

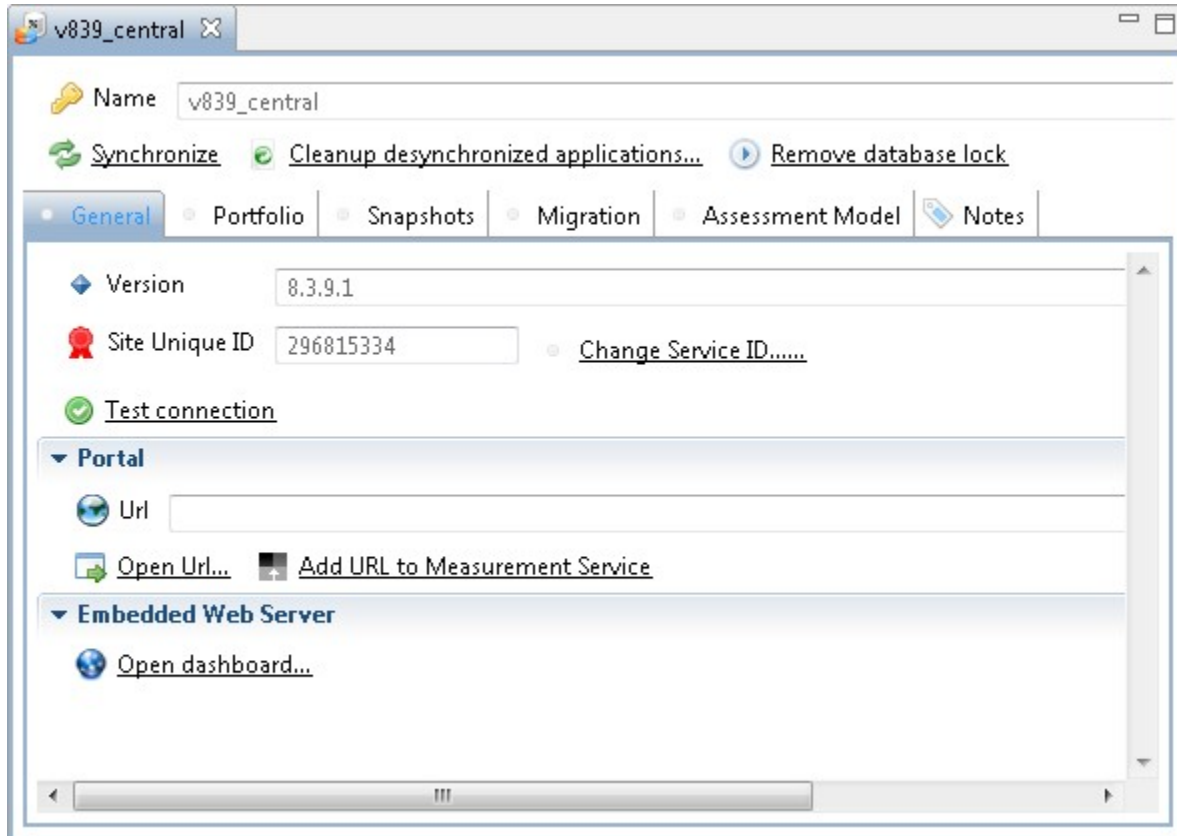
# CMS - Dashboard Service editor

## Dashboard Service editor

This section provides a detailed description of the **Dashboard Service editor**. This editor provides a means for you to configure a **Dashboard Service** installed on your [Database server](#).

### Notes





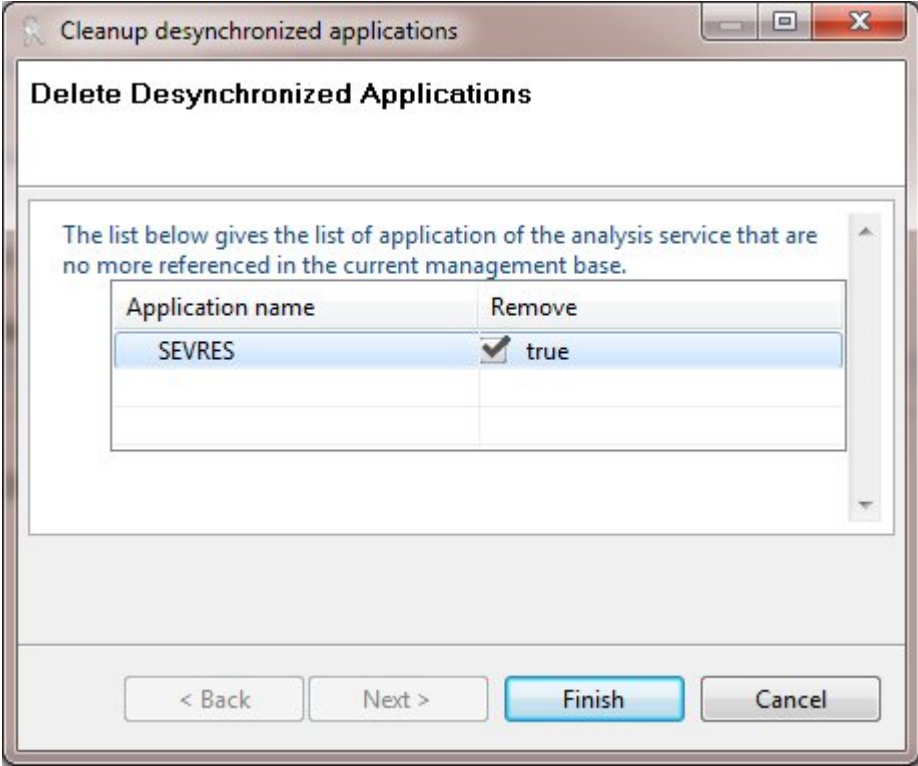


- Note that a Dashboard Service is used to store **Snapshots** generated from analysis results and **Assessment Models** used for managing Metrics and Quality Rules.
- Dashboard Services are automatically defined using the [Discover](#) option following the [addition of a database server](#)
- The user name and password used to access the Dashboard Service will be the same as used in the parent [Database server](#), although they can be overridden using the **Credentials** section below. Please see [CAST Management Studio - Rights](#) for more information about how server access rights and permissions are handled in the CAST Management Studio.





### Main field headings

This table lists the field headings that are always visible:


	Name	
-		Displays the <b>name</b> of your service. Because the service has been "discovered" either: <ul style="list-style-type: none"><li>• from the information automatically defined during the installation process using the CAST Server Manager "Combined" option - see the <b>CAST Installation Guide</b> for more information</li><li>• or via the <a href="#">Discover</a> option when a new <a href="#">Database server</a> is added via the <a href="#">Services view</a></li></ul> ...the name will be identical to the name of the corresponding database on your <a href="#">Database server</a> . <b>It is NOT possible to modify the name of a service.</b>

-	<b>Credentials</b>	<p>This option enables you to override the username and password defined in the <a href="#">Database server editor</a> for the service's parent server. In other words, if the username and password used in the <a href="#">Database server editor</a> is not appropriate or has unrestricted rights (for example), you can use this option to input another username and password that will be used whenever the CAST Management Studio interacts with the Dashboard Service.</p> <p>To enable the option, place a check mark in the <b>Credentials tick box</b> and then enter an appropriate <b>username</b> and <b>password</b>. You can test the connection using the  <b>Test Connection</b> option.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• This option is NOT available when editing a Dashboard Service installed on a <b>CAST Storage Service</b>.</li> <li>• The <b>Trusted</b> option, if selected, flags the connection as trusted - there is then no need to enter a user or password (these fields will be disabled).</li> <li>• Please see <a href="#">CAST Management Studio - Rights</a> for more information about how server access rights and permissions are handled in the CAST Management Studio.</li> </ul>
	<b>Synchronize</b>	Please see <a href="#">Synchronize</a> .
	<b>Cleanup desynchronized applications</b>	<p>This option enables you to cleanup any Applications that are no longer referenced in the CAST Management Service (and thus not visible in the <a href="#">Applications view</a>), but which are still referenced in the current Dashboard Service. At some point in time a <a href="#">Stop Managing an Application</a> action will have been applied to these Applications:</p>  <p>Select the Applications you wish to cleanup and click <b>Finish</b> to completely remove them.</p>
	<b>Remove database lock</b>	<p>Use this option to remove any locks that may have been set on the snapshot computation engine in the current Dashboard Service.</p> <p>For example, if the connection between the client and server is lost for whatever reason during the snapshot generation process, then a lock will be set by the server preventing any further snapshot processing (you will see the error message: "Compute Metrics REJECTED: A snapshot is already being processed - the operation requested can not be completed now.").</p> <p>The option is indented to reset this type of lock so that you can continue processing your snapshots.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• Before using the option, make sure that no connection is currently running a snapshot generation - running two concurrent computations on the same database will produce erratic results.</li> <li>• In most circumstances, locks will be removed from the server automatically (indeed this is the recommended action), but this process can take a long time. This option is designed to override this automatic unlocking process.</li> </ul>

The **General tab** displays various options for your Dashboard Service:

-	<b>Version</b>	Displays the version of your Dashboard Service as installed in CAST Server Manager. This field is read-only.
	<b>Site Unique ID</b>	<p>The <b>Site Unique ID</b> refers to the unique ID of your Dashboard Service as registered in the CAST Management Service (MNGT database).</p> <p>This ID is determined automatically by the CAST Management Studio when you use the <a href="#">Discover</a> option on a Database Server in the <a href="#">Services view</a> (or when you first connect to the CAST Management Studio following a combined installation of all CAST database services).</p> <p>Please let the CAST Management Studio manage this ID - as such, you should <b>only</b> modify this ID if requested to do so by CAST Support.</p>
	<b>Test connection</b>	<p>Use this option to test the connection to the server hosting the service as defined in the <a href="#">Database server editor</a>.</p> <p>If the <b>Credentials</b> option is activated, then the <b>Test connection</b> option will use the <b>User</b> and <b>Password</b> defined in the relevant fields in this editor to test the connection to the server hosting the service.</p>

**Portal section**

<b>URL</b>	<p>This option has multiple uses:</p> <ul style="list-style-type: none"> <li>When clicking the <b>Open Url</b> option (see below), the URL you enter into the field will be opened in your default browser (useful if you want to del</li> <li>When clicking the <b>Add URL to Measurement Service</b> option (see below), the URL you enter into the field will be uploaded to the Measuremer the "microscope" button in the CAST Health Dashboard in order to drill down either in to the <b>CAST Engineering Dashboard</b> or the legacy <b>CAS</b> of you wish to upload (see the option <b>Add URL to Measurement Service</b> below for more information about the required format of the URL).</li> </ul> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>When a snapshot is generated, the contents of this URL field are taken into account for the <b>automatic PDF report generation feature</b> in the <b>le</b>. You must therefore ensure that before a snapshot is generated: <ul style="list-style-type: none"> <li>The field is <b>blank</b> and <b>does not</b> contain any URL</li> <li>Or that it contains a URL to your <b>live legacy</b> CAST Engineering Dashboard</li> </ul> </li> <li>If you have entered a URL to your live legacy CAST Engineering Dashboard using the secure <b>http protocol (https)</b> then you need to ensure th use your SSL certificate (whether self-signed or trusted) otherwise the snapshot will fail. To do so: <ul style="list-style-type: none"> <li>Obtain your legacy CAST Engineering Dashboard SSL certificate in <b>.cer</b> format - this is beyond the scope of this documentation, however, of exporting an SSL certificate to <b>.cer</b> file). Ensure the <b>.cer</b> file is named "<b>server_host_name.cer</b>".</li> <li>When you have the certificate in <b>.cer</b> format, you need to import it into the truststore of JRE used by the CAST Management Studio (this is <b>ol</b> command. To do so, open a <b>cmd</b> prompt and navigate to <b>&lt;CAST AIP installation folder&gt;\jre\bin</b></li> <li>Then use the following command to import the <b>.cer</b> file:</li> </ul> <pre>keytool -importcert -alias [server_host_name] -keystore ..\lib\security\cacerts -file [path to your server_host_name.cer]</pre> </li> <li>The snapshot will fail: <ul style="list-style-type: none"> <li>if the field is not blank and contains a URL other than your <b>live legacy</b> CAST Engineering Dashboard (i.e. for example to the CAST Health Dashboard).</li> <li>if the URL to the live legacy CAST Engineering Dashboard uses the secure http protocol (https) and you have not imported your SSL cert</li> </ul> </li> </ul>
<b>Open Url</b>	Click this option to open the URL defined in the <b>URL</b> field in your default browser.



**Add URL to Measurement Service**

Note you may need a specific license that enables drill down into the CAST Engineering Dashboard or the legacy CAST Engineering Dashboard. Please specifically have this license.

The **CAST Health Dashboard** enables users (via the "microscope" icon) to access directly the underlying data in the **CAST Dashboard Service Dashboard** or the legacy **CAST Engineering Dashboard**. Both dashboards provide detailed information about the top level data displayed in the **C**

Access to the underlying data is provided via a **URL** (pointing to the required dashboard) that is stored in the Measurement Service.

#### Deployment considerations

- If you have deployed the combined "HD-ED" WAR file then the URL is configured automatically to point to the CAST Engineering Dashboard as a separate CAST Engineering Dashboard deployment.
- However, if you have separate standalone deployments using the standalone **CAST-Health.war / CAST-Engineering.war / CAST-CED.war** files, the **Engineering Dashboard (ED)** or **legacy CAST Engineering Dashboard (CED)** is not implemented automatically and you will need to manually

#### Uploading a URL

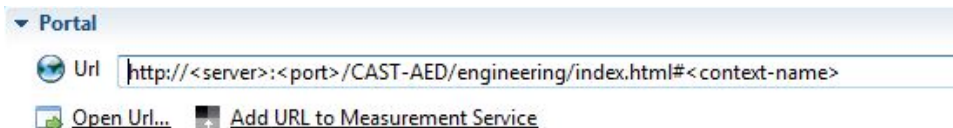
Although you can **activate** a Measurement Service to store all snapshot data for the current Management Service (see [Measurement Service editor](#)), the underlying CAST Engineering Dashboard unless you specifically add the URL of your CAST Engineering Dashboard or legacy CAST Engineering Service.

This option allows you to do so:

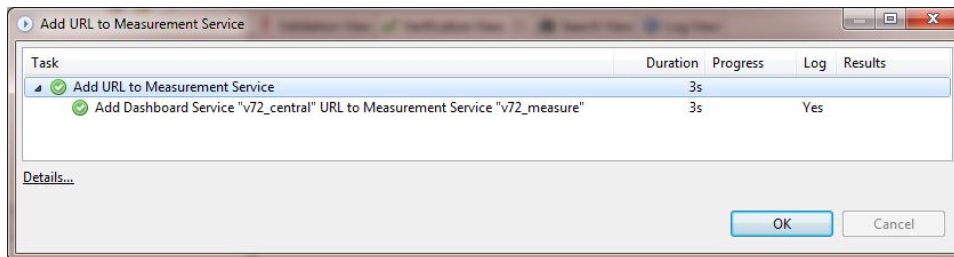
- **Uploading a URL for the legacy CAST Engineering Dashboard**
  - Simply enter the URL in the field **URL** above, in the format `http://<server>[:<port>]/CAST-CED`
    - you should tailor the <server> and <port> entries to your environment
- **Uploading a URL for the CAST Engineering Dashboard**
  - For each CAST Dashboard Service that you want to drill down into, you must first determine the **context "name"** of the Dashboard Service **CAST Engineering Dashboard (ED)**.
  - First locate and open the following file in a text editor:  
`%CATALINA_HOME%\webapps\CAST-Engineering\WEB-INF\context.xml`
  - Then take the following example which shows three CAST Dashboard Services each with different context "names" (the context "name" is forward slash in (for example) **name="jdbc/domains/APP1"** (i.e. APP1)). We will use the **APP1** name defined for the V80\_CENTRAL\_AF



```
<Resource name="jdbc/domains/APP1" url="jdbc:postgresql://NEFYN:2280/postgres"          initConnectio
V80_CENTRAL_APP1;"          username="operator" password="CastAIP"          auth="Container" type="
driverClassName="org.postgresql.Driver"          validationQuery="select 1"          initialSize="5"
maxWait="-1"/><Resource name="jdbc/domains/APP2" url="jdbc:postgresql://NEFYN:2280/postgres"
search_path TO V80_CENTRAL_APP2;"          username="operator" password="CastAIP"          auth="C
DataSource" driverClassName="org.postgresql.Driver"          validationQuery="select 1"          ini
maxIdle="10" maxWait="-1"/><Resource name="jdbc/domains/APP3" url="jdbc:postgresql://NEFYN:2280/postgr
initConnectionSqls="SET search_path TO V80_CENTRAL_APP3;"          username="operator" password="Cast
Container" type="javax.sql.DataSource" driverClassName="org.postgresql.Driver"          validatio
initialSize="5" maxActive="20" maxIdle="10" maxWait="-1"/>
```

- Enter the URL of the CAST Engineering Dashboard that runs from the current Dashboard Service into the **URL** field. This will take the following form: **Engineering/engineering/index.html#<context-name>**
  - you should tailor the <server> and <port> entries to your environment.
  - The <context-name> value refers to the value we determined earlier, in this example **APP1**. So we will add the following URL: **http://server/engineering/index.html#APP1**



- Click the **Add URL to Measurement Service** option.
- A progress dialog box will then display the results:



	<b>Open Dashboard</b>	<p>When clicked, the CAST Management Studio will launch a temporary <b>CAST Engineering / Security Dashboard</b>. This is primarily for validating a Snapshot. The portal is run on a JVM launched by the CAST Management Studio, hence an additional "java.exe" process will be displayed in Windows Task Manager. The JVM is killed when the CAST Management Studio is closed.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• When using the option you will be prompted for login credentials &gt; <b>admin/cast</b> (case-sensitive): note that this user has the ADMIN role only.</li> <li>• <b>CAST AIP schemas hosted in Microsoft SQL Server environment</b> - please be aware that the CAST Engineering / Security Dashboard will fail to load if you carried out a combined installation in CAST Server Manager using a Trusted connection (i.e. using Windows authentication) and are still using the automatically configured connection profile in the CAST Management Studio.</li> </ul>
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Portfolio tab

This section provides options for managing the set of Applications associated with the current Service:

<b>Corporate name</b>	<p>By default, this field will be pre-populated with "My Corporate". You can change this if you require - it is only visible in the CAST Engineering Dashboard and refers to the "corporate" entity (consisting of a System, Applications and Modules):</p> <table border="1" data-bbox="277 657 1024 909"> <thead> <tr> <th>Index</th> <th>05-01-2013</th> </tr> </thead> <tbody> <tr> <td>▲ My Corporate</td> <td></td> </tr> <tr> <td>▲ My System</td> <td><input type="checkbox"/></td> </tr> <tr> <td>▲ MEUDON</td> <td><input type="checkbox"/> V1</td> </tr> <tr> <td>MEUDON full content</td> <td><input type="checkbox"/> V1</td> </tr> </tbody> </table> <p>Changes will not be visible in the CAST Engineering Dashboard until you <a href="#">generate a Snapshot</a>.</p>	Index	05-01-2013	▲ My Corporate		▲ My System	<input type="checkbox"/>	▲ MEUDON	<input type="checkbox"/> V1	MEUDON full content	<input type="checkbox"/> V1
Index	05-01-2013										
▲ My Corporate											
▲ My System	<input type="checkbox"/>										
▲ MEUDON	<input type="checkbox"/> V1										
MEUDON full content	<input type="checkbox"/> V1										

Systems

Systems are entities that "sit under" the Corporate entity. They are only visible in the CAST Engineering Dashboard and consist of Applications and Modules:


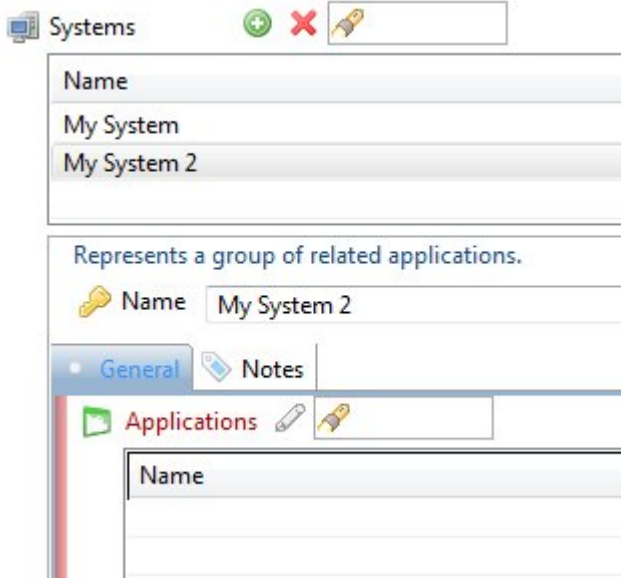

Index	05-01-2013
▲ My Corporate	
▲ My System	<input type="checkbox"/>
▲ MEUDON	<input type="checkbox"/> V1
MEUDON full content	<input type="checkbox"/> V1

- By default, a Dashboard Service that has been installed as part of a "combined" installation will have **one System** created by default (My System).
- A Dashboard Service that has been installed as a standalone will not contain any Systems.
- A Dashboard Service that has been migrated/updated to the current version will contain the Systems as they were prior to migration/updated.

Systems  

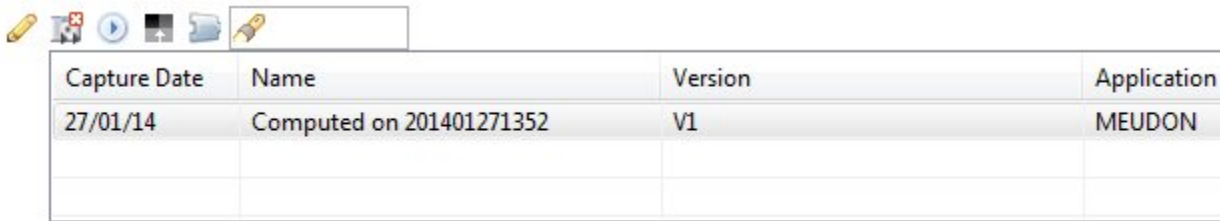
Name
My System

You can **add** multiple Systems to a Dashboard Service if you want, for example, Application A to belong to System 1 and Application B to belong to System 2. To do so, use the **Add** button as described below.

 <b>Add System</b>	<p>Use this button to add a new System to the Dashboard Service:</p>  <p>A hidden section under the list of Systems will be displayed enabling you to <b>rename</b> the System if you require (you will need to <a href="#">generate a Snapshot</a> before any changes are taken into account).</p> <p>This hidden section also lists the Applications that are associated to the System (see <a href="#">Assign Applications to Systems</a> for more information about this).</p>
 <b>Delete System</b>	<p>Use this button to delete the selected System. Any Applications that are associated to the System will not themselves be deleted, but you should be aware that deleting a System and then using the <a href="#">Synchronize</a> option will cause the following:</p> <ul style="list-style-type: none"> <li>the CAST Health Dashboard/CAST Engineering Dashboard to <b>stop displaying any existing snapshot results</b>.</li> <li>the current Dashboard Service to be removed from any Applications that were part of the deleted System.</li> </ul> <p>You will need to create a new System, <a href="#">assign the Application to that System</a> and <a href="#">generate a Snapshot</a>.</p>

### Snapshots tab


This tab provides a means to manage existing **Snapshots** stored on the current Dashboard Service. Snapshots govern the generation of data that can be exploited in the **CAST dashboards** and are derived from data created during the analysis process.









Capture Date	Name	Version	Application
27/01/14	Computed on 201401271352	V1	MEUDON

 [Take a snapshot for each application...](#)   •   [Check consistency of snapshot results](#)

Once you have successfully [generated a Snapshot](#) for an Application associated to the current Dashboard Service you will see it listed in this tab. You can then manage it:

 <b>Edit</b>	<p>Use this option to edit an existing <b>Snapshot</b>. The <a href="#">Snapshot editor</a> will then be displayed, allowing you to change the <b>Capture Date</b> (amongst other things).</p>
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	<p><b>Delete snapshot</b></p>	<p>Use this option to completely remove the selected Snapshot from the <b>Dashboard Service</b> and from the <b>Measurement Service</b> (if the snapshot has been uploaded there).</p> <p>This will start the deletion process and can take some time if the Snapshot contains a large amount of data.</p> <p>Please note that:</p> <ul style="list-style-type: none"> <li>• following the deletion of a snapshot you may need to restart your web application server so that the dashboards that rely on the data get the most up-to-date information</li> <li>• you can use the <a href="#">CLI</a> to remove a <b>specific</b> snapshot or a <b>list</b> of snapshots from the Dashboard Service and the Measurement Service.</li> </ul>
	<p><b>Consolidate</b></p>	<p>Use this option to <b>consolidate</b> an existing Snapshot (i.e. one that has already been generated). This consolidation process can take some time if the Snapshot contains a large amount of data.</p> <p>This process will re-generate all existing information for the snapshot. Consolidating an existing Snapshot will cause all metrics/quality rule information associated to the Snapshot to be <b>removed</b> from the Dashboard Service and replaced with the new information created during the new consolidation.</p> <p> <b>Notes</b></p> <ul style="list-style-type: none"> <li>• Note that this operation can sometimes cause data discrepancies with results computed when the quality model was different. To minimise this, the following items are taken into account when using the <b>Consolidate</b> option: <ul style="list-style-type: none"> <li>• changes in aggregation weights</li> <li>• changes in the tree structure (new contributions between a Quality Rule and a Technical Criteria, new aggregations, new Technical Criteria etc.)</li> <li>• changes in the module weight</li> <li>• changes in the thresholds used to compute grades based on rule compliance ratios and distributions</li> <li>• changes in critical contributions</li> </ul> </li> <li>• Note that computations executed on the Analysis Service are not taken into account by the <b>Consolidate</b> option: <ul style="list-style-type: none"> <li>• it does not re-analyze the source code</li> <li>• it does not re-compute metrics</li> <li>• it does not re-run procedures associated with metrics</li> </ul> </li> <li>• Note that the above options are executed <b>immediately</b>. A delete and a consolidation <b>cannot be reversed</b>.</li> </ul>
	<p><b>Upload snapshot to Measurement Service</b></p>	<p>Use this option to upload the selected snapshot to the <a href="#">Measurement Service</a>. Doing so will ensure that the data contained in the snapshots will be made available to those using the <b>CAST Health Dashboard</b>.</p> <p>Note that if the selected snapshot has already been uploaded to the Measurement Service, this option will perform a delete and then an update. In other words, the snapshot will be deleted and then re-uploaded to the Measurement Service.</p> <p>This option is particularly useful if you have chosen not to upload a snapshot to the Measurement Service when you <a href="#">Generate a Snapshot</a>.</p>
	<p><b>Generate Report</b></p>	<p>Please see <a href="#">Generate a Report</a> for more information.</p>
	<p><b>Take a snapshot for each application</b></p>	<p>This option will generate a snapshot for each Application that is assigned to the current Dashboard Service. Please see <a href="#">Generate a Snapshot</a> for more detailed information about the snapshot generation process.</p>



-	<p><b>Check consistency of snapshot results</b></p>	<p>This option will check the consistency and integrity of the snapshot results stored in the current Dashboard Service. Below is a list of the checks that are carried out:</p> <p><b>General Checks</b></p> <ul style="list-style-type: none"> <li>• Info: Lists the status number for the existing snapshots</li> <li>• Info: Lists the status number for the next snapshot</li> <li>• Info: Lists the ADG procedures that are not referenced in the metrics</li> <li>• Warning: A metric whose name does not match its technology category</li> </ul> <p><b>Check Object consistency</b></p> <ul style="list-style-type: none"> <li>• Error: Checks that only one CORPORATE object exists</li> <li>• Error: Checks the coherence of the technological objects via parent objects</li> <li>• Error: Checks the direction of the links - Corporate &gt; System &gt; Application &gt; Module and Organization &gt; Team &gt; Dev &gt; Module</li> </ul> <p><b>Check Metric consistency</b></p> <ul style="list-style-type: none"> <li>• Error: Checks all references in the Assessment Model</li> <li>• Error: Searches for orphans</li> <li>• Warning: Searches for business/technical criteria without any contributions</li> <li>• Error: Checks that all the metrics calculate a value</li> <li>• Warning: Checks that all the parameters have a value</li> <li>• Error: Checks that all the parameter values are defined</li> <li>• Warning: Checks that the count operator for a Quality Rule is distinct</li> <li>• Error: Checks that UA languages have the necessary configuration</li> <li>• Error: Checks that the thresholds are only ascending or descending</li> <li>• Error: Checks for the absence of obsolete metric groups (7, 8 and 9)</li> <li>• Error: Checks the coherence of the metric execution locations Group = 1, 4, 5, 10, 13 &gt; Type = 3 Group = 2 &gt; Type = 2</li> <li>• Warning: For types that equal 0 (deactivated)</li> <li>• Error: Metrics without a description in the metric tree</li> <li>• Warning: Checks for metrics whose description is identical to the name*</li> <li>• Error: Tests the existence of metric procedures (only on the Dashboard Service)</li> <li>• Error: Tests that the metric procedures have four NUMBER parameters</li> </ul> <p><b>Check Result consistency</b></p> <ul style="list-style-type: none"> <li>• Error: Checks that all the snapshots are consolidated, except, possibly the last one</li> <li>• Warning: Checks for any repetitions in the RESULTS</li> <li>• Checks for the Quality Rule 'Total' result impose 'Detail' result</li> <li>• Quality Rule: 'Total' result impose 'Grade' result</li> <li>• Distribution: 'Category' result impose 'Grade' result</li> <li>• Distribution (5.6+): no flat distribution</li> <li>• Measure: 'Measure' result impose 'Grade' result</li> <li>• Quality Rule non-regression: number of executed Quality Rules</li> <li>• Quality Rule: ratio of executed Quality Rules per technology</li> <li>• Quality Rule: 'Grade' results for module impose 'Grade' results for containers</li> </ul> <p><b>Check Status consistency</b></p> <ul style="list-style-type: none"> <li>• Checks for the absence of status on deleted snapshots</li> <li>• Error: Checks for the absence of repetitions in the STATUS</li> <li>• Error: Checks that the status of the object correctly reflects the last change of status</li> <li>• Error: Check the consistency of the object IDs</li> </ul>
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**Migration tab**

The **Migration tab** is only to be used in specific circumstances, i.e. when requested to do so by CAST Support.

**Assessment Model tab**

The **Assessment Model tab** enables you to manage the Assessment Model used for metric/Quality Rule processing during the snapshot generation process. Currently the following Assessment Models are delivered when CAST is installed or upgraded to the current version:

- a **CAST Management Studio managed Assessment Model** - i.e. the Assessment Model provided by default in file format when CAST is installed (located in the **assessmentModels** folder at the root of the CAST installation folder)
- an **Assessment Model** is also delivered embedded in the Dashboard Service to ensure continuity for some services that rely on the presence of an Assessment Model before the initial snapshot generation process. Please do not import this Assessment Model (before generating a snapshot) and assign it to a Dashboard Service. This Assessment Model must not be used to generate data.
- you may also have an Assessment Model **from a previous version** of CAST if you have upgraded to the current version.

As such, the following behavior is true:

Behavior	Action
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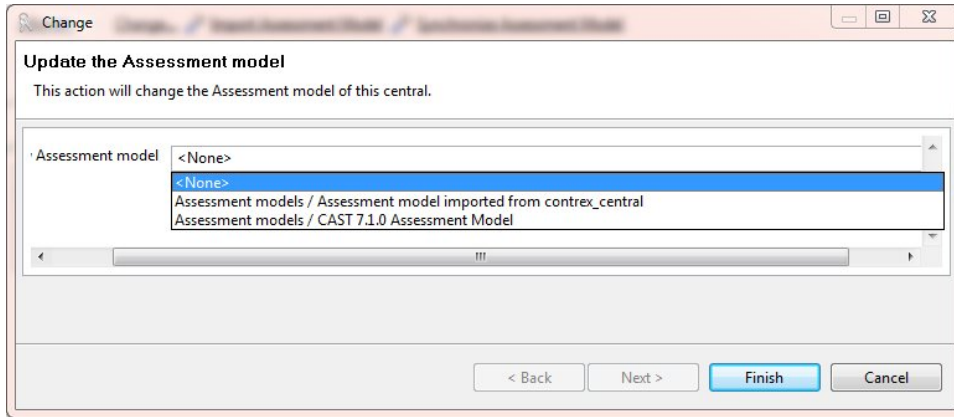


<p>If the current Dashboard Service was installed as part of a "<b>combined</b>" installation, then the CAST Management Studio managed Assessment Model - i.e. the Assessment Model provided by default in file format when CAST is installed (located in the <b>assessmentModels</b> folder at the root of the CAST installation folder) will be assigned to the current Dashboard Service.</p>	<p>When you <a href="#">generate a Snapshot</a> or use the manual <b>Synchronize Assessment Model</b> option, the CAST Management Studio managed Assessment Model will be transferred and embedded into the Dashboard Service and used during the snapshot generation. Any existing Assessment Model in the Dashboard Service will be overwritten.</p>
<p>If the current Dashboard Service was installed as a "<b>standalone</b>", then no Assessment Model will be associated to the Dashboard Service.</p>	<p>You cannot <a href="#">generate a Snapshot</a> on this Dashboard Service until you assign an Assessment Model to it - see below.</p>

**Available options**

<p>&lt; N o n &gt; or N a m e o f A s s e s s m e n t M o d e l</p>	<ul style="list-style-type: none"> <li>• <b>&lt;None&gt;</b>: This indicates that no Assessment Model is assigned to the Dashboard Service. This is the case if you are using a Dashboard Service t<b>andalone</b>".</li> </ul> <p>If you leave the drop down list set to <b>&lt;None&gt;</b>, then you cannot <a href="#">generate a Snapshot</a> on this Dashboard Service until you associate an Assessment Model to the Dashboard Service.</p> <ul style="list-style-type: none"> <li>• <b>Name of Assessment Model</b>: If you see the name of an Assessment Model instead of <b>&lt;None&gt;</b>, this indicates that the Model in question is assigned to the Dashboard Service. A name will be displayed: <ul style="list-style-type: none"> <li>• if you have imported an Assessment Model</li> <li>• if you have used the <b>&lt;Change&gt;</b> option (see below) to select an Assessment Model to assign to the current Dashboard Service</li> </ul> </li> </ul>
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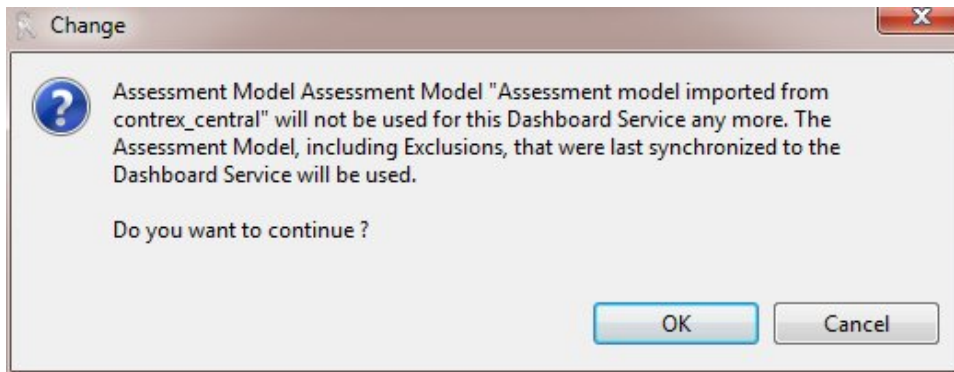
Use this option to choose an Assessment Model to assign to the current Dashboard Service. A dialog box will be displayed enabling you to select the one you want to assign - only models that are present in the [Assessment Models view](#) will be available for selection:



Choose the Assessment Model you require and click **Finish** to proceed. The selected Assessment Model will now be assigned to the current Dashboard Service.

**Notes**

- If you are using the **Change** option to select <None> then a warning will be displayed as follows:



This option will import the Assessment Model that is currently embedded in your Dashboard Service and display it as **Assessment model imported from <dashboard\_service\_name>** in the [Assessment Models view](#). In addition, the imported Assessment Model will be assigned to the current Dashboard Service.

**Notes**

- CAST recommends that you **do not** import more than **five** Assessment Models into the [Assessment Models view](#). The performance of the CAST can be adversely affected if you import more than this.
- After upgrading AIP, or installing/upgrading an extension, the Assessment Model is installed on both the Dashboard Service schema and on the Management Service schema. The Management Service schema is the only "repository" that preserves user customizations (rule activations, contribution, weights, rule contributions). The Management Service schema is the only "repository" that preserves user customizations (rule activations, contribution, weights, rule contributions). As a consequence, it is **STRONGLY** advised to ensure that the Assessment Model in the Dashboard Service schema is aligned with the Management Service schema by [generating a Snapshot](#) or using the Synchronize Assessment Model (see below) before transferring metrics with the "Import assessment model" from a Dashboard Service schema to a Management Service schema.

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Use this option to synchronize and embed the current Assessment Model in the current Dashboard Service.  
In other words, this option will overwrite the existing Assessment Model in the Dashboard Service with any changes you may make using the [Assess](#) next snapshot generation process will then use this Assessment Model.


### Background Facts upload file


Choose the XML file that contains your **Background Facts** data (previously known as Productivity data) to measure the productivity of your organization, teams and developers. For more information about this, please see: [Configuring the Background Facts upload file](#).

### Exclusions

This section enables you to exclude an Application(s) and/or Module(s) assigned to the current Dashboard Service from a specific Health Factor, Quality Rule and/or Technical Criterion. In other words, the selected Application/Module will not be included in the chosen Health Factor, Quality Rule and/or Technical Criterion the next time a Snapshot is generated using the associated Assessment Model.

To **add a new** Exclusion:

- Make sure that an Assessment Model has been imported for the current Dashboard Service (i.e. if **<None>** is displayed in the drop down list above, you can still add a new exclusion, however, you cannot fully configure it)
- Then click the  button to add a new exclusion - a new line will appear in the list of exclusions and a hidden configuration section will appear:



- In this section you need to configure:
  - **Portfolio** (either an Application or a Module) > Click the **Select** option and a new dialog box will be displayed enabling you to select the Application or Module you require. This option defines which Application or Module (assigned to the current Dashboard Service) will be excluded. If you have no Applications/Modules defined, then you will need to first create them.
  - **Metric** (Health Factor or Quality Rule or Technical Criterion) > Click the Select option and a new dialog box will be displayed enabling you to select the metric you require. This option defines which Health Factor, Quality Rule or Technical Criterion the chosen Application or Module will be excluded from.

- Once the configuration is complete, the new exclusion will appear in the list:

Portfolio	Metric
Application	Health factor

Portfolio  
  Application  
  Module

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Metric  
 Health factor  
 Quality rule  
 Technical criterion

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To **edit an existing** Exclusion:

- Select the item in the list
- Edit the item using the list

To **remove an existing** Exclusion:



- Select the item in the list
- Click the  button

### Notes tab

The **Notes tab** is simply an area that you can use to make notes or remarks about the selected item.

### Editor buttons

The following buttons are available in the view:

	<b>Minimize</b> > Minimize the entire window
	<b>Maximize</b> > Maximize the entire window

See Also

[Analysis Service editor](#) | [Measurement Service editor](#)