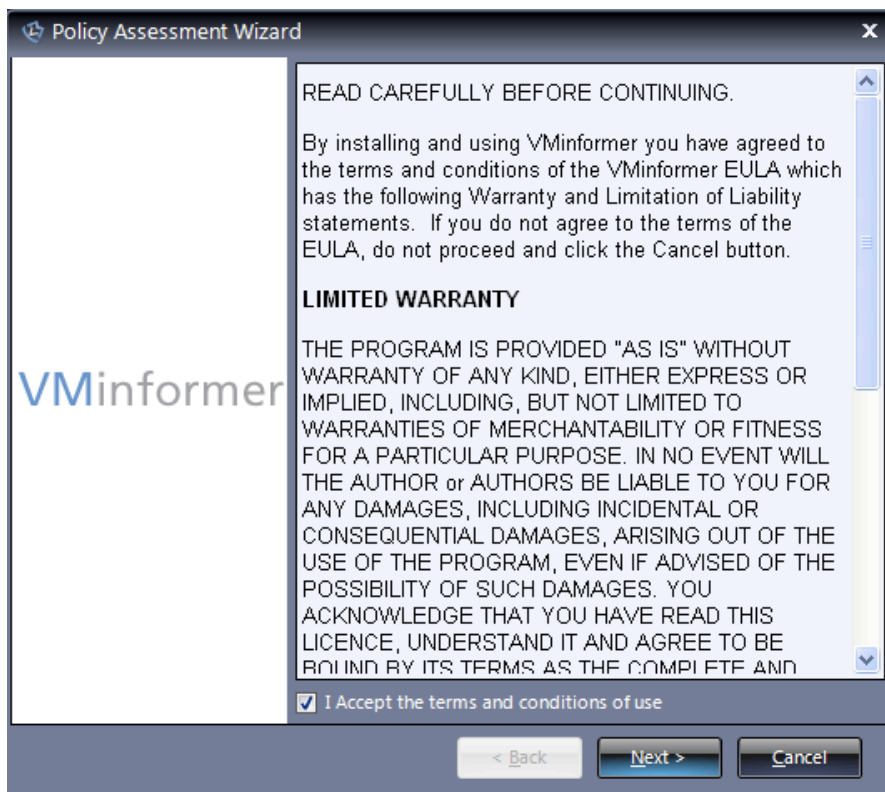


## FAQ - Policy Assessment Wizard

This FAQ guides you through the Policy Assessment Wizard.

### Step 1



When the Application starts it automatically starts the Policy Assessment Wizard. Alternatively you can start this wizard from the File Menu by selecting New.

Make sure you tick the check box to “accept the terms and conditions of use”.

Then Select Next.



## Step 2

A screenshot of a software window titled 'Policy Assessment Wizard'. The window has a dark blue header bar with a close button (X) on the right. Below the header, the text 'Connection Information' is displayed, followed by the instruction 'Specify information to connect to a VMware environment'. The main area of the window is a light blue-grey color and contains three text input fields labeled 'Server:', 'Username:', and 'Password:'. Below these fields is a checkbox labeled 'Connect using SSL' which is checked. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Enter the name or IP address of your Virtual Center or ESX host in the “Server” field in the screen show above.

The username field is for a “non-root” account only, **do not enter root user** credentials here at all.

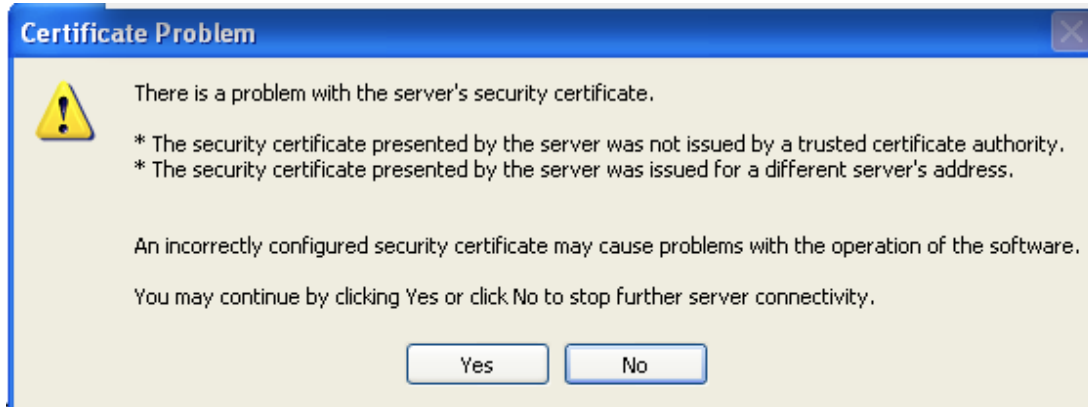
The password field is for the user account that you entered previously.

Make sure that you are connecting using SSL (selected by default).

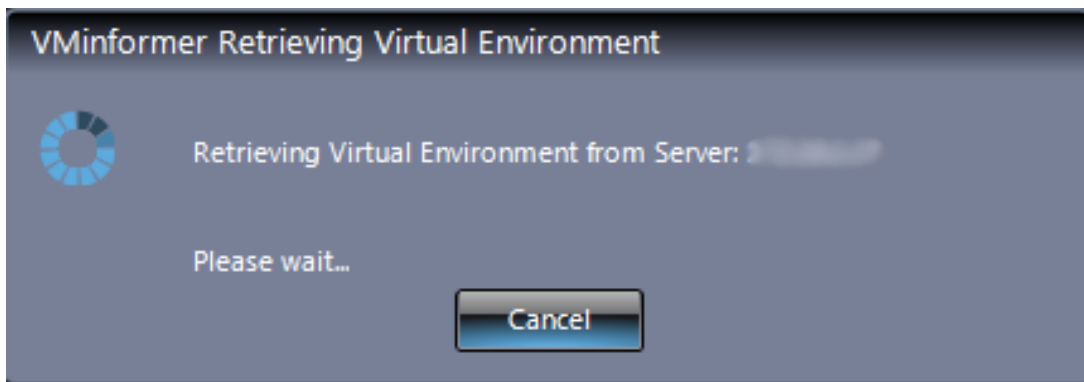
When you have finished select Next.



### Step 3

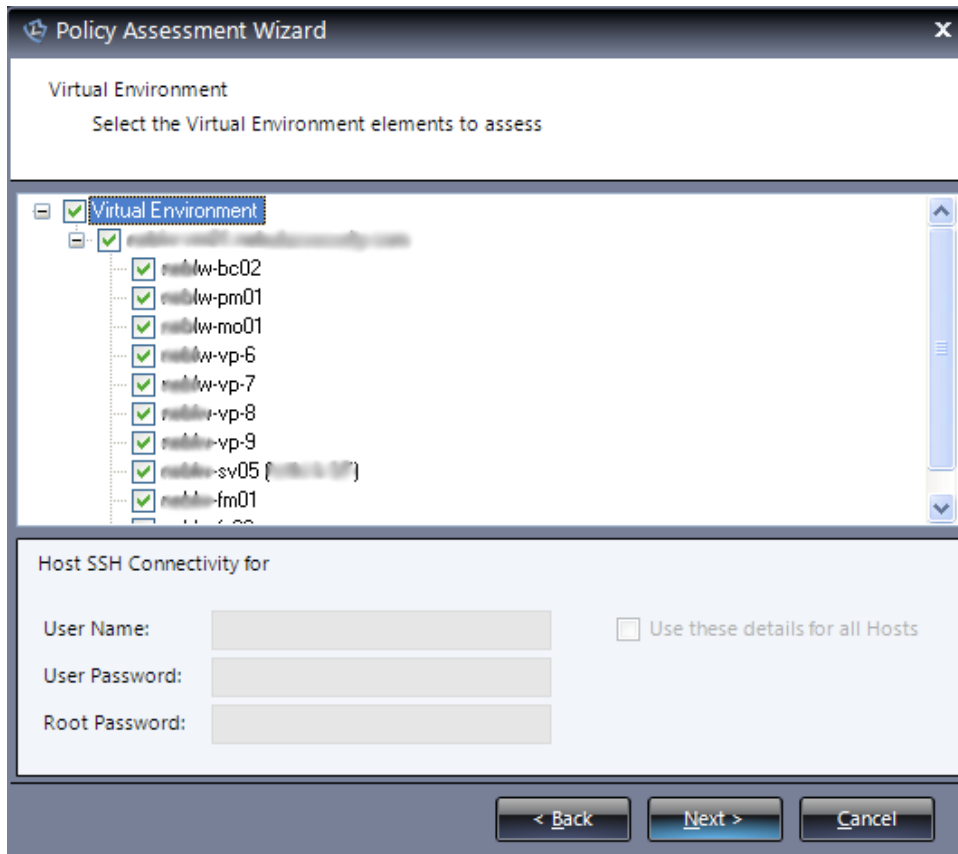


After selecting next from step 2 the tool will connect to your ESX host or VC. Once it has successfully connected you will get a "Certificate Problem" warning screen. This is normal if you have not setup trusted keys so just select YES. You can turn this warning off in future from the Tools / Options menu within the tool or by setting up trusted keys. (refer to VMware documentation on how to do this)



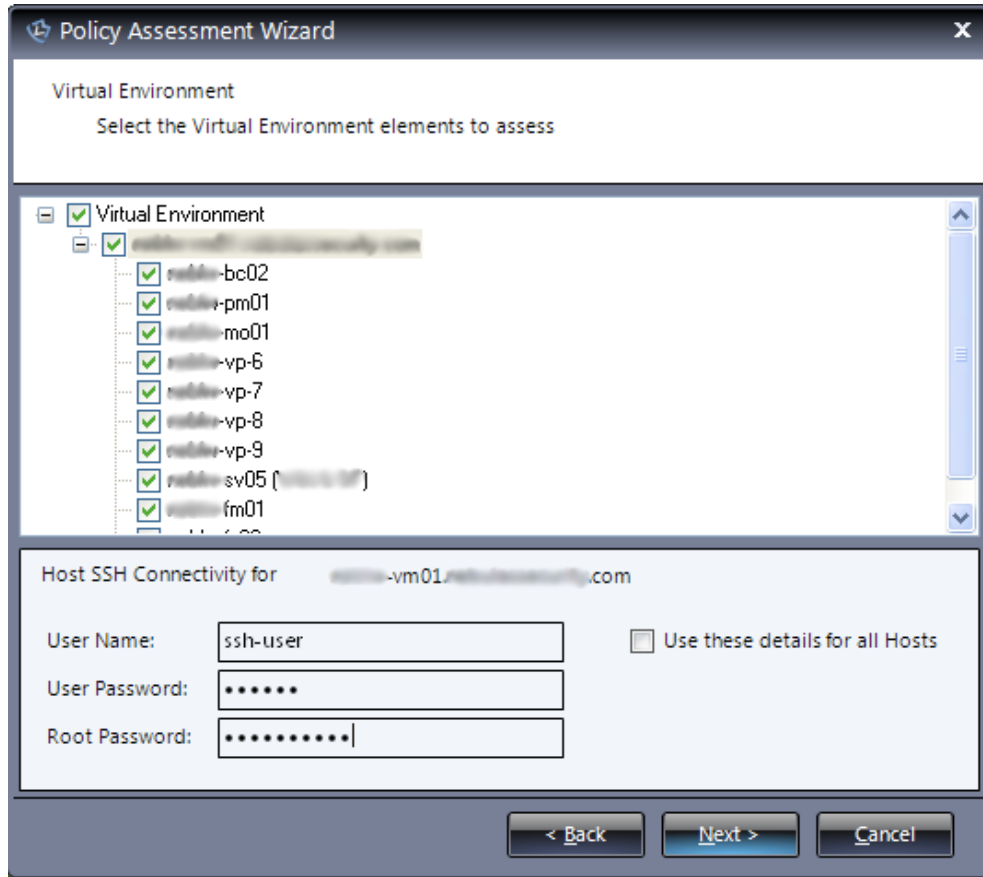
After Selecting 'Yes' you will see the screen shown above.

## Step 4



The next step in the process is to select and highlight with the mouse, your ESX host which will be shown in the object tree as seen above. It will be the entry immediately below the Virtual Environment folder.

The next screenshot will show this. ***Please note that until you do this you will not be able to enter any SSH credentials in the “SSH window” underneath the object tree.***



Policy Assessment Wizard

Virtual Environment  
Select the Virtual Environment elements to assess

Virtual Environment

- Virtual Environment
  - [redacted]
  - vm01-bc02
  - vm01-pm01
  - vm01-mo01
  - vm01-vm01-01
  - vm01-vm01-02
  - vm01-vm01-03
  - vm01-vm01-04
  - vm01-vm01-05
  - vm01-vm01-06
  - vm01-vm01-07
  - vm01-vm01-08
  - vm01-vm01-09
  - vm01-sv05 ( [redacted] )
  - vm01-fm01

Host SSH Connectivity for [redacted]-vm01.[redacted].com

User Name:   Use these details for all Hosts

User Password:

Root Password:

< Back Next > Cancel

Once you have selected and highlighted your ESX host with the mouse then you will be able to enter your SSH credentials.

The “User Name” field is a non-root user account, please DO NOT use this field for the root username.

The Field immediately below this is for the password of the non-root account.

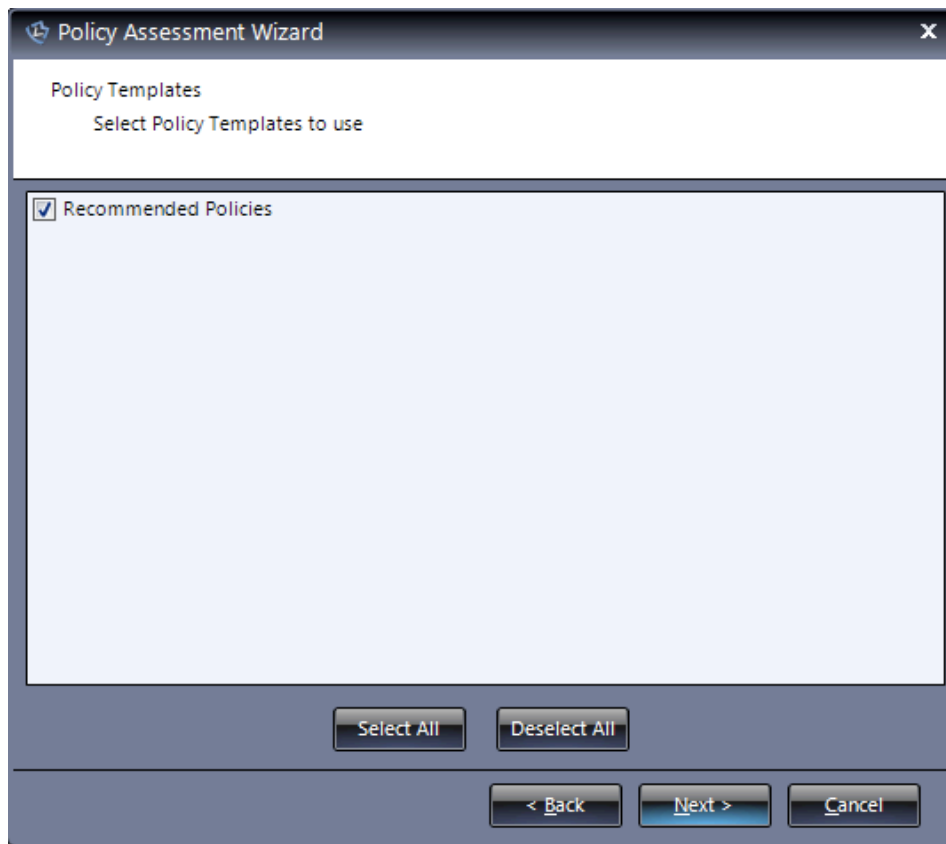
The last field named “Root Password” is your root account password.

If all ESX hosts use the same password then make sure you select the checkbox “use these details for all hosts”.



If you are using different credentials for each ESX host then you will need to select each ESX host in turn and enter the credentials.

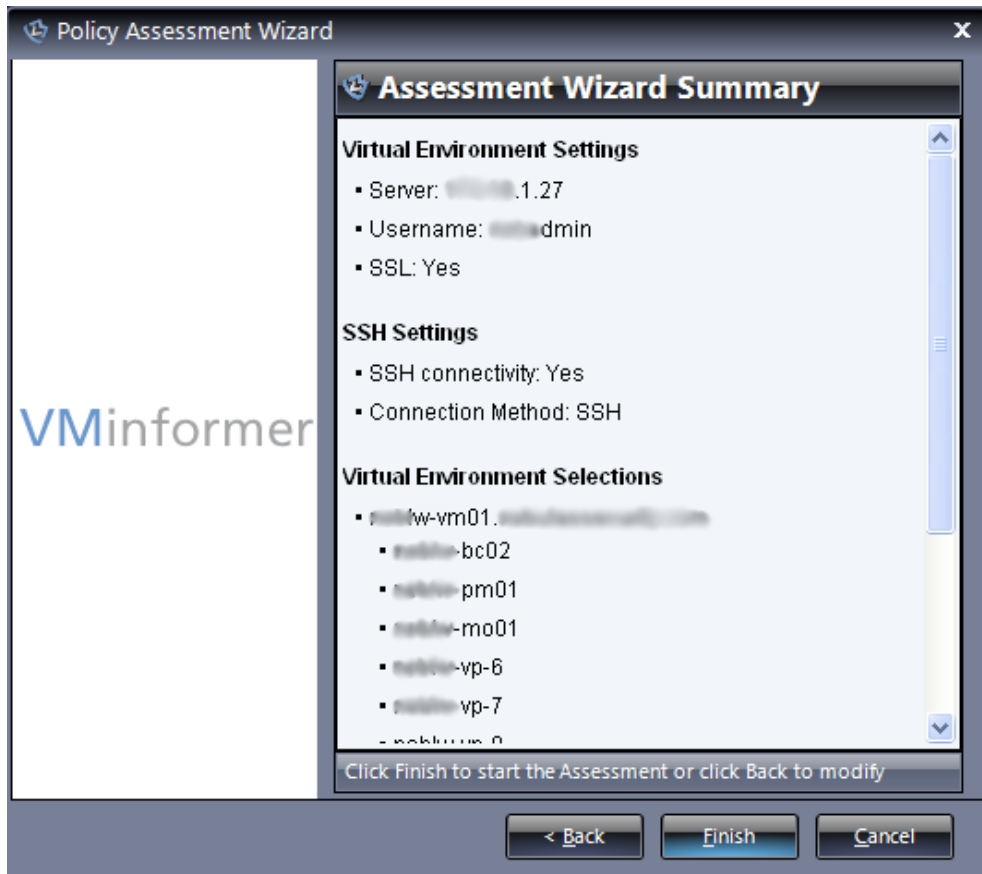
## Step 5



The next screen is the “Policy Template” screen the default policy “Recommended Policy” is automatically selected.

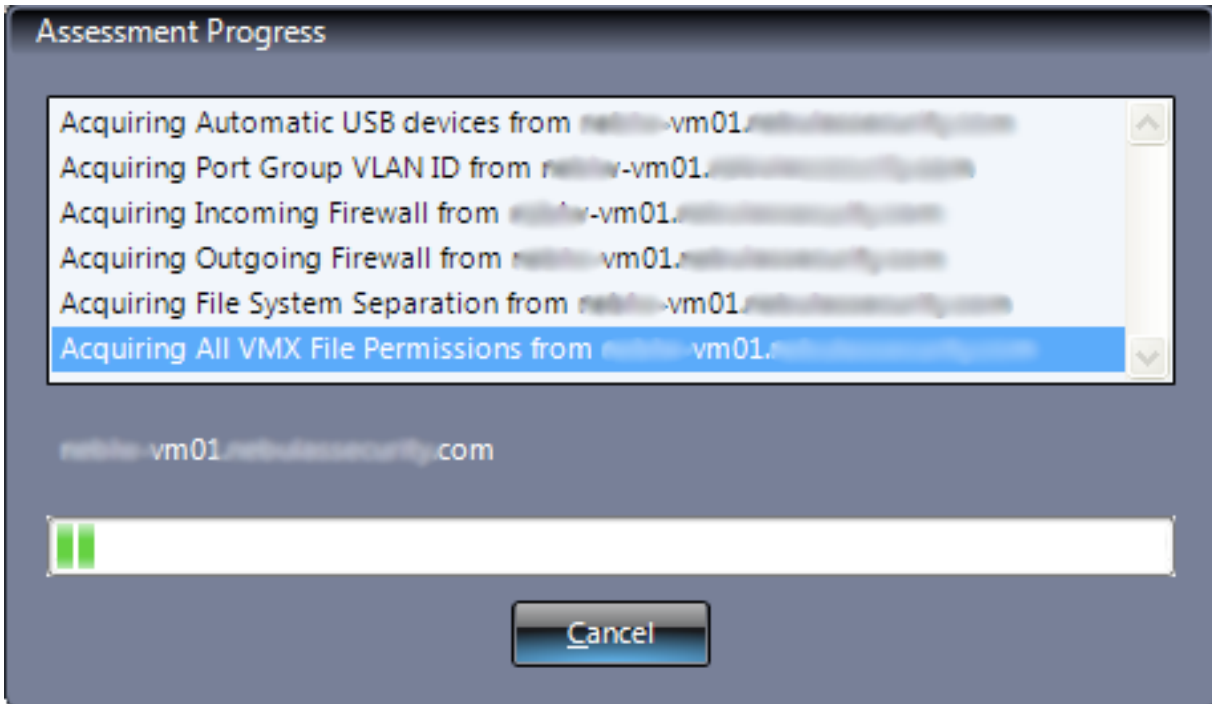
Click Next.

## Step 6



The next screen gives you a summary of your selections. If you are happy to proceed click the finish button.

## Step 7



Once the wizard completes you will be presented with the main dashboard showing all of the objects retrieved and the results. The next screen shot shows an example of how this should look.



## Dashboard - showing results

