QUICK SETUP GUIDE

Connecting Azure to Archera

Step-by-step instructions for partner teams and customer admins

Before you begin

- ✓ **Global Administrator** access in Microsoft Entra ID (usually the cloud or IT lead)
- ✓ Your **naming conventions and preferred region** for resource groups and storage accounts, if you have them
- ✓ **Owner or Contributor** access on the Azure subscription where Archera will create a storage account
- ✓ The **Azure portal and Archera** open in the same browser

1 Accept your invite and log in

- Once your Archera account is created, you'll get a **"Welcome to Archera"** email. Click **Accept Invite**.
- Log in with a username and password, or with single sign-on (Google or Microsoft).

> On an enterprise Microsoft tenant? If Microsoft login doesn't work, use a username and password for now. Entra ID SSO can be set up later. Each user needs their own email address to get an invite.

2 Start the Azure connection

- On the Archera home screen, click **Connect Cloud** and select **Azure**.

3 Enable access management in Azure

- In the Azure portal, go to **Microsoft Entra ID › Properties**.
- Set **Access management for Azure resources** to **Yes**, then click **Save**.

> This only confirms that your admin account can grant access at the subscription level. It does not grant Archera any permissions.

4 Enter your Tenant ID and Subscription ID

- Back in Archera, check the confirmation box.
- **Tenant ID:** on the Entra ID Properties or Overview page.
- **Subscription ID:** search **Subscriptions** in Azure and copy the ID of the one you're Owner or Contributor on. Archera deploys its storage account here.

5 Review resource settings (optional)

- Archera deploys to **East US** by default. To change it, click **Configure resource creation parameters**.
- Set the region, resource group, storage account, blob container and role name. Keep the storage account in the same region as the rest of the deployment.

> Why a storage account? Azure delivers cost and usage data as a FOCUS cost export, and Archera reads it from there.

6 Authorize Archera

- Click **Continue**, then **Authorize Archera**.
- Review the Microsoft consent screen and click **Accept**.
- Return to Archera, click **Check Status**, then **Continue**.

7 Choose your installation method

- **Buy through a CSP?** Choose **Subscription**.
- **Buy directly from Microsoft?** Choose **Billing Account**, then select the billing account and scope that cover the spend you want analyzed. Some may be old or disabled, so pick the active one.

> Not sure which applies? Check with your billing team or Microsoft partner.

8 Verify the connection

- Click **Verify**. Archera sets up the cost export and confirms everything is connected.
- This usually takes **2 to 5 minutes**, so don't worry if it runs for a bit.

What happens next

Initial results are typically ready in **24 to 48 hours**, once Azure delivers the first cost export. Then you can review savings recommendations, compare Archera options with Microsoft's native options side by side, and ask questions about your data with the **Archera AI** button in the bottom right corner.