Micro Focus Connect 3.0

Using Micro Focus Connect

2018-01-25

Contents

Getting Started

This topic describes how to start the Micro Focus Connect UI, and it provides an overview of the Micro Focus Connect dashboard and how it is used to configure data sources and connections, and how to run and manage synchronizations.

Starting the UI

Before starting the Micro Focus Connect UI, the Micro Focus Connect server must be running. See *Running the Micro Focus Connect Server* for more information.

1. Go to `http://<machine name>/ConnectWeb`. The default port is `80`. The Micro Focus Connect login page, **Micro Focus Connect**, appears.

2. In the **Username** and **Password** fields, enter your credentials and then click **Login**. The Micro Focus Connect UI appears.

   For the first login, optionally use the **Default Authenticator**. Username: `Administrator` and Password: `Administrator`. After setting up other authenticators, you can login under another authenticator with your username and password.

   📝 **Note:** User name and password are case sensitive.

3. Select an **Authenticator** from the list.

Logging Out

Click the **Log out** button ( ).

📝 **Note:** Logging out has no effect on the Micro Focus Connect server.

The Dashboard

The main page of the Micro Focus Connect UI is referred to as the *dashboard*. The dashboard consists of four main pages that are accessed via tabs:

Connections   Displays a list of your installed connections and a summary of their synchronization attributes -- the connection's data source, the direction in which assets are synchronized (the default is *bi-directional*), the last time a synchronization was run, the last time a synchronization succeeded, and the current status (which can refer to either the synchronization task itself, or to the configuration that defines it).

The **Connection Details** panel shows detailed information about the currently selected connection, including information about how projects, types, fields, and relationships are mapped between your third-party system and the Atlas Hub.

Data Sources   Displays a list of currently defined data sources. A **Data Source Details** panel shows detailed information for the currently selected data source. The information displayed on this panel varies based on the data source. You can also use this page to create and edit data sources.

User Maps	User maps define users that have different user names across multiple datasources. For example, a user may be `User1` in one datasource and `User 1` in another. User maps allow you to map these two users together so that Micro Focus Connect knows they are the same user.
Authenticators	Displays a list of configured Authenticators and available Data Sources. Authenticators are used to enforce which product's users are allowed to log in. A default authenticator is installed with the following credentials: user (Administrator) , password (Administrator). Both, user and password are case sensitive.

The Dashboard Toolbar

The Micro Focus Connect dashboard toolbar contains icons that:

Log out of the UI. (Logging out has no effect on the Micro Focus Connect server).

Access the **Settings** dialog box, from which you can configure general system settings such as resources and error notification. Additionally, you can access **Import** and **Export**, where you can import and export data sources, synchronization, and user maps.

Access help for Micro Focus Connect by clicking *Using Micro Focus Connect* guide, or view the *About Micro Focus Connect* dialog to view the version that you are using.

What to Do Next

Configure general system settings, as described in *Setting Synchronization Resources* and *Email Settings*.

Starting and Stopping Connections

A connection needs to be fully defined before you can start it.

Tip: Micro Focus Connect attempts to run a connection once it is defined. You can see a connection's status on the Micro Focus Connect dashboard.

- To start a connection, click its **Options** button ( ) on the dashboard and choose **Start Connection** from the menu.
- To stop a connection, click its **Options** button ( ) on the dashboard and choose **Stop Connection** from the menu.

Connection Status Values

The **Connections** page contains a grid listing each of your connections. One of the columns in the grid is **Status**. The following are the available **Status** values:

Disabled	The user-configurable value of `Enabled` in `Connect.xml` is `false`.
Failed	One or more sync-sets associated with this synchronization have failed and no subsequent iterations have succeeded. See the `Running` status for an example.
Idle	There are no projects to synchronize or the `projectMaps` are disabled.
Restarting	The application is re-reading the configuration file (`Connect.xml`) and is restarting the synchronization. When the sync is complete, the status will change to `Running` or `Failed`.

Running	The status will be `Running` when the last available status for all sync-sets is `Success`.
	For example: A synchronization has three sync-sets (`ss1`, `ss2`, `ss3`):

```
Case 1 RUNNING:
   Iteration 2: ss1=success, ss2=success, ss3=success
   Iteration 3: ss1=ongoing

Case 2 FAILED
   Iteration 2: ss1=failed, ss2=success, ss3=success
   Iteration 3: ss1=ongoing

Case 3 RUNNING:
   Iteration 2: ss1=failed, ss2=success, ss3=success
   Iteration 3: ss1=success, ss2=ongoing
```

Server Reinitializing	The application is reinitializing after changes to the configuration file. This status will display for all connections until the application has re-read the configuration file and created the associated sync-sets.
Unknown	The synchronization status is not known to the application. There is an error.

High Watermarks

High Watermarks allow Micro Focus Connect to know what has previously been synchronized. It's acts as a time and place marker so that Micro Focus Connect compares what has been updated, added, deleted, and etc. after the High Watermark was made.

Micro Focus Connect manages the High Watermarks. For example, after a synchronization iteration completes, Micro Focus Connect moves the High Watermarks forward in time.

At times, you may want to reset the High Watermarks. For example, if you have been synchronizing for an extended period of time and decide that you need to change some of the configured mappings.

To reset the High Watermarks, click a connections **Options** button (⚙) on the dashboard and choose Clear Watermarks from the menu.

Resetting the High Watermarks ensures all items get back in sync.

Setting Synchronization Resources

Use this procedure to specify values that Micro Focus Connect uses when synchronizing assets.

1. Click the **Actions** button (⚙) and select **Settings**. The **Global Settings** screen appears.
2. Use the **Sync Settings** group, type a number to specify the time in minutes between synchronizations. The default is 30 minutes.
3. Click **Save** to save your changes.

   🖊 **Note:** The system may support on-demand synchronizations. For configured on-demand synchronization rules, the frequency value defined here has no meaning.

Setting Up Error Notification

Micro Focus Connect can generate email messages when system and synchronization errors occur. You specify default values for settings that are used by both types of errors on the **Error Notification** tab of the **Settings** dialog box: your SMTP server settings, who you want to receive error notification email, and how

often. If you want, you can override email settings on an individual connection basis as described in
Creating a Connection.

1. Click the **Actions** button () and select **Settings**. The **Global Settings** screen appears.
2. In the **SMTP Configuration** and **Email Settings** groups, complete the fields as described below.
3. When you are done, click **Save** to save your changes.

SMTP Configuration	Use these fields to specify information needed to identify and connect to your SMTP server.	
	Host	The email system's host name.
	Port	The email system's port number.
	Login Name	The email user.
	Password	The password for the email user.
	From Address	The email address from which notification emails will be sent.
Email Settings	Use these fields to specify email recipients and how often you want Micro Focus Connect to send error notification email.	
	Send Email To	Email addresses for the users you want to receive error notification email. Separate addresses with a semicolon (;).
	Frequency	The frequency with which you want Micro Focus Connect to send error notification email. The default is 60 minutes.

Refreshing Server Data

The Refresh Server Data option clears out cached data that has been obtained from connectors.

Micro Focus Connect caches data to improve performance.

Data that is cached:

- Property enumerations
- Property lists
- Type property lists
- Type lists
- Project lists

To refresh server data, click on the dashboard and choose **Refresh Server Data** from the menu.

Charts

Charts track volume, changes, and errors. Each item is denoted by a specific colored line:

- Green: denotes volume, indicating the quantity of items read.
- Blue: denotes changes, indicating the quantity of items modified.
- Red: denotes errors, indicating failed changes.

Hover over the a data point to view detailed information.

Iteration: 2
Started on: 11/8/2017, 12:41:42 PM
Changes: 25
Adds: 6
Queued Adds: 0
Updates: 6
Deletes: 13
Queued Deletes: 0
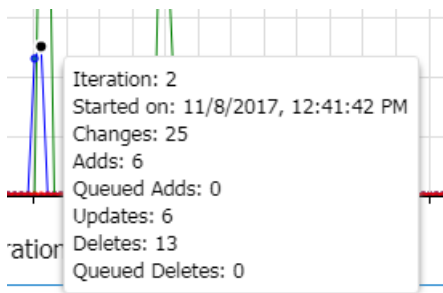
Quick Glance Charts

Quick glance charts are not associated with specific connections. These charts display data across all connections. To refresh the data, click the grid refresh button.

Activity Volume

Displays activity across all connections.
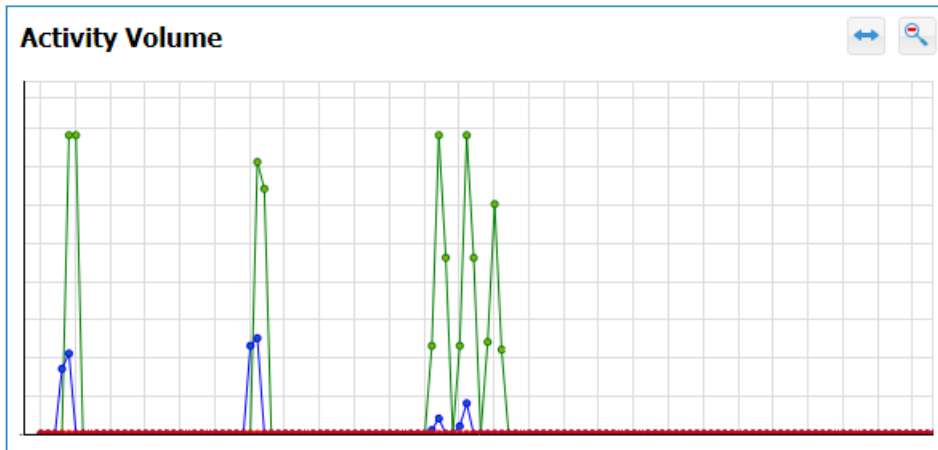
Most Active Connections

Displays the connection that has the most activity.
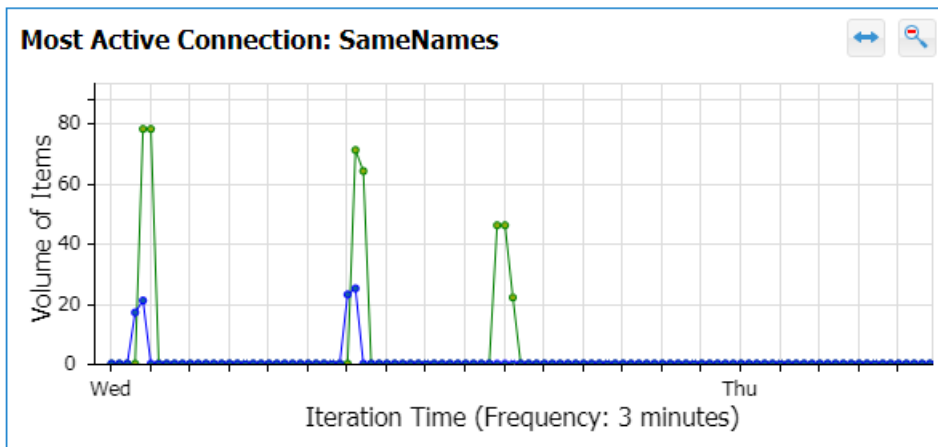
Most Active Type

Displays the type that has the most activity.

Most Active Type: Connection: SameNames, Project: SameName, Type: ChangeRequest
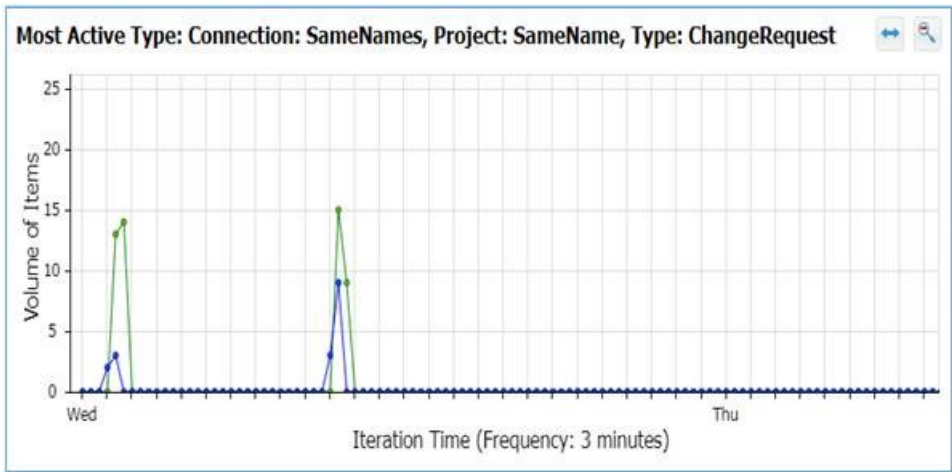
Connection Charts

Connection charts display data pertinent to the selected connection. On the dashboard, select a conenction, and click the **Charts** tab. To refresh the charts, click the connection.

Activity Volume

Displays the activity of the selected connection.

Activity Volume
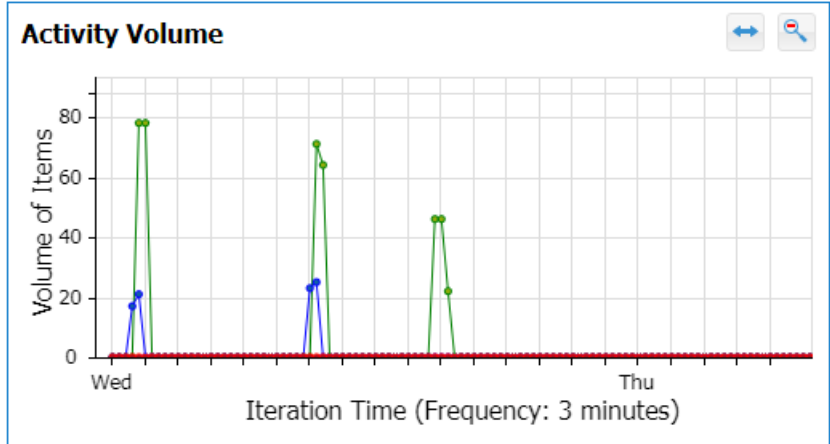
Iteration Duration

Displays how long (in seconds) each iteration takes.

Iteration Duration
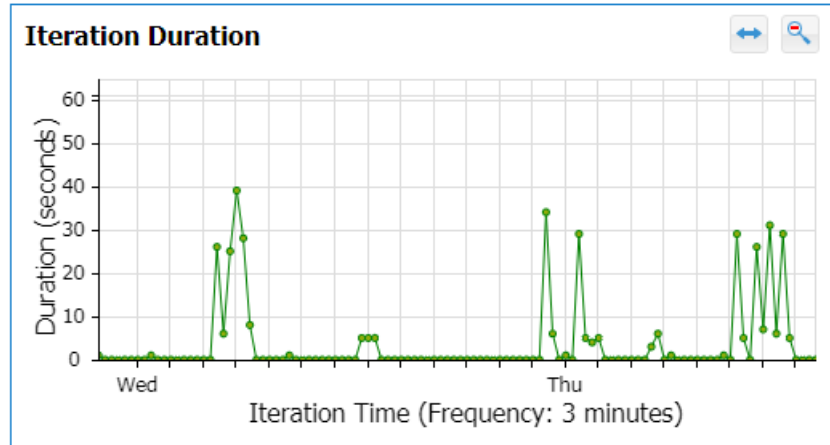
Project Changes

Displays the changes for the selected project and type. If a type is not selected, then it displays changes for all types.
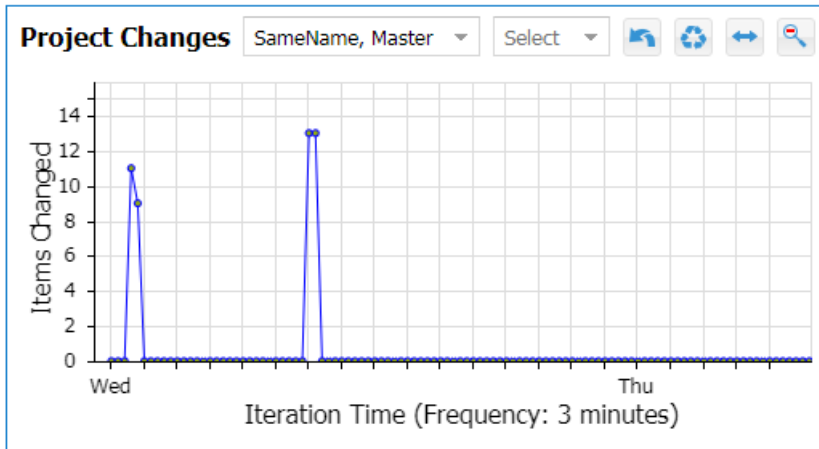
Creating a Data Source

This topic describes how to use the Micro Focus Connect UI to:

- Create a data source.
- Enter the data source connection details.
- Test the connection to the data source.
- Add types from the data source that you want to use.

Tip: You need a data source in order to fully define a connection.

1. On the Micro Focus Connect dashboard, click the **Data Sources** tab.
2. Above the **Data Sources** list, click **Create New Data Source**.
3. On the dialog box that opens, complete the **Name** and **Product** fields:

   New Data Source Name
   Enter a unique name for your data source.

   Data Source Product
   The products that are available in the list are the connectors that were added with the product installation or the ones that you downloaded from our community and installed yourself.

4. Click **Add Data Source**.

   Your data source is added to the list of data sources. Select it to edit it. The data source pane is refreshed with additional fields that are specific to that product. Refer to the `Readme.html` file that was installed with your connector for more information on these fields.

5. Click the **Save Changes** button.

   Note: The bottom pane already displays a Type with the name `ChangeSet`. There is no need to make any changes within this pane.

Creating a Connection

In Micro Focus Connect, a *connection* represents the relationship between two data sources. You use the connection:

- To identify the data source whose assets you plan to synchronize.
- To specify the asset types, fields, and relationships you want to synchronize.
- To specify the projects you want to synchronize.

You perform these tasks using the **Create Connection Wizard**.

> ✎ **Note:** The data sources you want to use for a connection must exist before you can complete a connection. See *Creating a Data Source* for more information.

1. From the **Connections** tab on the dashboard, click the **Add Connection** button. The **Create Connection Wizard** appears.
2. On the **Data Source** tab, enter a name in the **Connection Name** field.
3. In the **Master Name** field, select a data source to use as the master data source.

   The *Master* designation is used to determine conflict resolution that do not merge content or cannot resolve conflict through other means. For data sources that do not merge content, the master designation determines which connector changes are applied when changes are seen from both data sources.
4. In the **Target Name** field, select a data source to use as the target data source.
5. Optionally, use the fields in the **Error Notification** group to override error notification email settings specified in **Settings**:

   - Enter email addresses (separated by a semicolon (;)) in the **Send Email To** field.
   - Change the value in the **Frequency** field.

   > 💡 **Tip:** Email addresses and frequency values established on the **Settings** page are not displayed here.
6. Click the **Next** button if you want to define types and fields you want to synchronize now. The **Types and Fields** tab appears. See *Adding Types to Connections* for more information. Otherwise, click the **Save** button to save the connection.

   > ✎ **Note:** If you save the connection at this point, note that it is incomplete.

Adding Types to a Connection

A *type* is a system asset such as a task, topic, change request, or story. When creating a connection, you must add at least one type to synchronize between your source and target. For example, you may want to map a CA Agile Central *Hierarchical Requirement* to an Atlas Hub *Story*.

> ⚠ **Important:** The types that are available to add to a connection are limited to the types that you added to your data source. If the type that you want is not listed, return to the **Data Sources** tab and add the type to the data source. See *Creating a Data Source* for more information.

1. If you are in the process of creating a connection, navigate to the **Types and Fields** tab. If you are editing an existing connection, on the dashboard, click **Options** button (⊡) and choose **Edit** from the menu. Navigate to the **Types and Fields** tab.
2. Select a direction for data synchronization from the **Default Sync Direction** list. All synchronizations will be performed in this direction unless you choose to override it. Values for synchronization direction are:

From Master	Data is only synchronized from the Master to the Target.
To Master	Data is only synchronized to Master from the Target.
Bi-Directional	Data is synchronized both to and from the Master and Target. (This is the default.)

3. Click **Auto Type Mapping** to have the connection's types and fields automatically mapped, or click **Add Type Mapping** and perform the remaining steps to manually map types.

    If auto type mapping, all types defined by the selected data sources will be mapped. Fields are auto mapped for each type that is exposed by the data source.

4. Click the **Add Type Mapping** button. The **Add Type Mapping** dialog box appears.

5. The **Target Type** list contains all the types that you added to your Target data source. Select a type from the list.

    💡 **Tip:** Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

6. The **Master Type** list contains all the types available in the Master data source. Select the type you want to map.

7. Click **Add Field Mapping**. You use the controls that appear to choose the fields for the type you are synchronizing that you want to map.

    a) Select a field to map.
    b) Select the synchronization direction in the **Direction** list for each field.
    c) The **HTML Conversion** list allows you to choose if your HTML-based fields should be converted to plain text or vice-versa. Select either **No Conversion**, **From Master**, or **To Master**.
    d) Select the Master field to map to your field.
    e) If you have created user maps and you are currently mapping a user-based field, click the **Enable User Map** option.

    💡 **Tip:** If the fields you are synchronizing use different values, you will want to create a value map. See *Adding Value Maps to Types* for more information.

8. Click the **OK** button to save your mappings and close the **Add Type Mapping** dialog box, or click the **Relationships** tab to specify the relationships you want to synchronize as described in *Adding Relationships to Types*.

Changing Duplicate Link IDs

After editing or creating a connection and clicking **Save**, Micro Focus Connect checks the link ID for each hub-project-type-project and compares it to the link ID used for the same hub-project with other type-projects. If it is the same, "The link ids your using in this connection are the same as those used in another connection. Are you sure you want to do this?" message appears. Clicking **Yes** saves. Clicking **No** doesn't save, allowing you to go back and edit as needed.

1. Navigate to the Type specified

2. Select a different **Field Storing ID of Other Side**.

    If a proper Field does not exist, create a custom property in the repository for this use.

Specifying Synchronization Criteria

You have the option to specify criteria that Micro Focus Connect will use to restrict synchronization to a certain subset of the type. You do this by selecting a type from your data source and creating a query to specify the values you want that type to match in order to be synchronized. You can use AND or OR operators to define as many query clauses as needed.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box, click the **<system name> Sync Criteria** tab.

    💡 **Tip:** Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

2. Click ⤙ (Add Child Criteria). The **Add Term** dialog box opens.

3. Select the data source property from the **Property Name** list. For example: `Blocked`.

    💡 **Tip:** If your data source does not provide a list of property names, you can type it in this field.

4. Select an operator from the **Operator** list. For example: `equals`.

Option	Description
Equals	The property equals the value.
Contained in String	The property contains a part of the value.
Starts With	The property starts with a specified letter or number.
Ends With	The property name ends with a specified letter or number.
Contained in Set	The property is contained within a set.
Includes	The property includes the value. NOTE: The value is a set of names.
Greater Than	The property is larger in number than the value.
Less Than	The property is smaller than the value.
Greater Than Or Equals	The property is larger or equal to the value.
Less Than Or Equals	The property is smaller than or equal to the value.
Is Descendant Of	Use for items contained in an hierarchical tree, such as Stories and Requirements. For example: `WorkProduct->Is Descendant Of Story.12`, where 12 is the unique Story ID number. Also in this example is the feature of setting the criteria property as a chain. Use `->` to indicate the property is connected by the synch criteria as either `Is Decendant of` or `Instance Of`. You can use either the Type Name and ID or just the ID. Separate the Type Name and ID with a `.`.
Instance Of	Use with Property or Type Name. For example: `WorkProduct->Instance Of Story`.

5. In the **Property Value** column, enter the value that the field must contain in order to be synchronized. For example: `True`.

6. Optionally, double-click another row to specify synchronization criteria for another field.

7. Optionally, use one of the following to build your query:

Option	Description
⤙	Adds child criteria.
⑂	Adds a child **And Or** node.
✎	Opens the edit mode to update criteria.
🗑	Deletes the selected criteria.

8. Click **OK** to save your changes.

Modifying Advanced Values for Types

You use the **Advanced** tab of the **Type Mapping** dialog box to specify the names of the fields in your Master and Target systems that are used to store the unique ID of the types you are synchronizing -- if you are synchronizing stories and defects, you would enter the names of those fields here, for example.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box of the **Create Connection Wizard**, click the **Advanced** tab.

   If you are editing an existing connection, click the **Edit** button ( ) on the **Types and Fields** tab of the **Update Connection** window, and then click the **Advanced** tab.

2. Enter the names of the fields used to store the IDs of the types you are synchronizing. You must specify at least one of the type ID fields.

3. Click **OK**.

Adding Projects to a Connection

The last step of defining a connection is to map the projects from your Target to the projects in the Master.

1. If you are in the process of creating a connection, navigate to the **Projects** tab in the **Create Connection Wizard**. If you are editing an existing connection, on the dashboard, click **Options** button ( ) and choose **Edit** from the menu. Navigate to the **Projects** tab of the **Update Connection** window.

2. Click the **Add** button. A new row is added to the list.

3. Select the project you want to map from the **Target** list.

   💡 **Tip:** Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

4. Select the corresponding Master project from the **Master Project** list.

5. Project synchronizations are enabled by default. If you wish to disable it, clear the check box.

6. Some data sources for SCM tools (like Git and Subversion) allow you to specify a deeper directory level synchronization. If it's available and you want to specify a directory deeper than the root directory for synchronization, click the directory button ( ) .

   The **Set Project Path** dialog box opens.

   For each data source, enter the path in the fields provided.

   Click the **OK** button to close the **Set Project Path** dialog box.

7. Once you have added all projects you want to synchronize, click the **Save** button to save your changes.

Moving Data from One Third-Party Tool to Another Third-Party Tool

In some situations, you may want to move data from one third-party tool into another third-party tool. Micro Focus Connect makes moving information easy. However, there are some caveats you must follow so you don't overwrite data.

StarTeam uses custom properties for third-party tools to identify data that Micro Focus Connect moves from application to application. For example, Rally Stories will have an `ExternalID` and an `ExternalURL`. When connecting this information to another third-party tool, that second tool could use the same custom properties. To avoid overwriting this data, create new custom properties for the second third-

party tool. For example, if your second third-party tool is Silk Central Test Manager, name the external ID, `SCTMExternalID`, and name the external URL, `SCTMExternalURL`.

Refer to StarTeam Server help for details on how to create custom properties.

User Maps

User maps define users that have different user names across multiple datasources. For example, a user may be `User1` in one datasource and `User 1` in another. User maps allow you to map these two users together so that Micro Focus Connect knows they are the same user. Use the following sections to learn how to create a user map and then to turn it on at a field level.

Creating User Maps

1. On the main Micro Focus Connect UI, click the **User Maps** tab.
2. Click **Add User Map**. A row is added to the list.
3. Double click the `User Map` text in the **Name** field.
4. Rename the user map. This value is only used in Micro Focus Connect and can be whatever you want it to be.
5. In the user map row, click ⊕ (**Add**). A new `user name` row is added as a child to the user map.
6. In the **Datasource** column, double click the new row to enable the list. Select the proper datasource for the user.
7. Double click the `User name` text in the **Name** field and type in the user name as it exists in that datasource.
8. Follow the same steps to add additional users/datasources to the user map.

Enabling User Maps

If you have created user maps, you still need to turn them on for the user fields.

1. Click the **Connections** tab.
2. Double-click a connection to open it.
3. Click **Next** to Navigate to the **Types and Fields** tab.
4. Select a type and click ✎ (**Edit**).
5. For each user-based field in the list, put a check in the **Enable User Map** column.

Import and Export

Use import and export to move data sources, synchronizations, and user maps between installations.

Exporting Data

Export data sources, synchronizations, and user maps to share across installations. When you export, you create an .xml file that can be imported into another installation.

1. Click and select **Export** from the menu. The **Export Connect Data** dialog box opens.
2. Navigate through the tabs and select the data you want to export.
3. Click **Export**.

Importing Data

1. Click and select **Import** from the menu. The **Import Connect Data** dialog box opens.
2. Click **Select** and navigate to the XML file to import.
3. Opionally, check **Overwrite existing elements**. If **Overwrite existing elements** is checked, the import will replace any existing element in the current `Connect.xml` with the imported one.
4. Click **Import**.

Glossary

This glossary lists terms used throughout the *Using Micro Focus Connect* guide.

Term	Definition
Connection	The configuration that permits synchronization of specific assets.
Connector	Java library that interacts with a third-party repository (CA Agile Central, for example) to perform synchronizations.
Connector type	The name of the third-party repository that a connector interacts with.
Custom Connector	A connector developed using the Java API installed with Micro Focus Connect.
Data source	A specific instance of a connector (CA Agile Central running on a specific server, for example).
Synchronization	The process of synchronizing assets (typically bi-directionally) between a third-party repository (CA Agile Central, for example) and the Atlas Hub.

Updates and SupportLine

Our Web site gives up-to-date details of contact numbers and addresses.

Contacting Micro Focus

Micro Focus is committed to providing world-class technical support and consulting services. Micro Focus provides worldwide support, delivering timely, reliable service to ensure every customer's business success.

All customers who are under a maintenance and support contract, as well as prospective customers who are evaluating products, are eligible for customer support. Our highly trained staff respond to your requests as quickly and professionally as possible.

Visit *http://supportline.microfocus.com/assistedservices.asp* to communicate directly with Micro Focus SupportLine to resolve your issues, or email supportline@microfocus.com.

Visit Micro Focus SupportLine at *http://supportline.microfocus.com* for up-to-date support news and access to other support information. First time users may be required to register to the site.

Information Needed by Micro Focus SupportLine

When contacting Micro Focus SupportLine, please include the following information if possible. The more information you can give, the better Micro Focus SupportLine can help you.

- The name and version number of all products that you think might be causing an issue.
- Your computer make and model.
- System information such as operating system name and version, processors, and memory details.
- Any detailed description of the issue, including steps to reproduce the issue.
- Exact wording of any error messages involved.
- Your serial number.

To find out these numbers, look in the subject line and body of your Electronic Product Delivery Notice email that you received from Micro Focus.

Creating a Dump File

If reporting a protection violation you might be asked to provide a dump (.dmp) file. To produce a dump file you use the Unexpected Error dialog box that is displayed when a protection violation occurs. Unless requested by Micro Focus SupportLine, leave the dump setting as `Normal` (recommended), click **Dump**, then specify a location and name for the dump file. Once the dump file has been written you can email it to Micro Focus SupportLine

You may also be asked to provide a log file created by the Consolidated Tracing Facility (CTF) - a tracing infrastructure that enables you to quickly and easily produce diagnostic information detailing the operation of a number of Micro Focus software components.

Creating Debug Files

If you encounter an error when compiling a program that requires you to contact Micro Focus SupportLine, your support representative might request that you provide additional debug files (as well as source and data files) to help us determine the cause of the problem. If so, they will advise you how to create them.

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