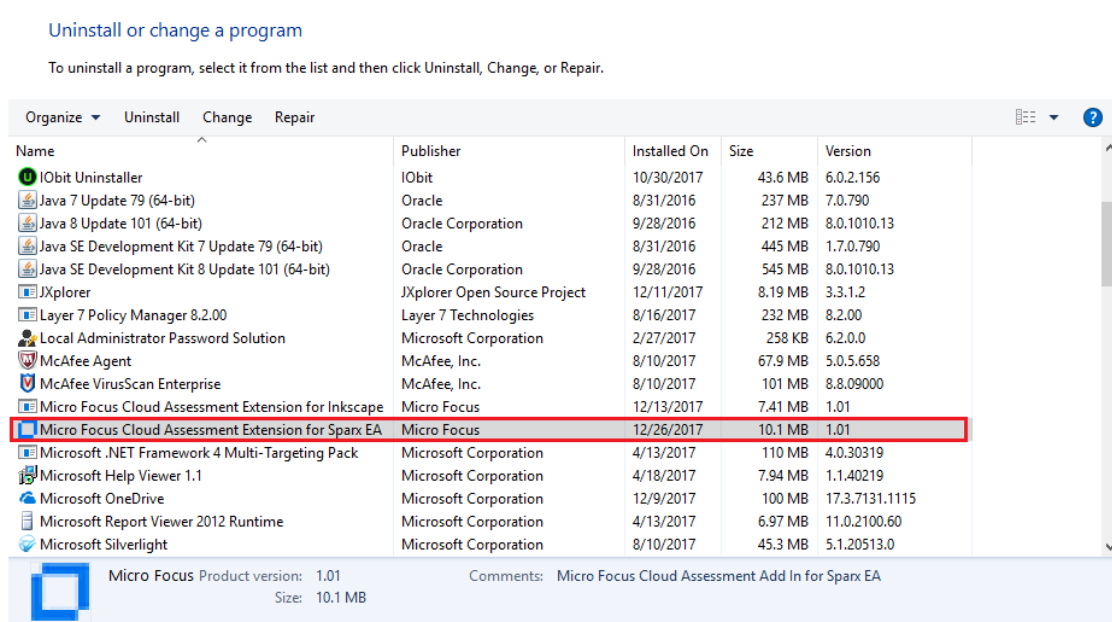
Cloud Assessment Sparx Systems EA mapping configuration supports only synchronization elements having Archimate® 2.0 stereotypes. Both Archimate® 1.0 and 2.0 stereotypes are available in Sparx Systems EA. Make sure you choose the correct Archimate® stereotypes in your architecture.

Uninstalling Extension for Sparx Systems EA

Before you install a new version of the Cloud Assessment Extension Sparx Systems EA, it is helpful to uninstall any existing version on your system.

To uninstall follow the steps mentioned below:

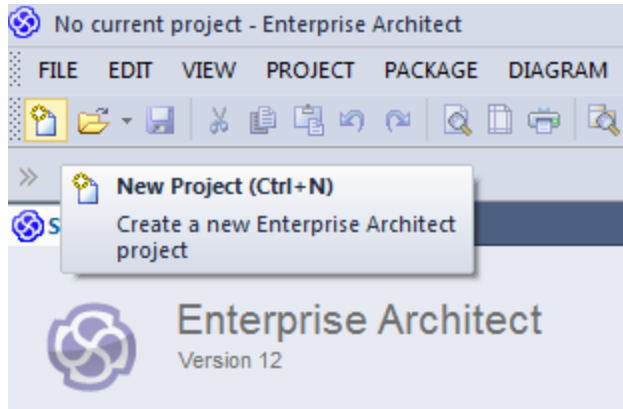
1. Close Sparx Systems EA if it is running.
2. Open the **Control Panel > Programs > Programs and Features**.
3. Select the program from the list, and then click **Uninstall**.



Connecting Extension for Sparx Systems EA to Cloud Assessment

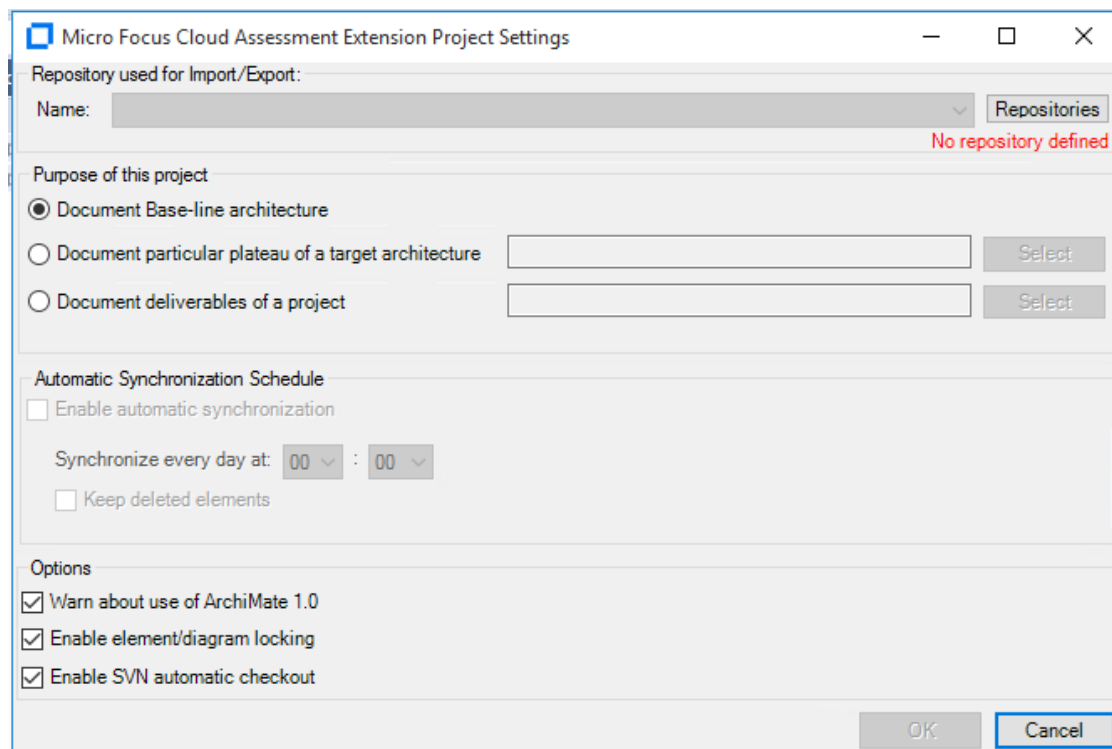
Once the installation for Cloud Assessment Extension for Sparx Systems EA is complete, you can connect to Cloud Assessment in the following manner :

1. Create or open a project in Sparx Systems EA.



2. From the main menu, click **Extensions > Micro Focus Cloud Assessment > Settings**.

The Micro Focus Cloud Assessment Extension Project Settings window appears as below.



3. Click the Repositories button to define a repository. The Create new Repository window appears as below.

Create new Repository

Server Information

Enter Micro Focus Cloud Assessment Base URL, username and password.

If you are using Micro Focus Cloud Assessment virtual appliance, use the URL `http://127.0.0.1/cloudassessment`. The default admin password is 'changeit'

Micro Focus Cloud Assessment Base URL

Username

Password

4. Enter Micro Focus Cloud Assessment URL with the credentials and click **Next**. A list of the available Sparx EA repositories on the Cloud Assessment server is generated. Select a repository in the domain where you would like Sparx EA to be synchronized, and click **Finish**.

Create new Repository

Server Information

Enter Micro Focus Cloud Assessment Base URL, username and password.

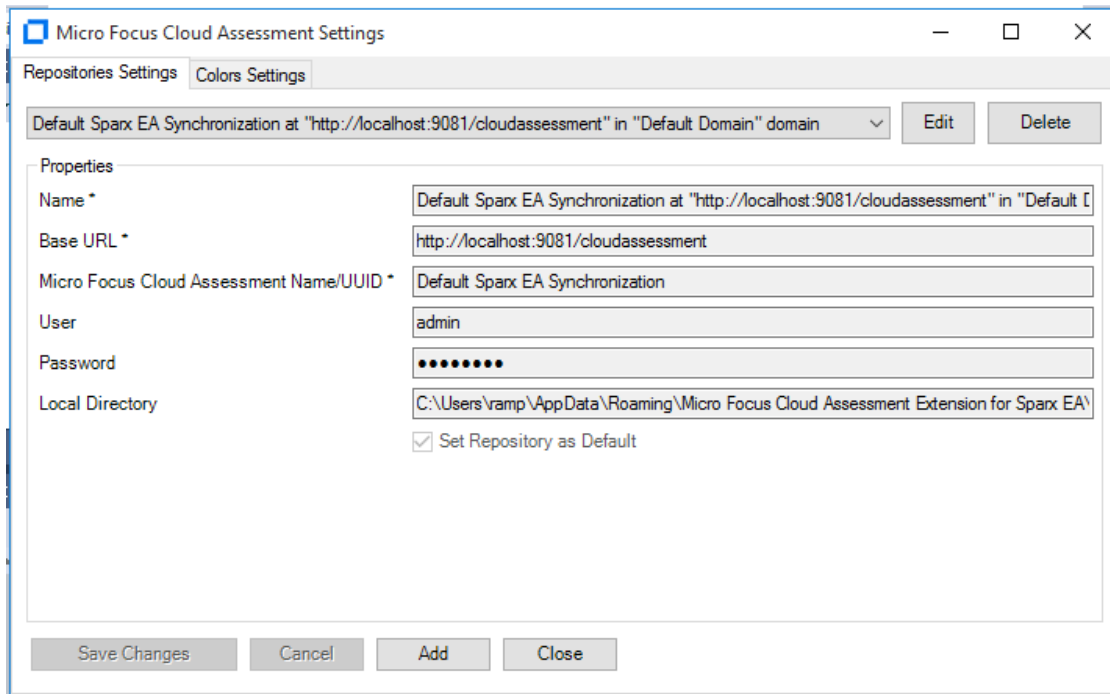
If you are using Micro Focus Cloud Assessment virtual appliance, use the URL `http://127.0.0.1/cloudassessment`. The default admin password is 'changeit'

Micro Focus Cloud Assessment Base URL

Username

Password

5. The newly added repository is automatically set as the default repository for all the import, export and synchronization actions.



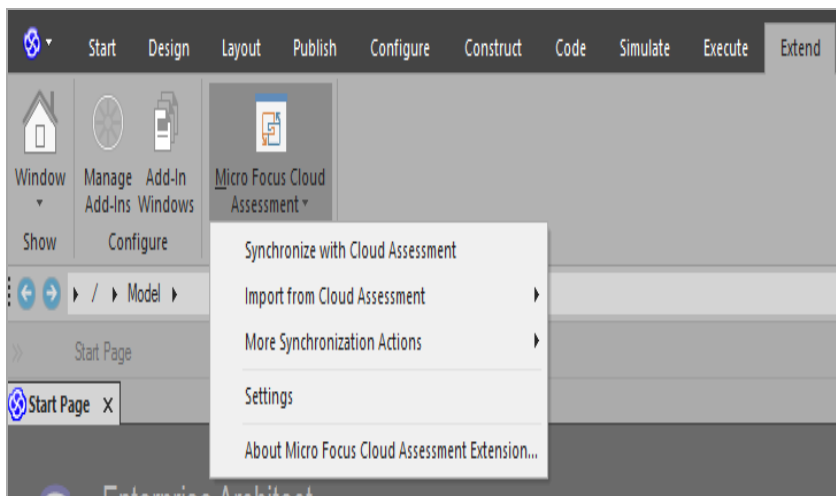
Click **Close** to exit Settings window.

Synchronize Data Between SparX Systems EA and Cloud Assessment

Cloud Assessment SparX add-in supports synchronization of data between SparX project and Cloud Assessment repository server. The following are the functions to synchronize data:

1. Synchronize with Cloud Assessment

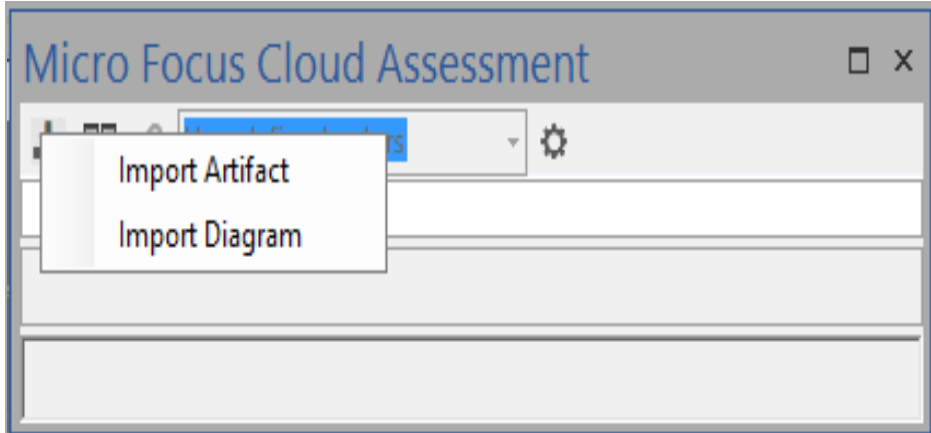
This function exports all the changes from SparX project to Cloud Assessment and also imports the changes of existing elements on SparX project from Cloud Assessment.



NOTE:
This function does not import new artifacts in Cloud Assessment.

2. Import from Cloud Assessment

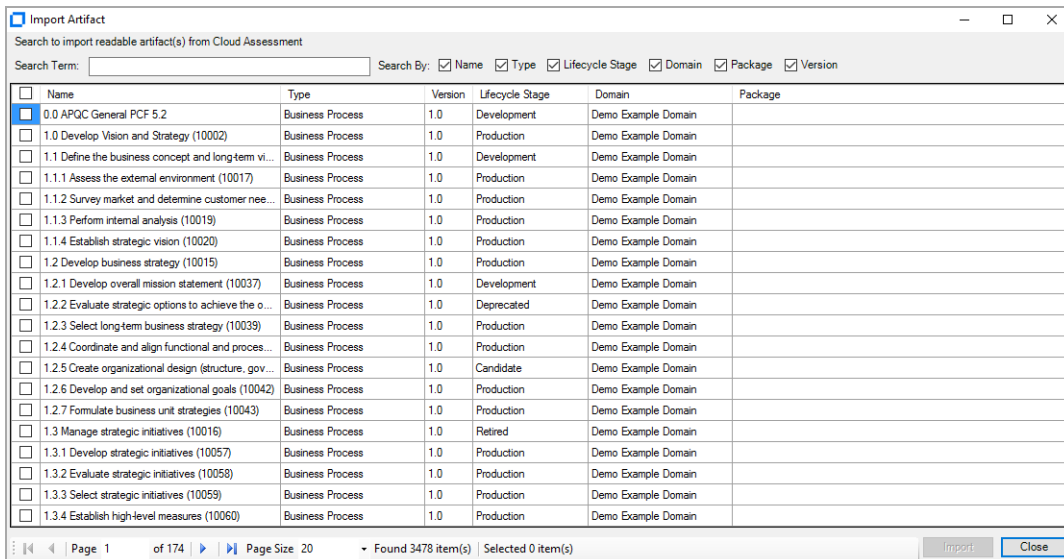
This function allows you to import selective individual artifact from Cloud Assessment to SparX Project.



a. Import Diagram - imports the selected diagram and all its artifacts to SparX project.

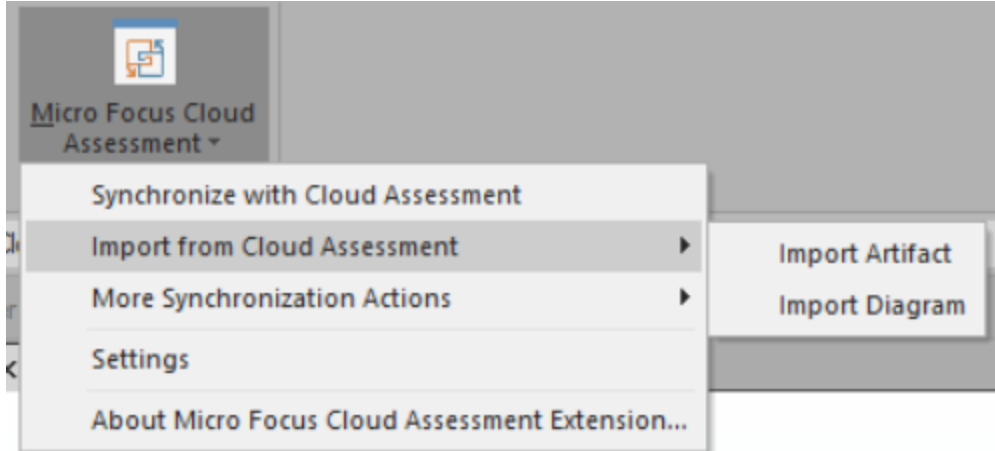
NOTE:
You must ensure to configure the repository to import the selected diagram and its artifacts.

b. Import Artifact - searches the artifacts directly from Cloud Assessment and then imports the selected artifact to SparX project.



You can search the available artifacts by Name, Version, Lifecycle Stage, Artifact Type, Artifact Domain and Package. Use the Page Size to specify the number of artifacts to be displayed in a single page for a search result. You can then use the pagination buttons at the bottom of the window to navigate through the pages of search result.

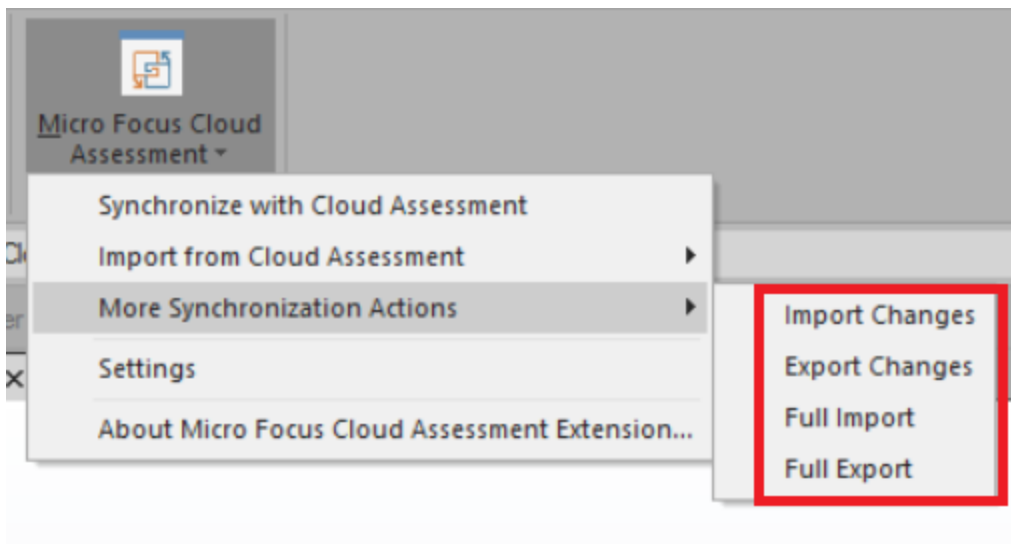
You can also import your diagrams and artifacts from Cloud Assessment add-in window.



To enable the Cloud Assessment add-in window, check the **Add-In Windows** option from the **EXTENSIONS (EXTENSIONS > Add-In Windows)**.

3. More Synchronization Actions

This function allows you to export/import only the changed artifacts or full export/import of the artifacts.



The following are the options:

- a. Import Changes - imports all the changes of existing artifacts in SparX Project from Cloud Assessment repository (excludes new artifacts from Cloud Assessment).
 - b. Export Changes - exports all the changes from SparX Project to Cloud Assessment repository (includes new elements in SparX Project).
 - c. Full Import - imports all shared artifacts from Cloud Assessment repository to SparX Project.
 - d. Full Export - exports all elements on SparX Project to Cloud Assessment repository.
- ### 4. Automatic Synchronization Schedule

Cloud Assessment SparX add-in allows you to schedule the synchronization with Cloud Assessment repository. Each time the scheduler is run, all the changes in Cloud Assessment repository and SparX project are synchronized. For more information, see [Scheduling Automatic Synchronization, below](#).

Scheduling Automatic Synchronization

You can configure a Sparx EA project to synchronize with Cloud Assessment on daily basis at a fixed time. To enable automatic synchronization, configure a Cloud Assessment repository and then set the Automatic Synchronization Schedule as represented below.

Micro Focus Cloud Assessment Extension Project Settings

Repository used for Import/Export:

Name: Repositories

No repository defined

Purpose of this project

Document Base-line architecture

Document particular plateau of a target architecture Select

Document deliverables of a project Select

Automatic Synchronization Schedule

Enable automatic synchronization

Synchronize every day at: 00 : 00

Keep deleted elements

Options

Warn about use of ArchiMate 1.0

Enable element/diagram locking

Enable SVN automatic checkout

OK Cancel

Once the synchronization is over, a log file is created in the following path `%AppData%\Micro Focus Cloud Assessment Extensions for Sparx EA\log` (prefixed with 'autosync').

NOTE:

For automatic synchronization to work, the Sparx EA project must be open at the scheduled time and user intervention must be avoided.

NOTE:

Cloud Assessment SparX add-in allows you to enable/disable SVN automatic checkout in setting window.

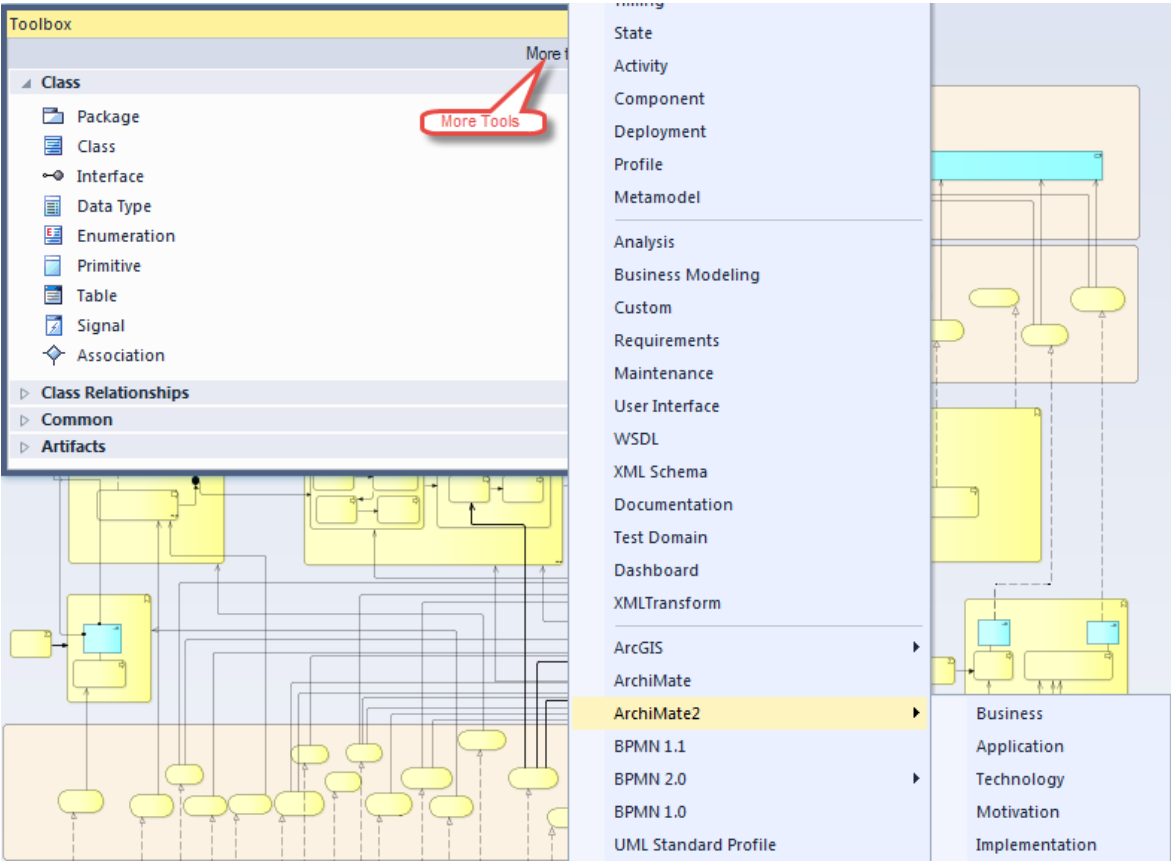
Basic Modeling with Sparx Systems EA

When building data models in Cloud Assessment, Sparx Systems EA users can access Archimate 2.0 elements using the following steps:

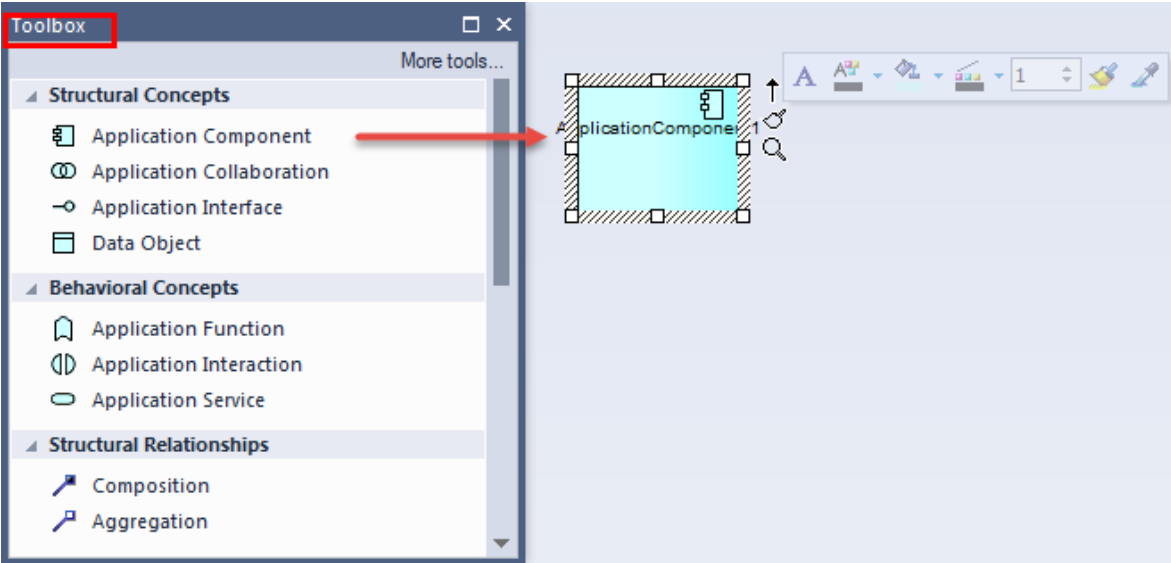
1. In the main menu click **Diagram > Toolbox** to display the diagram toolbox.



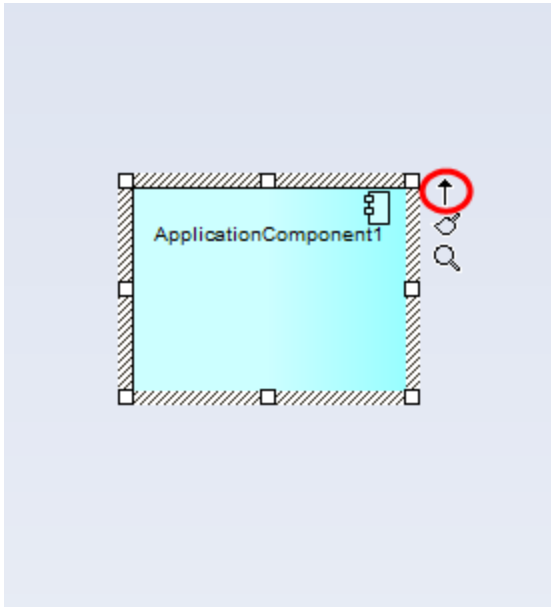
2. To display elements of Archimate 2.0 layer click **More tools**, and then select the layer for your model.



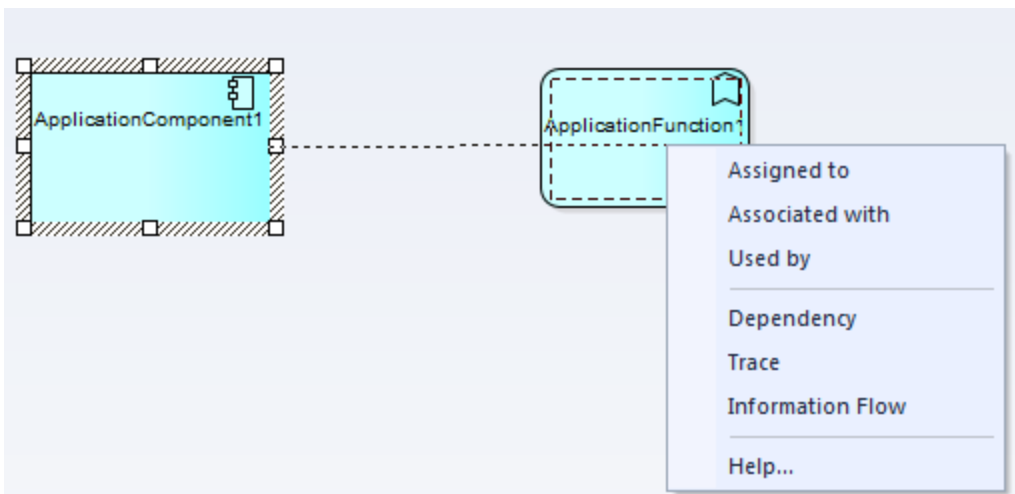
3. You can create new elements by dragging them from the Toolbox to a working diagram.



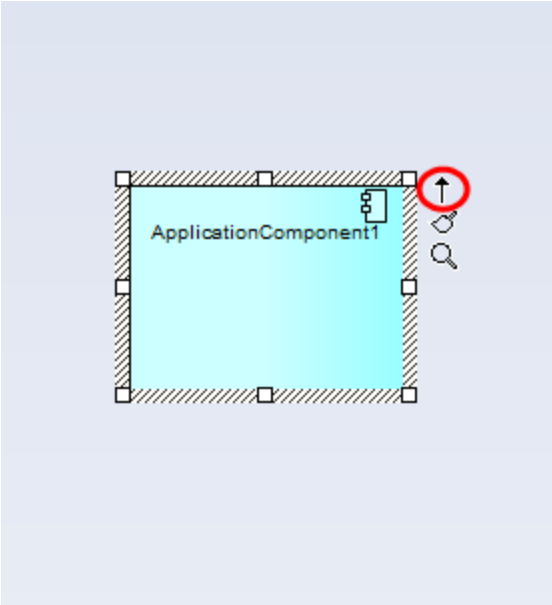
4. In a working diagram, you can create a link between elements by dragging the arrow (quick linker) from a selected element to another element.



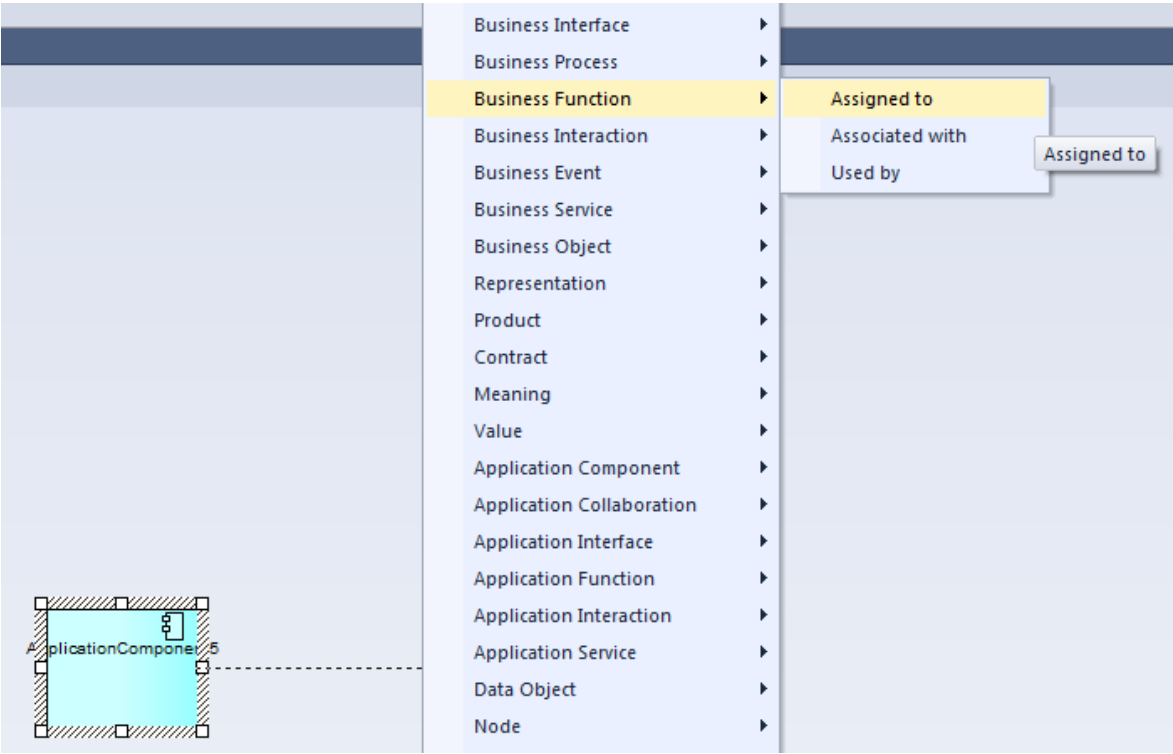
5. After linking elements, Sparx Systems EA will ask for a link type. Define the relationship between elements using the link type menu.



6. You can create a new element together with a link by dragging the arrow from a selected element to an empty area of your diagram.



7. Sparx Systems EA prompts you for a target element type and link type after you stop dragging the arrow.



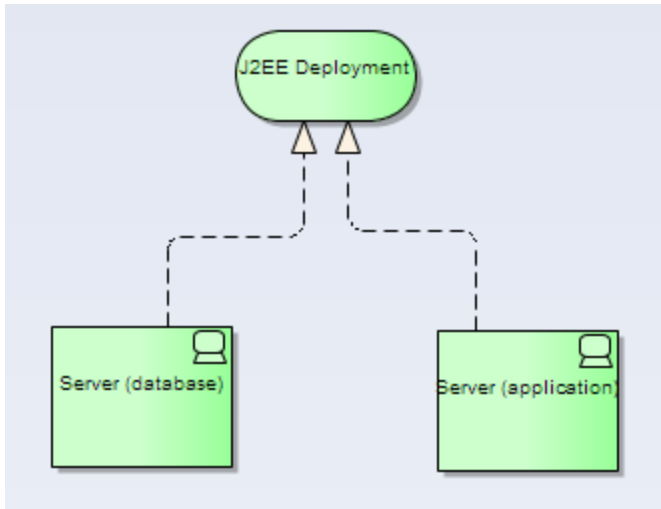
8. Sparx Systems EA opens a dialog that allows you to specify element properties. After you click **OK**, the element is created along with the link.

Building Reference Model for Cloud Transformation

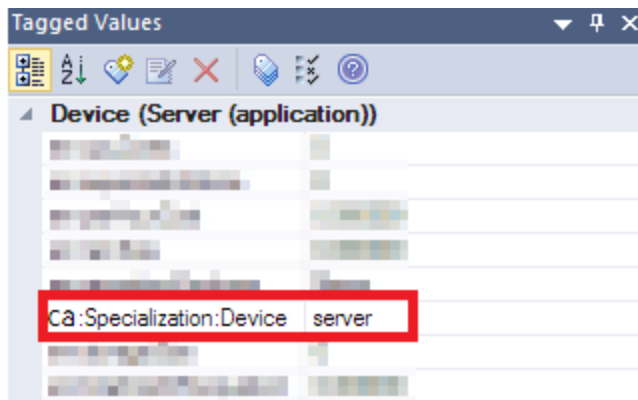
Reference model (or deployment model) in Cloud Assessment represents the required infrastructure of an application to be deployed on to different platforms. A reference model can be abstract and suitable for any platform, or can be specific to a particular platform (for example: Cloud). A reference model can also be further fine-tuned to a specific Cloud such as MS Azure and Amazon AWS.

To build a reference model follow the steps mentioned below:

1. Create an Infrastructure Service and link the required Devices using *Realizes* relationship.



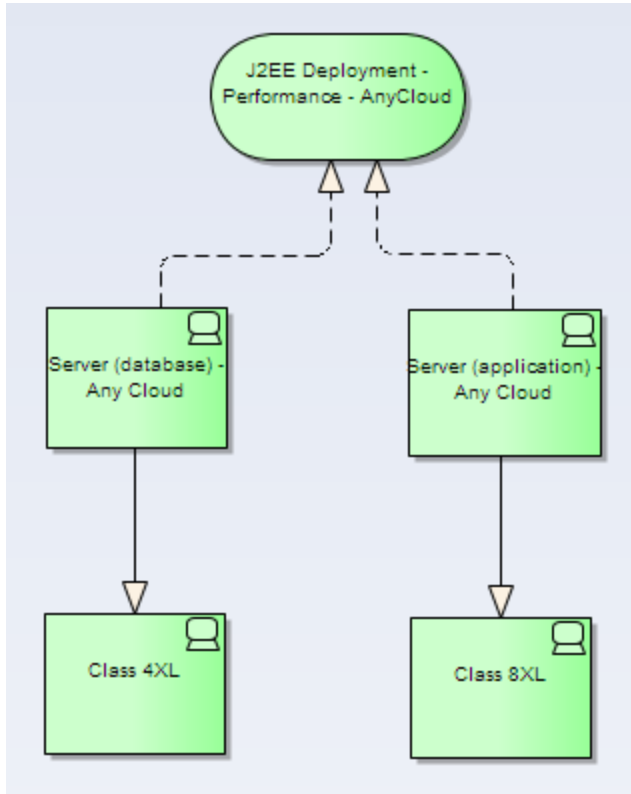
2. In **Tagged Values** window of Device, select **server** in the Specialization field for all Devices. This synchronizes the Devices as Servers into Cloud Assessment.



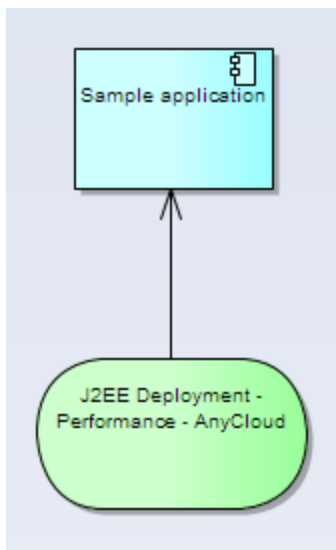
3. Additionally, define preferred Server Class(es) for each Server in the reference model using *Specializes* relationship.

NOTE:

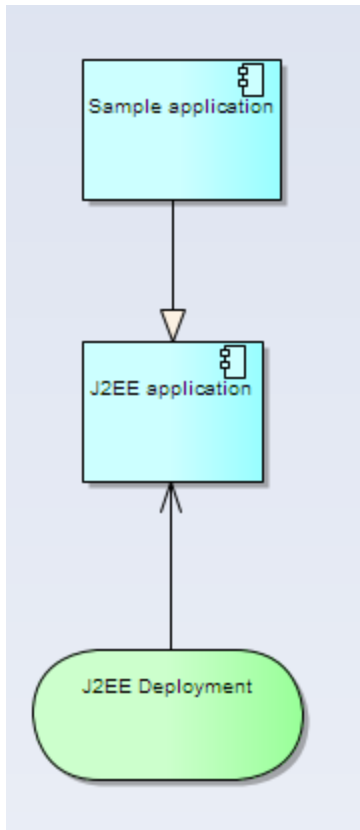
- You can also define Server Class required by the application later in its overview page in Cloud Assessment.
- Server Classes already available in Cloud Assessment can be imported from Cloud Assessment.



4. Define usage of this reference model by the application component linking through *Uses* relationship.



Or, making the application component *Specializes* another application that *Uses* this reference model.



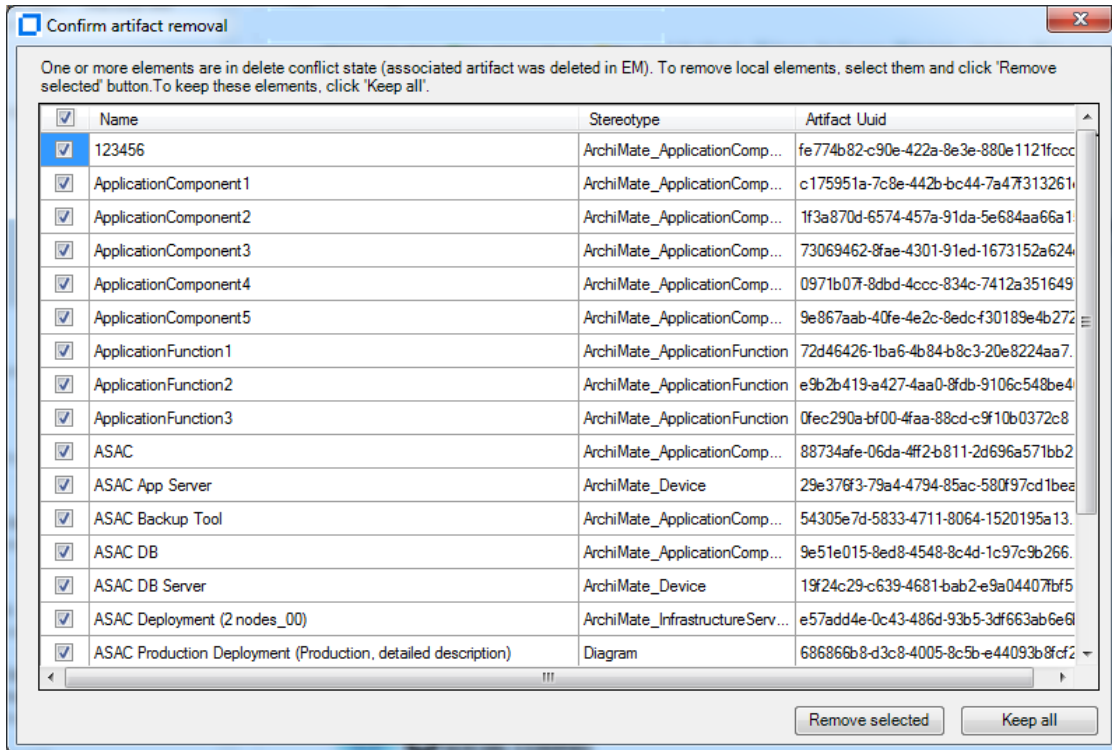
5. Export these reference models to Cloud Assessment.

Synchronizing Deleted Artifacts

Over a period of time, administrators might delete some of the artifacts in Cloud Assessment. The problem arises, when a Sparx EA project containing deleted artifacts is synchronized with Cloud Assessment. The synchronization can detect this inconsistency and show the below message prompting the user to take action on deleted artifacts.

1. Artifact(s) that is/are deleted in Cloud Assessment but existing in SparX Project.

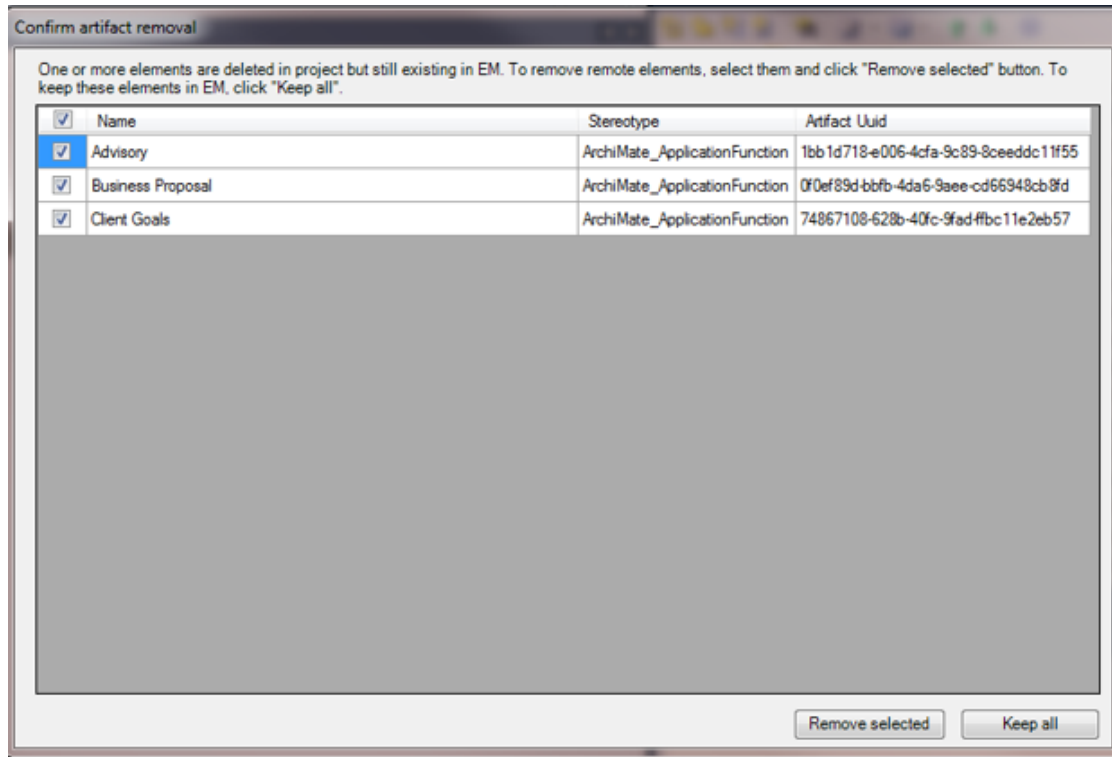
The following **Confirm Artifact removal** window shows a list of artifacts that were deleted in Cloud Assessment but are existing in SparX project.



The following options are available for the user:

- **Remove Selected:** removes artifacts from Sparx EA project also.
 - **Keep All:** keep artifacts in Sparx EA project and restore them in Cloud Assessment.
2. Artifact(s) that is/are existing in Cloud Assessment but deleted in SparX Project.

The following **Confirm artifact removal** window shows a list of artifacts that were deleted in SparX Project but are existing in Cloud Assessment.



The following options are available for the user:

- **Remove Selected:** removes artifacts in Cloud Assessment also.
- **Keep All:** keep artifacts in Cloud Assessment.

Element/Diagram Locking

Cloud Assessment Extension for Sparx Systems EA provides a locking mechanism to assist Sparx EA users who work concurrently on the same elements/diagrams, either within Sparx EA or Cloud Assessment.

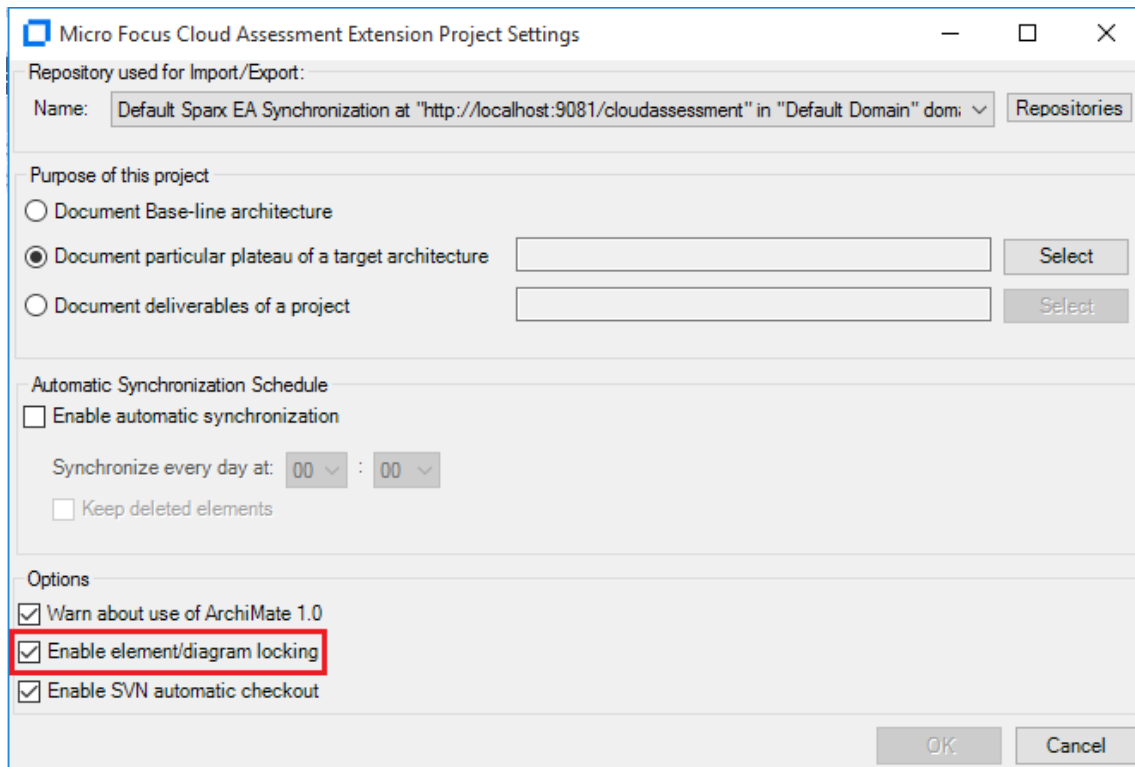
Locking does cause certain intermittent interruptions for the user. However, the benefit is far more utilitarian, in terms of protecting data integrity.

Prerequisites

In order to take advantage of the locking, please ensure the following:

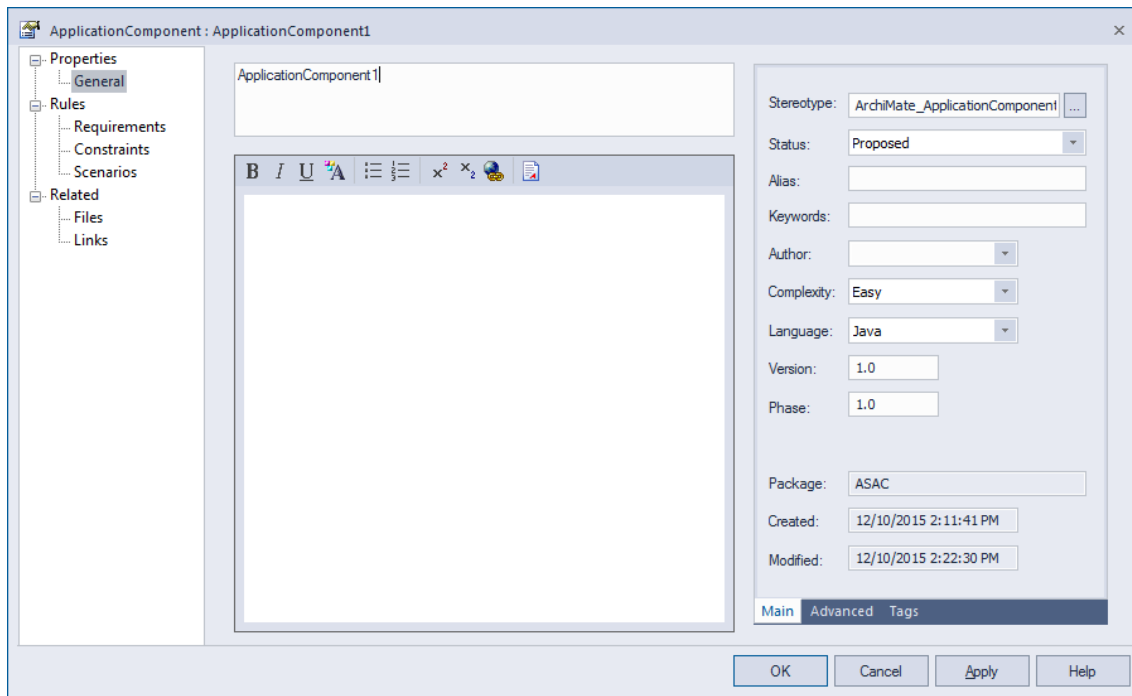
- Locking must be enabled in project settings.
- Elements, diagrams or the entire project must be synced to the same Cloud Assessment server,

using the same Sparx EA repository.

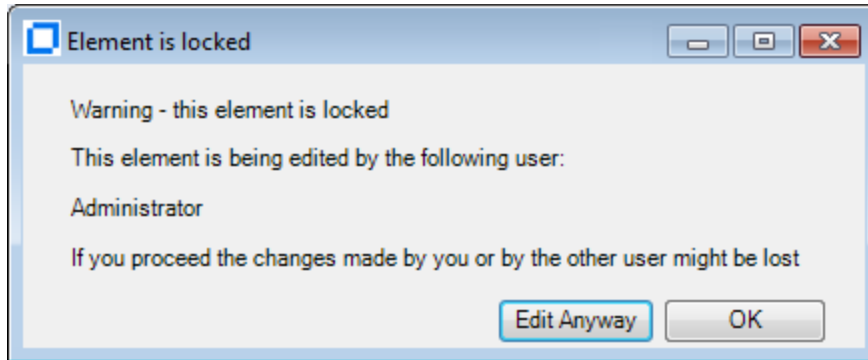


How it works

- When you open a diagram or edit an element using properties window or project browser, the lock is triggered for that particular element/diagram.



- You can then release the lock after you complete your work by syncing the edited element/diagram to Cloud Assessment again. This propagates the changes made by you and allows other users to begin their work on the same element/diagram.
- In case the edited element/diagram is not synced with Cloud Assessment, other users receive the below warning message when they attempt to open the diagram or while they edit the element during the locking period.



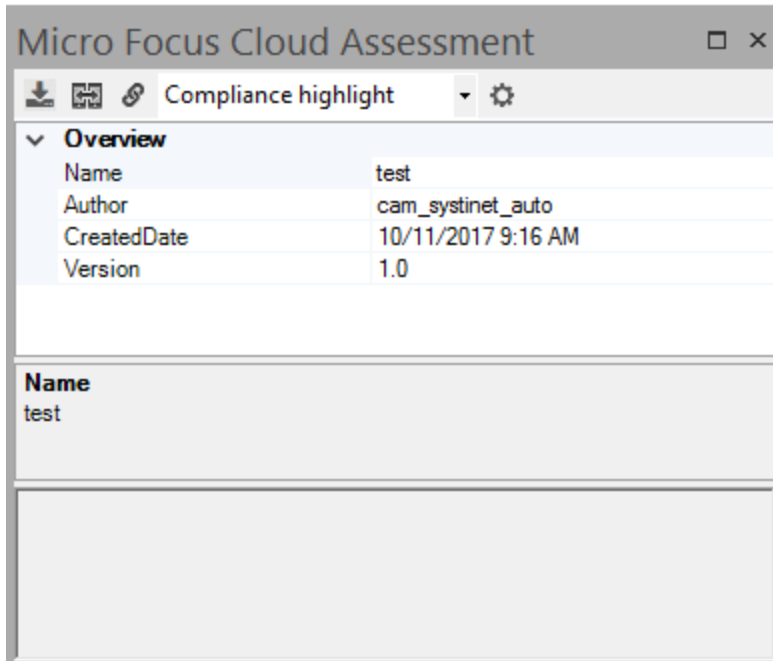
- If you choose **Edit Anyway**, the changes for this element/diagram become indeterminable. The last user, who syncs the changes with Cloud Assessment, overwrites the changes done by previous users.
 - If you click **OK**, you are unable to edit the element/diagram until the lock is released. However, data integrity is assured.
- The lock is auto released after a lapse of 30 minutes, if there is no further editing from the user who triggered the lock. The other users can then start their work on the same element/diagram.

Diagram Synchronization

Cloud Assessment Extension for Sparx Systems EA uses different techniques to detect the changes made to a diagram. During the synchronization between Cloud Assessment and Sparx EA, only that diagram is synced with Cloud Assessment. However, there are some unsupported cases when the extension cannot detect the changes made to a diagrams. In such cases, ensure to sync the modified diagrams manually.

The following are the unsupported cases:

1. **Policy compliance update**: a diagram is not treated as modified when you update the compliance status of an artifact belonging to that diagram.



2. **Changes that do not trigger the unsaved state of a diagram:** any changes on the diagram that do not turn it into the unsaved state (see image below). For example, editing a note or modifying an element properties are not considered as modified diagram.

