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CA Technologies Product References

This document references the following CA Technologies products:

- CA Technologies Unicenter® Asset Portfolio Management

Contact CA Technologies

Contact CA Support

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

Chapter 2: Setup and Installation

Chapter 3: Import Asset Data into CA Clarity PPM

Appendix A: Field Mappings
Chapter 1: CA Clarity PPM Connector for CA Technologies Unicenter APM Overview

This section contains the following topics:

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

About CA Clarity PPM Connector for CA Technologies Unicenter APM

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

You can import asset data from CA Technologies Unicenter APM into CA Clarity PPM using the CA Clarity PPM Connector for CA Technologies Unicenter APM add-in. This integration allows you to manage the total cost of ownership of investments, services, and portfolios. Assets remain centrally managed while detailed financial information is integrated into the existing CA Clarity PPM views through cost plans.
Chapter 2: Setup and Installation

This section contains the following topics:

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

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

The following steps describe the overall process of setting up the CA Clarity PPM Connector for CA Technologies Unicenter APM add-in:

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

Install the CA Technologies Unicenter APM Software Patches

Install the following CA Technologies Unicenter APM software patches:

- T 485051
  Allows Unicenter APM to work with CA Clarity PPM.
- T 333100
  Contains the instructions for the software patch.

**Note:** CA Technologies Unicenter APM expertise is required to install the patches. Contact CA Technologies Unicenter APM technical support for assistance.
Install the CA Clarity PPM Connector for CA Technologies Unicenter APM Add-in

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

Installation Prerequisites

CA Clarity PPM Release 13.1 is validated to work with CA Technologies Unicenter APM r11.3.4 GA. Before installing the add-in, read the following requirements for new and existing customers:

- New CA Clarity PPM customers - Install CA Clarity PPM Release 13.1 before installing the add-in.
- Existing CA Clarity PPM customers - Install or upgrade to CA Clarity PPM Release 13.1 before downloading and installing the add-in.

How to Install Add-Ins

This section describes the steps required to install add-ins from a .jar file so that the content is available to users. Complete the steps on your CA Clarity application server. Before installing an add-in, verify that the relevant CA Clarity PPM version is installed.

**Important!** If you upgrade from a previous version of the add-in, verify the compatibility chart in the add-in release notes to see if an upgrade for the add-in is required, or is optional.

The following process details how to install add-ins on your CA Clarity PPM server:

1. **Download the .iso image file** (see page 11).
2. **Extract the .jar file** (see page 12).
3. **Stop the services** (see page 12).
4. **Install the add-in** (see page 13).
5. **Start the services** (see page 14).
6. **Apply the add-in** (see page 15).

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

**Download the .iso Image File**

All add-ins are .iso image files. The .iso image file includes a .jar file. The .jar file contains the files to install the add-in. The installer updates the existing CA Clarity PPM installation with the newly downloaded files.

To download the .iso image file, go to support.ca.com and download the .iso image to your computer, or an accessible network location.

**Mount .iso Image Files Using Unix**

On UNIX platforms, use the .iso image file directly through the DVD emulation provided with some of the operating environment DVD device drivers. For Linux systems, you can use the .iso image by mounting it on the .iso file system driver.

To mount the .iso image file using Unix, open a command prompt and issue a command similar to the following:

```
mount -t .iso9660 -o ro,loop,dev filename.iso /mnt/CAcd
```

The command mounts the .iso image file (filename.iso) at the /mnt/CAcd mount point. Hence, the DVD contents are accessible through the /mnt/CAcd directory.

**Write .iso Image Files to DVDs**

The .iso image files are DVD images containing exact binary copies of the original DVDs. Depending on the operating environment, you can use the files to create product DVDs, or you can use them in their original format.

A DVD writer and mastering software are required to recreate product DVDs. Most DVD authoring applications accept a preformatted .iso image file and write the contents of the ISO image to a DVD. This step generates an exact copy of the product DVD.

See the documentation on your DVD writer for more information about how to write .iso image files to DVDs.

**Note:** Neither Windows nor WinZip recognizes the .iso file format. To access the installation files in Windows, create a DVD with the .iso image file using a DVD Writer. Or, use a third-party software program like IsoBuster or Undisker as an .iso image file extractor. If you prefer not to create a DVD, use an .iso extractor program to extract .iso image files to a local file system.
**Extract the .jar File**

Once you access the .iso image file, extract the .jar file to a temporary directory location on the CA Clarity application server to complete the installation process.

The .jar file includes the following files:

- **install.sh**
  - The UNIX installation script.

- **install.bat**
  - The Windows installation script.

- **install.xml**
  - The Ant installation script.

- **package**
  - The directory of updated files.

- **tools**
  - The directory of supporting files.

**Follow these steps:**

1. Open a command prompt, and issue the following command:
   ```
   jar -xvf <filename>
   ```
   The command extracts the contents of the .jar file to the same location where the .jar file resides.

2. For a UNIX environment, issue the following command:
   ```
   chmod +x install.sh
   ```
   This grants execution privileges for the install script.

**Stop the Services**

Before applying the add-ins, stop the CA Clarity Application (app) and CA Clarity Background (bg) services. Restart them from Clarity System Administration after having applied the add-in to CA Clarity PPM.

The following sections explain how to stop the services in different server configurations.

**Important!** If deployed on the server, do not stop the Clarity System Administration (nsa), the Database (db), the Beacon, and the Reports (reports) services.
Stop Services Using Apache Tomcat

Do the following to stop the CA Clarity Application (app) service and CA Clarity Background (bg) services that use Apache Tomcat as your CA Clarity application server.

Follow these steps:
1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app) and the CA Clarity Background (bg) service check boxes.
4. Click Stop.

Stop Services Using Oracle WebLogic/IBM WebSphere

Do the following to stop the application and background services in a configuration that uses the Oracle WebLogic, or IBM WebSphere as your CA Clarity application server.

Follow these steps:
1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app), and the CA Clarity Background (bg) check boxes.
4. Click Stop.
5. Stop CA Clarity System Administration and applications using the application server administration console.
   For more information, see the J2EE vendor documentation.

Install the Add-In

The following procedure installs the updates to objects, reports, and the database.

Important! Back up your CA Clarity PPM installation before installing this add-in so that you can restore the application to the prior version, if necessary. When you install an add-in, you can overwrite your customized views for out-of-the-box CA Clarity PPM objects, such as projects. If your organization has customized views, consider installing in a test environment before installing this add-in into your production environment. Once you have installed the add-in, you cannot uninstall it.

Follow these steps:
1. Open a Command Prompt window at the directory location where you extracted the .jar files, and issue the following command:
   ```plaintext
   install
   ```
Install the CA Clarity PPM Connector for CA Technologies Unicenter APM Add-in

2. Press Enter.
   The installation process begins.

3. Follow the on-screen directions to complete the add-in installation.

Start the Services

Stop the CA Clarity Application (app) and CA Clarity Background (bg) services before applying the add-in. Restart them after applying the add-in. Use CA Clarity System Administration to stop the application.

The following sections explain how to start the services in different server configurations.

Start Services Using Apache Tomcat (Single Server)

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses the Apache Tomcat as your CA Clarity application server. Also, all the services require to run on a single server.

Follow these steps:
1. Log in to CA Clarity System Administration.
2. Open Home, and click All Services.
3. Select the CA Clarity Application (app) and the CA Clarity Background (bg) service check boxes.
4. Click Start.

Start Services Using Apache Tomcat (Multiple Servers)

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses Apache Tomcat as your CA Clarity application server. All the services require distributing across multiple servers.

Follow these steps:
1. Log in to CA Clarity System Administration.
2. Open Home and click All Services.
3. Turn off any remote app and bg services.
4. Open the Distribution menu, and click Distribute All.
5. Select remote servers and click Distribute. Wait until the distribution is complete.
6. Open Home, and click All Services.
7. Select the CA Clarity Application (app) and CA Clarity Background (bg) service check boxes, and click Start.
Start Services Using Oracle WebLogic/IBM WebSphere

Do the following to start the CA Clarity Application (app) and CA Clarity Background (bg) services. The configuration of the services uses Oracle WebLogic, or IBM WebSphere as your CA Clarity application server.

Follow these steps:

1. Log in to CA Clarity System Administration.
2. Open the Installation menu, and click Install and Upgrade.
   The install and upgrade database page appears.
3. Click Package Application Ear.
4. Click Create Package.
   The application creates a package and the niku.ear.
5. Deploy the (niku.ear) package using the J2EE application server administration console.

Apply the Add-In

You can review changes to installed add-in items and review add-in updates using the details page for an add-in. The details page is available from the add-in page in Studio. If you have configured views when you install the add-in, the configurations remain and are not overwritten. You can decide which views to apply. If you are upgrading to the current add-in version, use the page to select new or modified items and apply them. Applying a view overwrites the configuration of the view.

Note: When you apply content from the add-in page, the access rights of your CA Clarity PPM system administrator user (admin) are used to install the content. Before using the add-in page to install content, grant or verify that the admin user has the appropriate Edit access rights for the type of content you are applying. For example, if you are applying project-based portlets, verify that the admin user has the Project - Edit Management – All access right.

This page lists all of the items that are included with the add-in. The following columns display on the page:

Status

Indicates if the add-in item is applied or not in CA Clarity PPM.

Values:

- Not Installed. New items that are new to the add-in version or that you did not apply from a previous add-in version.
- Upgrade Ready. Modified items that you applied from a previous add-in version and then configured. An update to the item is included in the current add-in version.
Install the CA Clarity PPM Connector for CA Technologies Unicenter APM Add-in

**Important!** Consider the configurations that you have made to items before applying them. Applying modified items overwrites your configurations.

- Installed. Items that are installed.

**Type**
Indicates the item type.

**Values:** Object, Lookup, Tab, Query, Portlet, Page, Custom View, Group, Menu, Project, Process, Role, and Report/Job

**ID**
Displays the add-in item code, which is the identifier of the applied add-in item.

**Follow these steps:**

1. Log in to CA Clarity PPM.
2. Open Administration, and from Studio, click Add-ins.
   
   The add-ins page appears.
3. Click the name of the add-in to apply items.
   
   The details page for the add-in appears.
4. Review the items in the list and select for applying.

   **Note:** By default, when you upgrade to the current add-in version, the items that are new or modified are selected.
5. (Upgrade Only) For all active process instances with the "Upgrade Ready" status, cancel and delete the process instance.
   
   Contact your CA Clarity PPM administrator or see the *Administration Guide* for more information.
6. Click Apply.

   **Note:** If a selected item has dependencies on other items, the dependencies are also updated.

   A list of updated items displays on the confirmation or install page.
7. Click Yes.

   If a user has previously changed an item listed on the confirmation or install page, publish the item before displaying the update to the users.

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

Activate the following charge codes after add-in installation:

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

**Follow these steps:**
1. Log in to CA Clarity PPM.
2. Open Administration, and click Charge Codes.
   The Charge Codes window opens.
3. Select No for Open for Time Entry.
4. Select the Charge Codes and click Open.
   The charge codes are activated.

Verify Import Unicenter APM Assets Process

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

See the *Administration Guide*, for more information.

**Follow these steps:**
1. Open Administration, and from Data Administration, click Processes.
2. Verify if the Import UAPM Assets process is listed.
Custom Scripts to Import Asset Data

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

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

Follow these steps:
1. Open Administration, and from Data Administration, click Processes.
2. Click the Import Unicenter APM Assets process to open it.
3. Click Steps from the content menu.
4. Click Asset Properties Import in the Group > Steps column.
5. In the Actions section, click Perform Asset Import.
6. Click Custom Script Parameters from the content menu.
7. Complete the following fields:
   - **XOG_Username**: Defines the CA Clarity PPM user name for invoking the XOG web service for creating cost plans.
   - **XOG_Password**: Defines the CA Clarity PPM password for the XOG user.
   - **UAPM_UserName**: Defines the user name used to gain access to Unicenter APM.
   - **UAPM_Password**: Defines the password used to gain access to Unicenter APM.
   - **UAPM_Web_Service_URL**: Defines the URL where Unicenter APM can be located on the web.
   - **UAPM_AssetId**: Enter a Unicenter APM asset ID if you are importing data on a specific Unicenter APM asset.
   - **UAPM_AssetType, UAPM_AssetClass, UAPM_AssetSubClass, UAPM_AssetKeyword, UAPM_AssetCostType, UAPM_AssetStatus**: Defines the refined search attributes for Unicenter APM asset data to import into CA Clarity PPM. If no filter value is entered for the field, enter an asterisk in the field.
   - **Clarity_Manager_User_Name**
Defines the name of the financial manager for the cost plan. If costs are being imported from Unicenter APM, the cost plan uses the information. When the asset is imported into CA Clarity PPM, the Manager attribute is set to this login ID.

**Clarity_Status**

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

**Threshold.Import_Date**

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

**Do_Full_Import**

Defines whether to import asset data fully or partially.

**Values:**

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

**Clarity_Entity**

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

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

8. Save your changes.
Define Selection Criteria for Filtering Unicenter APM Assets

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

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

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

- CA Clarity PPM manager ID (Clarity_Manager_User_Name)
- CA Clarity PPM status (Clarity_Status). **Default:** "Approved"
- CA Clarity PPM entity (required when importing cost data)
Chapter 3: Import Asset Data into CA Clarity PPM

This section contains the following topics:

- Import Asset Data (see page 21)
- Import Asset Cost Data (see page 22)
- Delete Assets from Unicenter APM and CA Clarity PPM (see page 26)

Import Asset Data

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

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

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

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

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

- **Begin Date**
  - Defines the initial date the cost is incurred.

- **Total Amount**
  - Defines the cost that is applied at every recurring period.

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

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

  **Note:** Days are not supported as a recurring unit.

- **Termination Date**
  - Defines the date the recurring charges stop.

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

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

- Lease
- Support
- Maintenance
- License Fee

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

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

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

Cost Plans

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

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

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

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

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

Deleting Cost Records

You cannot delete Unicenter APM cost records from CA Clarity PPM. When you delete a cost record in Unicenter APM, delete manually the corresponding cost plan in CA Clarity PPM.
Fiscal Time Periods for Imported Cost Data

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

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

For example:

Begin Date = 1/1/11
Termination Date = 12/31/14
Unicenter APM Quantity = 10
Recurring Period = 1 per Month
Total Amount = $100
Number of Periods = 12

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

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

Begin Date=1/1/11
Termination Date=12/31/14
Unicenter APM Quantity=1
Recurring Period= 1 per Year
Total Amount=$10000
Number of Periods=4

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

- 1/12
- 1/13
- 1/14
Delete Assets from Unicenter APM and CA Clarity PPM

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

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

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

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

See the Studio Developer’s Guide for more information.

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

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