

CA Asset Portfolio Management

Release Notes
Release 12.9.00



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CA Technologies Product References

This documentation set references the following CA Technologies products:

- CA Asset Converter
- CA Asset Portfolio Management (CA APM)
- CA Business Intelligence
- CA Client Automation
(formerly CA IT Client Manager)
- CA Configuration Management Database (CA CMDB)
- CA Embedded Entitlements Manager (CA EEM)
- CA Management Database (CA MDB)
- CA Process Automation™
- CA Service Catalog
- CA Service Desk Manager
- CA Software Asset Manager (CA SAM)
- CA SiteMinder®

This document set also references the following component, which formerly used a different name:

- Common Asset Viewer
(formerly Asset Management System or AMS)

Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At <http://ca.com/support>, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at <http://ca.com/docs>.

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Chapter 1: Welcome

Welcome to CA APM Release 12.9.

This section contains the following topics:

[What this Document Covers](#) (see page 7)

[International Support](#) (see page 7)

[Published Fixes](#) (see page 8)

[Find Product Roadmap Information](#) (see page 8)

What this Document Covers

This document provides information about new, enhanced, and removed features, documentation, and system requirements for CA APM.

Note: At publication time, the product supports the system and product requirements that are listed in this document. The most current list of system and product requirements is available in the [Compatibility Matrix](#) on CA Support Online.

International Support

An internationalized product is an English product that operates correctly on local language versions of the required operating system and required third-party products, and supports local language data for input and output. Internationalized products also support the ability to specify local language conventions for date, time, currency and number formats.

A translated product (sometimes referred to as a localized product) is an internationalized product that includes local language support for the user interface of the product, online help and other documentation, and local language default settings for date, time, currency, and number formats.

In addition to the English release of CA APM, CA Technologies supports only those languages listed in the following table.

Object Contact	Internationalized	Translated (Post-GA)
Brazilian Portuguese	Yes	Yes
French	Yes	Yes
German	Yes	Yes

Object Contact	Internationalized	Translated (Post-GA)
Italian	Yes	Yes
Japanese	Yes	Yes
Spanish	Yes	Yes

Published Fixes

To see the list of all published fixes for CA APM, see the [CA Asset Portfolio Management Solutions and Patches page](#) on CA Support Online.

Find Product Roadmap Information

The CA IT Asset Manager Product Roadmap outlines general product direction and provides information that can help you plan and manage your asset management implementation. For example, the Product Roadmap provides you with the following information:

- Planned features and functionality
- Removed features and functionality
- Internationalization and localization
- Product direction

To find the CA IT Asset Manager Product Roadmap

1. Open a browser and navigate to <http://ca.com/support>.
The CA Support page appears.
2. Select CA IT Asset Manager from the Product finder drop-down list.
The CA IT Asset Manager page appears.
3. Scroll to the Product Status section, and click the CA IT Asset Manager Product Roadmap link.
If you are not already logged in, the CA Support login page appears.
4. Log in to CA Support.
The CA IT Asset Manager Product Roadmap appears.

Chapter 2: Enhanced and Removed Features

This section contains the following topics:

[Enhanced Features](#) (see page 9)

[Removed Features](#) (see page 14)

Enhanced Features

This release includes enhancements to the following features:

- [Installation](#) (see page 9)
- [Change Asset Model](#) (see page 10)
- [Change Model Asset Family](#) (see page 10)
- [Data Importer](#) (see page 10)
- [Data Synchronization](#) (see page 11)
- [Costs and Payments](#) (see page 12)
- [Custom Relationships](#) (see page 12)
- [Configuration Usability Improvements](#) (see page 12)
- [Product-Provided User Roles](#) (see page 13)
- [Subgroup Assets](#) (see page 13)
- [Common Home Page](#) (see page 13)
- [Migration](#) (see page 14)
- [FIPS Compliance](#) (see page 14)

Installation

The installation process includes the following improvements:

- **Simplified installation**—Provides a new installation wizard with a single installation process to install and configure all product components.
- **Retry and Repair**—Allows you to restart an interrupted installation. Also allows you to fix issues with a completed installation.

For more information, see the *Implementation Guide*.

Change Asset Model

You can change the model for selected assets. For example, you identified 15 assets that were entered into the product with an incorrect server model. You can now search and change the server model for all selected assets simultaneously.

For information about how to change the model for an asset, see the *User Guide*.

Change Model Asset Family

You can change the asset family of selected models. For example, you realize that a set of related computer models were incorrectly imported into the product using the hardware asset family. You can now change the asset family for all selected models simultaneously.

Note: When you change the asset family for a model, the asset family is also changed for the associated assets.

For information about how to change the asset family for a model, see the *User Guide*.

Data Importer

The product data import functions have been enhanced in the following ways.

- Data Importer Web Client
 - Load Source Fields—Add all source fields from the source data file to your import mapping. If you have existing mappings, Load Source Fields allows you to replace those mappings with the source fields in the source data file. Load Source Fields also allows you to add the source fields from the source data file that you do not already have in your mappings.
 - View Schedule Details—View the schedule details for a scheduled import job that you created.
 - View Logs—View the Data Importer log files to see the details of the imports that have completed. The Data Importer creates a log file for each import that you run, including imports that were submitted immediately or scheduled for a future time. All import activities are saved in the log files. If more than one log file is available (for example, for a scheduled import that has completed a few times already), all files are listed with their corresponding creation dates.
- Data Importer through a Command Line—Submit data imports and verify the submitted import job status by executing a command line.
- Data Importer through a Process Workflow—Submit data imports as a part of an overall business process workflow using CA Process Automation or another workflow provider.

- **Product-Provided Data Imports**—Import data using a set of predefined data imports that already contain all mappings and settings. These imports help you get started with data management. You cannot modify the mappings and settings in the product-provided data imports. However, you can copy the imports and modify the copies.

For information about how to use the Data Importer to import or delete data, see the *Administration Guide* and the *Implementation Guide*.

Data Synchronization

When you implement CA APM with CA SAM, the products share data that is required for hardware and software asset management. To maintain the integrity of the data and of the asset management process, data must be synchronized. Data synchronization ensures that objects that are the same in both products contain the same data values. Data synchronization has been enhanced in the following ways:

- **Configure Data Synchronization**—You can configure the automatic data synchronization of CA APM and CA SAM data to suit your business needs. You can configure the type and attributes of the objects that are synchronized. You can also configure the criteria that are used to select the data rows for synchronization.
- **Synchronize CA APM data with an existing CA SAM instance**—If you are implementing CA APM with an existing instance of CA SAM, there is existing CA SAM data that has not yet been synchronized. Before you start the automatic synchronization process, synchronize the existing CA SAM data with the CA APM data. For more information, see the following article on the [CA SAM product page](#) on CA Support, Recommended Reading section: "How to Synchronize CA APM Data with an existing CA SAM Instance".

For information about data synchronization, see the *Implementation Guide*.

Costs and Payments

You can track financial information that is associated with assets and legal documents. Tracking costs and payments helps reduce the risk of overpaying or underpaying vendors and suppliers. This information is also useful when deciding about future equipment purchases and deployment.

In addition to tracking cost-related information for assets and legal documents, use cost records with payments to create payment schedules. The schedules can help you make timely payments and reduce the risk of overpayment.

You can define extended fields for costs and payments. You can also add an extended field that you created for an asset cost to a legal document cost.

For information about costs and payments, see the *User Guide* and *Administration Guide*.

Custom Relationships

Custom relationships are links between two related objects. The relationship describes and provides information about the interdependencies between the objects. Through a custom relationship, you can navigate from one object to another. You can locate, retrieve, and modify information about the objects.

For information about how to create custom relationships, see the *Administration Guide*.

Configuration Usability Improvements

The product configuration has been enhanced in the following ways.

- **Configuration Across All Families**—You can create configurations that span all asset families or legal templates at both the global and role levels. This enhancement helps minimize the number of configurations and makes configurations easier to manage.
- **Exclude an Asset Family**—You can exclude an asset family so that it is not available for users. If you exclude an asset family, a user who creates or modifies a model cannot select that asset family. Also, the excluded asset family is not available for managing filters, data imports, or configurations. For example, if the product is integrated with CA Service Desk Manager, the asset families from CA Service Desk Manager are also available to CA APM users. If you do not require the CA Service Desk Manager asset families, you can exclude them so that they are not available to users.

For information about configuring the product, see the *Administration Guide*.

Product-Provided User Roles

The product provides a System Administrator role, which has complete control and access to all objects and tenant data. The product also provides the following predefined user roles to help you manage users:

- CA APM - Asset Technician
- CA APM - Contract Manager
- CA APM - Default User
- CA APM - Fulfiller
- CA APM - Receiving

For information about user roles, see the *Administration Guide*.

Subgroup Assets

An asset group is a collection of assets that you acquire together and that are based on the same model. You define an asset group in one asset record. The product tracks the asset information for the entire group, rather than for the individual assets. All members of an asset group share asset information.

You can divide an asset group into individual assets when you want to manage assets in the group separately. When you subgroup an asset group, the product removes assets from the group (decreases the group quantity) and creates either one new asset or multiple new assets (depending on your criteria). The product copies the information for the group to the new assets, except Serial Number, Alt Asset ID, Host Name, DNS Name, and MAC Address.

For information about subgrouping assets, see the *User Guide*.

Common Home Page

The common home page, which provides a single web-based home page for accessing the functions in both CA APM and CA SAM, has been enhanced with single sign-on. With single sign-on, you can set parameters that enable you to access CA SAM from the common home page without logging in. For single sign-on, the users must match in CA APM and CA SAM.

For information about common home page single sign-on, see the *Administration Guide*.

Migration

You use data migration to move CA APM data from Release 11.3.4 to Release 12.9. You first install Release 12.9. At the end of the installation, the CA Management Database (CA MDB) structures are updated and you are prompted to migrate your data. The data migration moves the data in your database from the previous database structures to the new database structures.

With this release, you can migrate objects that were not migrated with Release 12.8. These objects are costs and payments extensions and audits, custom relationships and audits, and relationship extensions and audits. With this release, all relationships are migrated, including custom relationships and relationships that were not product-provided. If you previously migrated your data from Release 11.3.4, you can migrate the data for just these objects. You do not need to perform the complete data migration again.

For information about migration, see the *Implementation Guide*.

FIPS Compliance

The Federal Information Processing Standard (FIPS) Publication 140-2 (FIPS PUB 140-2) is a United States government computer security standard that accredits cryptographic modules. The National Institute of Standards and Technology (NIST) issues and maintains the standard. CA APM supports FIPS-compliant techniques for cryptography. CA APM is in compliance with FIPS 140-2 through the use of Microsoft .NET Framework and Triple-DES (certificate ID 1409). These applications use FIPS-compliant algorithms. CA APM enables FIPS from the CA APM servers and also from the CA EEM server.

Removed Features

The following features have been removed from this release:

- User roles can no longer be copied.

Chapter 3: Documentation

This section contains the following topics:

[Documentation Changes](#) (see page 15)

[View the CA Technologies Bookshelf](#) (see page 16)

Documentation Changes

The product documentation has been updated to incorporate release changes and to help you find information faster. Role-based documentation scenarios have been added.

- User Guide
 - Change asset model
 - Change model asset family
 - Costs and payments
 - Subgroup assets
- Administration Guide
 - Configuration usability enhancements
 - Data Importer web client enhancements
 - Data Importer with a command line (scenario)
 - Data Importer with a workflow (scenario)
 - Data Importer with product-provided imports
 - Product-provided user roles
 - Common home page single sign-on
 - Custom relationships
- Implementation Guide
 - New installation wizard
 - Migration enhancements
 - CA APM and CA SAM data synchronization enhancements
 - Data Importer integration with CA Process Automation
- Known Issues are available from the [CA APM product page](#) on CA Support Online.

- CA IT Asset Manager Cookbook
 - Selected CA IT Asset Manager technical content is available on the mobile device platform Flipboard. [Watch this video](#) and use the cookbook today. Happy flipping!
 - To add the CA IT Asset Manager Cookbook to your RSS feed folder, add this URL:
`http://cookbooks.ca.com/caitam/?feed=rss2`
 - To view the CA IT Asset Manager Cookbook in your browser, instead of using a mobile application, access the following URL:
<https://flipboard.com/section/ca-it-asset-manager-cookbook-bfWkzo>

View the CA Technologies Bookshelf

The CA Technologies Bookshelf provides your product documentation set in Section 508-compliant HTML format, and a print version of each guide. The CA Technologies Bookshelf is installed automatically with the product and you can access it by clicking the Bookshelf link in the product.

You can download and extract the CA Technologies Bookshelf for your product (a ZIP file) from CA Support Online.

To extract the ZIP file and view the CA Technologies Bookshelf

1. Use an archive product such as WinZip.
2. Extract the content to a local folder.
3. Double-click the Bookshelf.html file in the Bookshelf folder.

The CA Technologies Bookshelf opens, and you can use it to view and search the product documentation.

Where to Find Documentation

You can access the CA APM documentation in the following locations:

- Click the Bookshelf link in the product.
- The Doc directory on the installation media. Double-click Bookshelf.html.
- Technical Support at <http://ca.com/support>.

How to View and Search PDFs

To view PDF files, download and install the Adobe Reader from the Adobe website if it is not already installed on your computer.

If you open a PDF file in Adobe Reader in the CA Technologies Bookshelf and search, the individual PDF file is searched and you see the individual instances of the search term.

Chapter 4: System Information

This section contains the following topics:

[Operating Systems, Databases, and Web Browsers](#) (see page 19)

[System Requirements](#) (see page 20)

[Additional Product Requirements](#) (see page 21)

[CA Technologies Product Integration Patch Requirements](#) (see page 23)

Operating Systems, Databases, and Web Browsers

The product supports the following operating systems, database management systems, and web browsers. CA Technologies supports each component during its lifecycle (as determined by its manufacturer) or until CA Technologies announces that we no longer support it.

Note: At publication time, the product supports the system and product requirements that are listed in this document. The most current list of system and product requirements is available in the [Compatibility Matrix](#) on CA Support Online.

Note: The CA Business Intelligence installation is limited to Windows operating environments. However, you can integrate CA Business Intelligence with the product on all supported operating environments.

Web Server/Application Server Operating System (OS)

- Windows Server 2008 Standard and Enterprise Edition R2 x64
- Windows Server 2008 Standard and Enterprise Edition SP2 x64
- Windows Server 2012 Standard Edition x64

Note: These Windows Server versions are the minimum levels that are required for compatibility. Subsequent service packs in the same major release level are also supported.

Note: If you are migrating from CA APM Release 11.3.4 and you have Windows Server 2003, upgrade to Windows Server 2008 first.

Database/OS Operating Environment

- Microsoft SQL Server 2008 SP2 Standard and Enterprise Edition x64
- Microsoft SQL Server 2008 R2 Standard and Enterprise Edition x64

- Microsoft SQL Server 2012 Enterprise Edition x64

Note: These Microsoft SQL Server versions are the minimum levels that are required for compatibility. Subsequent service packs in the same major release level are also supported.

Note: Common components are not supported with Microsoft SQL Server 2012 database versions.

- Oracle 11g Release 11.1.x x64
- Oracle 11g Release 11.2.x x64

Note: If you are migrating from CA APM Release 11.3.4 and you have Microsoft SQL Server 2005, upgrade to Microsoft SQL Server 2008 before you migrate.

Web Browser

- Microsoft Internet Explorer 8.0, 9.0, 10.0 on Windows platforms

Note: Launch Internet Explorer 10.0 in Desktop mode with Compatibility mode enabled on a Windows 8 platform. Desktop mode is required for Internet Explorer 10.0 on other Windows platforms.

- Firefox 3 for Open SUSE Linux 11.1
- Firefox 3, 19, 24 for Windows
- Chrome for Windows

System Requirements

The following requirements must be met for the product to install and operate properly. These requirements assume that you have between 80 and 100 concurrent users. A minimum of 4 GB of space is required for the data files directory of the database server for the MDB to install and configure properly.

For assistance with deployment architectures exceeding 100 concurrent users, contact CA Support at <http://ca.com/support>.

Important! CA APM has time-sensitive processes. Verify that all servers are set to their correct date and time with their respective time zones.

Web Server

Hardware	Requirement
Processor	Minimum: 3 GHz (dual core processor)

Hardware	Requirement
Memory	Minimum: 8 GB
Free Disk Space	Minimum: 5 GB

Database Server

Hardware	Requirement
Processor	Minimum: 3 GHz (dual core processor)
Memory	Minimum: 8 GB

Application Server

Hardware	Requirement
Processor	Minimum: 3 GHz (dual core processor)
Memory	Minimum: 8 GB
Free Disk Space	Minimum: 5 GB

Additional Product Requirements

The following additional products requirements must be met for the product to install and operate properly.

Note: At publication time, the product supports the system and product requirements that are listed in this document. The most current list of system and product requirements is available in the [Compatibility Matrix](#) on CA Support Online.

Additional Products Installed

Product	Release
MDB (SQL Server and Oracle)	1.5 build 1
Java Runtime Environment (JRE)	1.7.0_40 (32-bit)
Common Asset Viewer	r11.2 build 1.94 on Apache Tomcat 6

Product	Release
MDAC	2.8
CORA	12.5.0.34
Common Administration for Service Management (CASM)	Apache Tomcat 5
BIAR	16
CA SAM	12.9 (version 3.5.5 P3)
Pentaho Data Integration (Kettle)	4.4
Migration Toolkit	1.0.0.555

Additional Products Required

Product	Release
CA EEM	12.51
CA Business Intelligence Embedded Kit	3.2, 3.3, 3.3 SP1
CA Process Automation (required for CA SAM implementation)	4.0 SP1, 4.1, 4.1 SP1
Acrobat Reader	5.0 (minimum)
JDBC Drivers	SQL Server 2005 = 2.0.1803.100 SQL Server 2008 = 3.0 Oracle = 11.2.0.1.0
Internet Information Server (IIS)	7.0, 7.5, 8.0 (7.5 required for CA SAM implementation)
Microsoft JET Database Engine	4.0 SP5
Microsoft .NET Framework	4.0
Microsoft .NET Features	3.5 for Windows Server 2012
Windows Installer	5.0
Java Development Kit (JDK)	1.7.0_40 (32 bit)

Additional Products and Standards Supported

Product	Release
CA SiteMinder	12.51
CA Client Automation	12.5 SP1
CA CMDB	12.6, 12.7
CA Service Desk Manager	12.5, 12.6, 12.7, 12.9
CA Service Catalog	12.6 SP2, 12.7, 12.8, 12.9 (Completion of Release 12.9 certification is planned for shortly after General Availability.)
Section 508 Compliance (Level 1)	JAWS 13.0
Federal Information Processing Standard (FIPS)	PUB 140-2

Note: Before you start the CA Business Intelligence or CA Process Automation installation, review the requirements in the CA Business Intelligence and CA Process Automation product documentation.

CA Technologies Product Integration Patch Requirements

To integrate CA Client Automation Release 12.5 with CA APM Release 12.9, download and install CA Client Automation and the latest patches (TF9B008 and TF9B004, or their published equivalent) on CA Support Online.

Chapter 5: Known Issues

To see the known issues for this release of CA APM, complete the following steps:

1. Log in to CA Support Online.
2. Go to the CA Asset Portfolio Management product support page.
3. Scroll to the Product Status area.

Appendix A: Accessibility Features

CA Technologies is committed to helping all customers, regardless of their ability, to use its products and supporting documentation to accomplish vital business tasks. This section outlines the accessibility features that are part of CA APM.

This section contains the following topics:

[Product Enhancements](#) (see page 27)

Product Enhancements

CA APM offers accessibility enhancements in the following areas:

- Display
- Sound
- Keyboard
- Mouse

Note: The following information applies to Windows-based and Macintosh-based applications. Java applications processed on many host operating systems, some of which already have assistive technologies available to them. For these existing assistive technologies to provide access to programs written in JPL, they need a bridge between themselves in their native environments and the Java Accessibility support that is available from within the Java virtual machine (or Java VM). This bridge has one end in the Java VM and the other on the native operating environment, so it will be slightly different for each operating environment it bridges to. Sun is currently developing both the JPL and the Win32 sides of this bridge.

Display

To increase visibility on your computer display, you can adjust the following options:

Font style, color, and size of items

Lets you select font color, size, and other visual combinations.

Screen resolution

Lets you change the pixel count to enlarge objects on the screen.

Cursor width and blink rate

Lets you make the cursor easier to find or minimize blinking.

Icon size

Lets you make icons larger for visibility or smaller for increased screen space.

High contrast schemes

Lets you select color combinations that are easier to see.

Sound

Use sound as a visual alternative or to make computer sounds easier to hear or distinguish by adjusting the following options:

Volume

Lets you turn the computer sound up or down.

Text-to-Speech

Lets you hear command options and text read aloud.

Warnings

Lets you display visual warnings.

Notices

Gives you aural or visual cues when accessibility features are turned on or off.

Schemes

Lets you associate computer sounds with specific system events.

Captions

Lets you display captions for speech and sounds.

Keyboard

You can make the following keyboard adjustments:

Repeat Rate

Lets you set how quickly a character repeats when a key is struck.

Tones

Lets you hear tones when pressing certain keys.

Sticky Keys

Lets those who type with one hand or finger select alternative keyboard layouts.

Mouse

You can use the following options to make your mouse faster and easier to use:

Click Speed

Lets you select how fast to click the mouse button to make a selection.

Click Lock

Lets you highlight or drag without holding down the mouse button.

Reverse Action

Lets you reverse the functions controlled by the left and right mouse keys.

Blink Rate

Lets you select how fast the cursor blinks or if it blinks at all.

Pointer Options

Lets you complete the following tasks:

- Hide the pointer while typing
- Show the location of the pointer
- Set the speed that the pointer moves on the screen
- Select the pointer's size and color for increased visibility
- Move the pointer to a default location in a dialog box

Keyboard Shortcuts

The following table lists the keyboard shortcuts that CA APM supports:

Keyboard	Description
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+K	Find Next
Ctrl+F	Find and Replace
Ctrl+V	Paste
Ctrl+S	Save
Ctrl+Shift+S	Save All
Ctrl+D	Delete Line
Ctrl+Right	Next Word
Ctrl+Down	Scroll Line Down

Keyboard	Description
End	Line End

Appendix B: Third-Party Acknowledgements

The license information for third-party utilities and software that CA APM uses is available in the \Bookshelf Files\TPSA folder of the CA Technologies Bookshelf.

You can open the license information on the CA Technologies Bookshelf. Click the View TXT link next to Third-Party Acknowledgments.