

# Assessment Model adaptation and enrichment distribution

 This page is no longer maintained and may be obsolete.

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## Useful Links

[Platform administration information](#)



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There are five main basic use cases for handling Assessment Models customizations:

1. Distribute a custom Assessment Model from one 7.2.x implementation to another
2. Reuse a custom Assessment Model from one 7.2.x Dashboard Service to another
3. Merge enrichments (new indicators) from multiple Assessment Models into one
4. Install enrichments (new indicators) from 7.2.x Server Manager custom installation packages
5. Merge settings (weight, critical contribution, thresholds, ...) from two Assessment Models into one

Each is explained in more detail below.

They can obviously be combined together to achieve larger goals:

- E.g.: Merge settings and enrichments from multiple Assessment Models then distribute the resulting Assessment Model to the production implementation to use it on existing production Dashboard Services

## Use case overview

## Use Case #1: Distribute a custom Assessment Model from one 7.2.x implementation to another

Starting from:

- A 7.2.x Assessment Model in a first Management Base

That is:

- As delivered by CAST or not
- Enriched with new indicators or not
- Assigned to a Dashboard Service or not

And you want to:

- distribute this custom Assessment Model into another 7.2.x Management Base

## Use Case #2: Reuse a custom Assessment Model from one 7.2.x Dashboard Service to another

Starting from:

- A 7.2.x Assessment Model in a first Management Base

That is:

- As delivered by CAST or not
- Enriched with new indicators or not
- Assigned to a Dashboard Service or not

And you want to:

- reuse this custom Assessment Model for Snapshots of another 7.2.x Dashboard Service

## Use Case #3: Merge enrichments (new indicators) from multiple Assessment Models into one

Starting from:

- A first 7.2.x Assessment Model, considered as the target
- One or many 7.2.X Assessment Models, considered as sources

That are:

- Enriched with new indicators

And you want to:

- merge all enrichments from the source Assessment Models into the target Assessment Model

## Use Case #4: Install enrichments (new indicators) from 7.2.x Server Manager custom installation packages

Starting from:

- A 7.0.x or 7.1.x Assessment Model in the CAST Management Studio, assigned to at least one Dashboard Service
- A 7.0.x or 7.1.x Assessment Model in the CAST Management Studio, unassigned to any Dashboard Service
- A 7.0.x "Metric Tree" in the Dashboard Service, i.e., no imported Assessment Model in the CAST Management Studio

That is:

- As delivered by CAST or not
- Enriched with new indicators

And you want to:

- install enrichments (new indicators) from 7.2.x Server Manager custom installation packages

## Use Case #5: Merge settings (weight, critical contribution, thresholds, ...) from two Assessment Models into one

Starting from:

- A first 7.2.x Assessment Model, considered as the target
- A second 7.2.X Assessment Model, considered as the source

That are:

- Not enriched with new indicators (in case of new indicators, follow the Use Case #3 as well)

And you want to:

- merge some settings from the source Assessment Models into the target Assessment Model

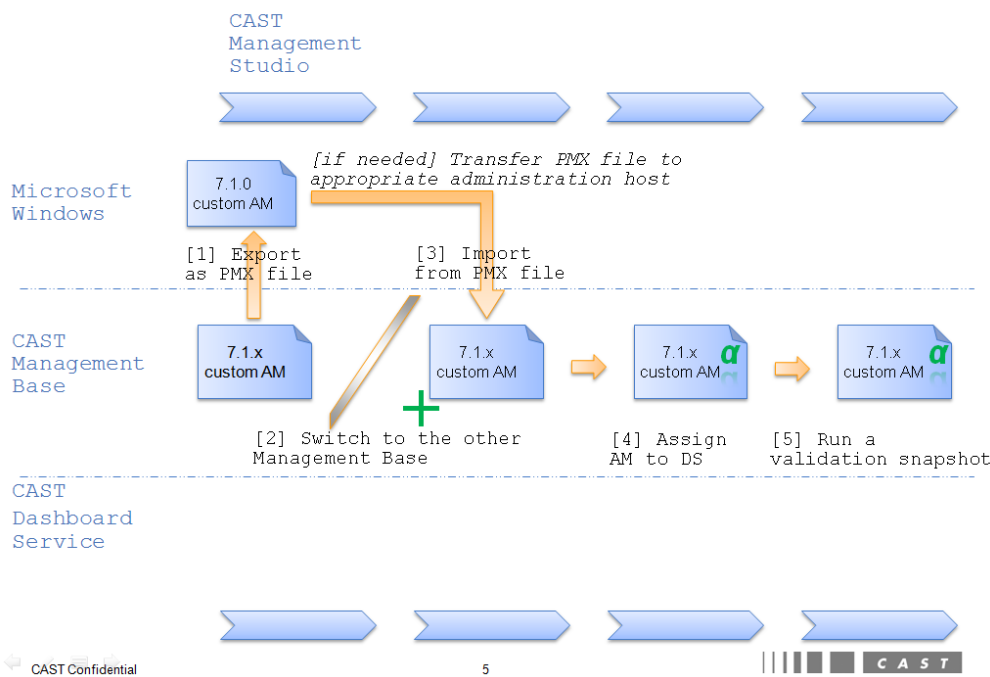
## Use case process description

This section presents the steps to perform that relates to Assessment Model customization handling.

### Use Case #1: Distribute a custom Assessment Model from one 7.2.x implementation to another

The distribution of a custom Assessment Model from one 7.2.x implementation to another relies on CAST Management Studio import/export as PMX file capability

## Sharing Assessment Model between Management Bases



(the chart above refers to 7.1.x yet is still valid with 7.2.x)

Basically, this is about

1. Exporting from the source Management Base the Assessment Model to share as a PMX file
2. Connecting to the target Management Base (and transfer the export PMX file to a location accessible from the CAST Management Studio in use)
3. Importing into the target Management Base the Assessment Model present in the PMX file. **Important note:** use the "create" action from the import wizard
4. Assign the imported Assessment Model to the appropriate Dashboard Service
5. Run a validation Snapshot to ensure that all required configuration is present in the target environment.

## Details on some of the tasks

### Exporting Assessment Model as PMX file

In the CAST Management Studio:

- invoke the "Export File..." action from the CAST Management Studio "File" menu
- select the custom Assessment Model for export
- ignore all other items
- save the export as assessmentModel\_7.2.0\_Custom.pmx
- confirm until the end of the wizard

- control the execution status in the task progress window

### Import Assessment Model as PMX file

In the CAST Management Studio

- invoke the "Import File..." action from the CAST Management Studio "File" menu
- select the assessmentModel\_7.2.0\_Custom.pmx file exported in previous step
- select only the Assessment Model (in case the export file was including other entities)
- select the "create" action
- confirm until the end of the wizard
- control the execution status in the task progress window

### Assign the Assessment Model to a Dashboard Service

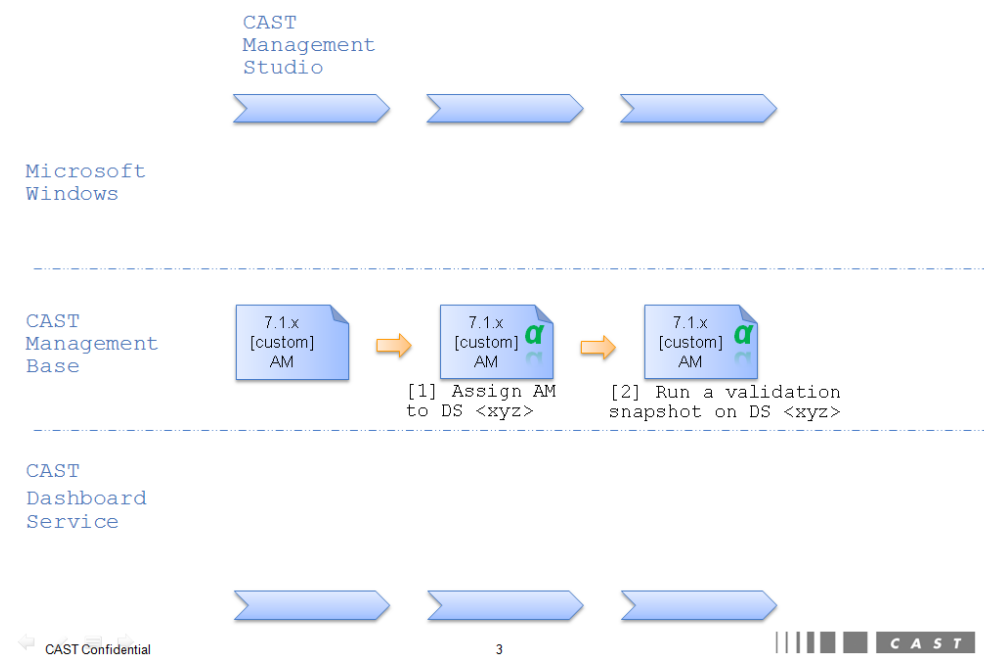
In the CAST Management Studio

- open the Dashboard Service editor
- select the "Assessment Model" tab
- invoke the "change..." action
- select an existing Assessment Model from the drop-down list of the wizard
- confirm until the end of the wizard
- control the execution status in the task progress window

## Use Case #2: Reuse a custom Assessment Model from one 7.2.x Dashboard Service to another

The reuse of a custom Assessment Model from one 7.2.x Dashboard Service to another relies on shared assignment of a single Assessment Model by multiple Dashboard Services

### Sharing Assessment Model within 1 Management Base



(the chart above refers to 7.1.x yet is still valid with 7.2.x)

Basically, this is about

1. Assign the Assessment Model to reuse to the appropriate Dashboard Service
2. Run a validation Snapshot to ensure that all required configuration is present in the target environment.

### Details on some of the tasks

#### Assign the Assessment Model to a Dashboard Service

In the CAST Management Studio

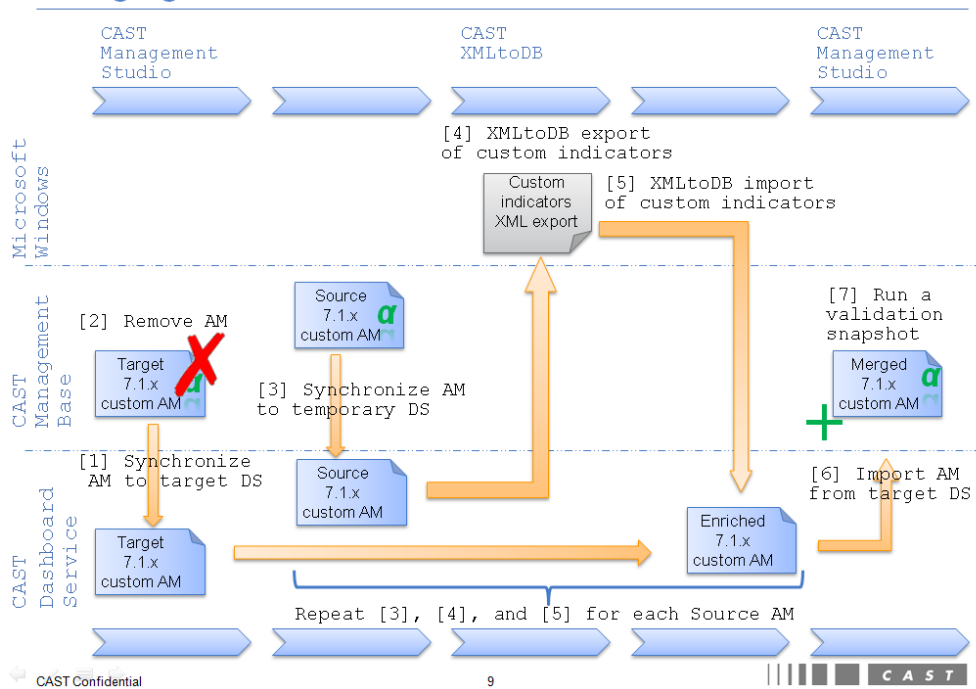
- open the Dashboard Service editor
- select the "Assessment Model" tab

- invoke the "change..." action
- select an existing Assessment Model from the drop-down list of the wizard
- confirm until the end of the wizard
- control the execution status in the task progress window

## Use Case #3: Merge enrichments (new indicators) from multiple Assessment Models into one

The merge of enrichments (new indicators) from multiple Assessment Models into one relies on XMLtoDB tooling that can import/export specific scope of data into/from Dashboard Services

### Merging enrichments from 7.1.0 Assessment Models



(the chart above refers to 7.1.x yet is still valid with 7.2.x)

Basically, this is about:

1. Synchronizing a first Assessment Model, considered as the target, onto a target Dashboard Service (Best option is to Synchronize the default CAST 7.1.x Assessment Model)
2. Remove this Assessment Model from the CAST Management Studio
3. Synchronizing a second Assessment Model, considered as the source, onto a temporary Dashboard Service
4. Export custom indicators from the temporary Dashboard Service using XMLtoDB tooling and a custom export Scope to accurately target some or all custom indicators
5. Import custom indicators into the target Dashboard Service using XMLtoDB tooling and the same Scope. Go back to the 3rd step in case you have multiple source Assessment Model to process. **Important note:** when dealing with multiple sources, ensure the indicators' external IDs do not overlap (if so, update external IDs prior to the synchronization step.)
6. From CAST Management Studio, Import the Assessment Model from the target Dashboard Service that will now contain the custom indicators from the source Assessment Model(s).
7. Run a validation Snapshot to ensure that all required configuration is present in the target environment.

### Details on some of the tasks

#### Synchronize Assessment Model in Dashboard Service

In the CAST Management Studio

- open the Dashboard Service editor
- select the Assessment Model tab
- invoke the "Synchronize Assessment Model" action
- control the execution status in the task progress window

#### Removing Assessment Model

In the CAST Management Studio:

- in the "Assessment Models" view

- select the custom Assessment Model
- invoke the "Remove" action from the contextual menu
- wait until the action completes

### XMLtoDB export scope definition

A scope is the declaration of a list of SQL Tables to consider for data transfer to or from an XML file. It can refine the range of rows to consider in these SQL Tables through the declaration of filters on Column field values.

To create your own export/import scope:

- create a copy of CentralModel.xml file that can be found in the installation directory of AIP: **MyCentralModel.xml**
- search for <scope name="CustomerMetrics">
- copy-paste the whole XML block into <scope name="CustomerMetricsScope1">
- update the filtering configuration on METRIC\_ID column for DSS\_METRIC\_TYPES, DSS\_METRIC\_TYPE\_TREES, DSS\_METRIC\_VALUE\_TYPES, DSS\_METRIC\_DESCRIPTIONS, and DSS\_METRIC\_STATUS\_THRESHOLDS to a narrower range such as minvalue="2000000" maxvalue="3000000", depending on the external IDs of the indicators you need to export / import
- (assuming you are not also dealing with a Universal Analyzer configuration) update the filtering configuration on DSS\_METRIC\_PARAM\_TYPES and DSS\_METRIC\_PARAM\_VALUES tables by removing the filter="((METRIC\_ID >= 2000000) or (OBJECT\_TYPE\_ID >= 2000000))" advanced filter and adding the same <scopecolumn name="METRIC\_ID" minvalue="2000000" maxvalue="3000000" />

```
<scope name="CustomerMetricsScope1">
  <scopetable name="DSS_METRIC_TYPES" order="METRIC_ID">
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_TYPE_TREES" order="METRIC_PARENT_ID, METRIC_INDEX, METRIC_ID">
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_VALUE_TYPES" order="METRIC_ID, METRIC_VALUE_INDEX">
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_DESCRIPTIONS" order="METRIC_ID, DESCRIPTION_TYPE_ID, LANGUAGE">
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_PARAM_TYPES" order="METRIC_ID, PARAM_INDEX, OBJECT_TYPE_ID" >
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_PARAM_VALUES" order="METRIC_ID, PARAM_INDEX, OBJECT_TYPE_ID, PARAM_NUM_VALUE, PARAM_CHAR_VALUE" >
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
  <scopetable name="DSS_METRIC_STATUS_THRESHOLDS" order="METRIC_ID, STATUS">
    <scopecolumn name="METRIC_ID" minvalue="3001000" maxvalue="3001999" />
  </scopetable>
</scope>
```

### XMLtoDB export from Dashboard Service

To export custom indicators from the source Dashboard Service database using your scope (CAST Storage Service 2 sample), run the following command in a Microsoft DOS Command Prompt:

```
<installation directory>\xmltodb /src:db /c:<MyCentralModel>.xml /scp:<CustomerMetricsScope1> /f:
<MyExportFromSourceDSUsingCustomerMetricsScope1>.xml /db:<SourceDashboardServiceName> /cs:LIBPQ:localhost:2280,
postgres /st:caststorageservice /u:operator /p:CastAIP
```

(change values where appropriate)

### XMLtoDB import in Dashboard Service

To import custom indicators into the target Dashboard Service database using your scope (CAST Storage Service 2 sample), run the following command in a Microsoft DOS Command Prompt:

```
<installation directory>\xmltodb /src:xml /c:<MyCentralModel>.xml /scp:<CustomerMetricsScope1> /f:
<MyExportFromDSUsingCustomerMetricsScope1>.xml /db:<TargetDashboardServiceName> /cs:LIBPQ:localhost:2280,postgres
/st:caststorageservice /u:operator /p:CastAIP
```

(change values where appropriate)

### Import Assessment Model in CAST Management Studio

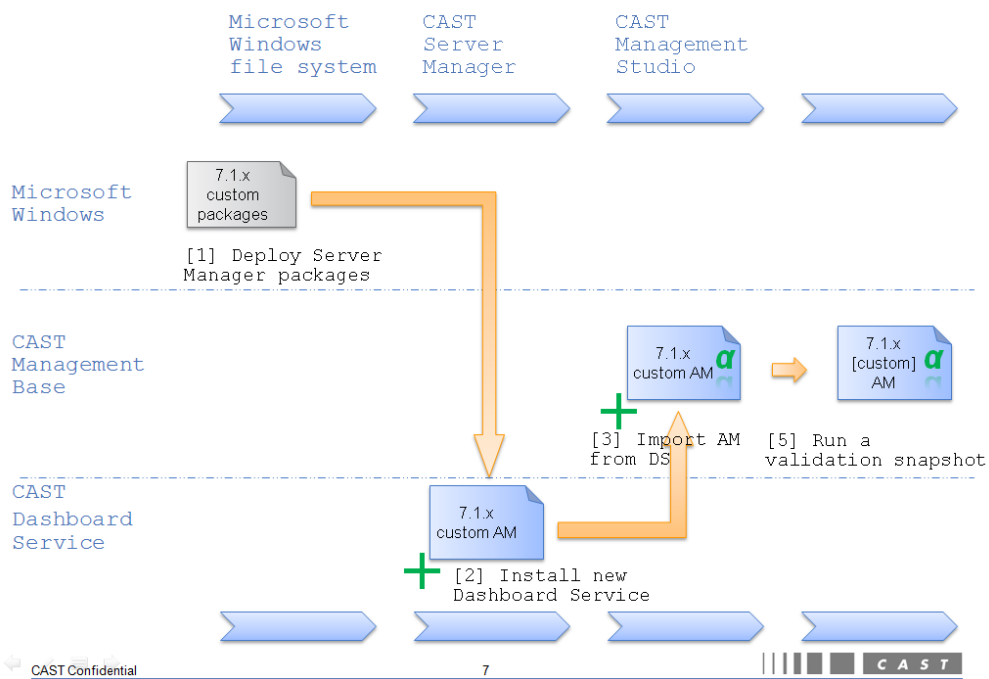
In the CAST Management Studio

- open the Dashboard Service editor
- select the Assessment Model tab
- invoke the "Import Assessment Model" action to load from the Dashboard Service the default 7.1.0 Assessment Model enriched with the custom indicators from the XMLtoDB import
- control the execution status in the task progress window

## Use Case #4: Install enrichments (new indicators) from 7.2.x Server Manager custom installation packages

The installation of enrichments (new indicators) from 7.2.x Server Manager custom installation packages relies on CAST Management Studio Assessment Model import from Dashboard Services

## Installing enrichments from 7.1.0 installation packages



(the chart above refers to 7.1.x yet is still valid with 7.2.x)

Basically, this is about

1. Deploying the custom installation packages on the machine Server Manager is installed: please refer to [Where are custom components stored?](#) section from the [CAST Server Manager User Components User Guide](#)
2. Install a new Dashboard Service using these packages. **Important note** : please remove custom installation packages from the deployment location once you are done so as to avoid unwillingly and unknowingly using them for future installations.
3. From CAST Management Studio, discover the new Dashboard Service
4. Import its Assessment Model
5. Run a validation Snapshot to ensure that all required configuration is present in the target environment.

### Details on some of the tasks

#### Import Assessment Model in CAST Management Studio

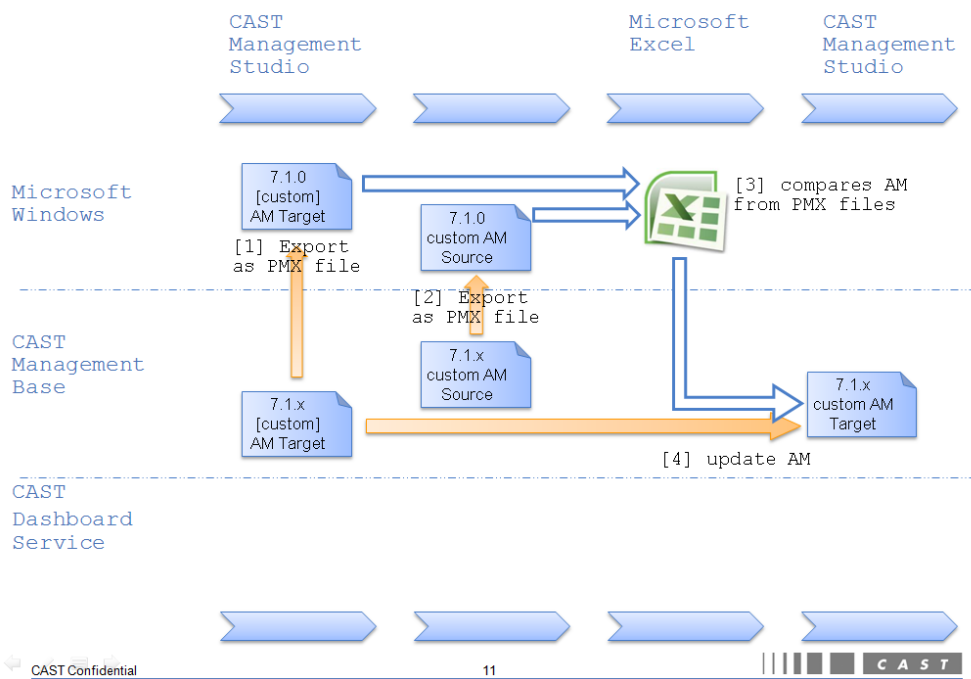
In the CAST Management Studio

- open the Dashboard Service editor
- select the Assessment Model tab
- invoke the "Import Assessment Model" action to load from the Dashboard Service the default 7.2.0 Assessment Model enriched with the custom indicators from the XMLtoDB import
- control the execution status in the task progress window

### Use Case #5: Merge settings (weight, critical contribution, thresholds, ...) from two Assessment Models into one

The merge of settings (weight, critical contribution, thresholds, ...) from two Assessment Models into one relies on CAST Management Studio import/export as PMX file capability and Microsoft Excel comparison tooling

## Merging settings from 7.1.0 Assessment Models



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(the chart above refers to 7.1.x yet is still valid with 7.2.x)

Basically, this is about

1. Exporting as a PMX file a first Assessment Model, customized or not, considered as the target,
2. Exporting as a PMX file a second Assessment Model, whose customizations are to be - partially or totally - preserved, considered as the source,
3. Comparing the two PMX files using the Microsoft Excel comparison tool
4. Updating the target Assessment Model where appropriate to match source configuration

### Details on some of the tasks

#### Exporting Assessment Model as PMX file

In the CAST Management Studio:

- invoke the "Export File..." action from the CAST Management Studio "File" menu
- select the custom Assessment Model for export
- ignore all other items
- save the export as assessmentModel\_7.2.0\_[Target|Source].pmx
- confirm until the end of the wizard
- control the execution status in the task progress window

#### Compare Assessment Model PMX files

##### Running the comparison tool

The comparison tool can be found here: [AssessmentModel\(Documentation\)Comparator\\_toBeUnzippedIn-Y-Drive.zip](#)

In Microsoft Windows Explorer

- copy assessmentModel\_7.2.0\_Source.pmx file in Y:\Source\
- copy assessmentModel\_7.2.0\_Target.pmx file in Y:\Target\

In Microsoft Excel

- open the MS Excel comparison tool
- ensure the pre-requisites are met (namely, accessing comparison tool through Y: drive or updating MS Excel data source according to your configuration)
- fill the source file field with assessmentModel\_7.2.0\_Source.pmx
- fill the source PMX file version with 7.2.x
- fill the target file field with assessmentModel\_7.2.0\_Target.pmx
- fill the target PMX file version with 7.2.x
- run the "Transform PMX files" action
- once Microsoft Windows DOS Command Prompts are done, run the "Upload PMX files" action



## Identify and understand differences

The comparison tool will help you identify the differences you may want to use to further update the migrated Assessment Model (using Assessment Model editor in CAST Management Studio).

The comparison tool will identify evolutions of different types:

- Functional configuration of every quality and sizing indicators
  - New indicator
  - Removed indicator
  - Renamed indicator
  - For Business and Technical Criteria
    - New contributions
    - Removed contributions
    - Updated contributions with a different weight
    - Updated contributions with a different critical contribution option value
  - For Quality Rules, Distributions, and Measures
    - Updated activation status
    - Updated grade computation thresholds
  - For Sizing Measures
    - Updated activation status
- Functional configuration of Parameters
  - New parameter
  - Removed parameter
  - Renamed parameter
  - Updated default value
  - Updated overriding configuration
- Technical configuration of Quality Rules, Distributions, and Measures and Sizing Measures
  - Updated implementation
  - For Quality Rules
    - Updated XXL option value
    - Updated Unified option value
    - Updated list of applicable technologies
      - Added applicable technology
      - Removed applicable technology
    - Updated associated information configuration

## What to do with differences

As general guidelines, please process the differences the following way:

- Functional configuration:
  - Additions and deletions are functional decisions,
  - Active status update are functional decisions,
  - Contribution-related configurations are functional decisions
- Technical configuration:
  - Implementation and associated information configuration evolutions must be carefully looked into to identify the "right" value as they control the proper functioning of the platform
  - Applicable technology list, XXL and Unified option updates must be carefully looked into to identify the "right" value as they control the proper assessment of applications

## Manually update target Assessment Model according to your needs

Back in the CAST Management Studio

- open the Assessment Model editor
- edit the target Assessment Model according to your likings