



BEA AquaLogic™ Enterprise Repository (Evaluation Version)

Registrar Guide

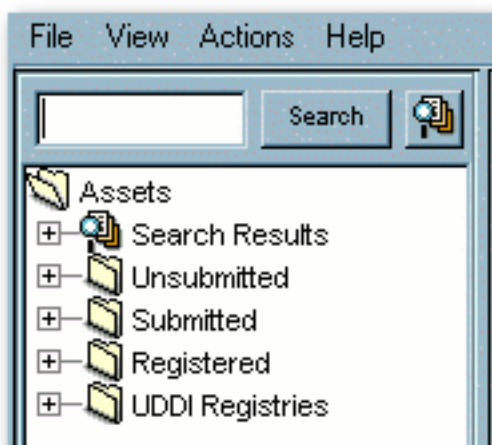
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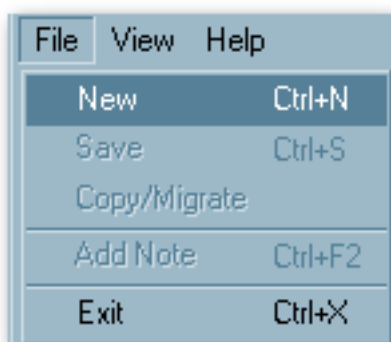
Advanced Asset Submission

This procedure is performed in the **Asset Editor**. (Access to the **Asset Editor** is determined by the role to which the user is assigned.)

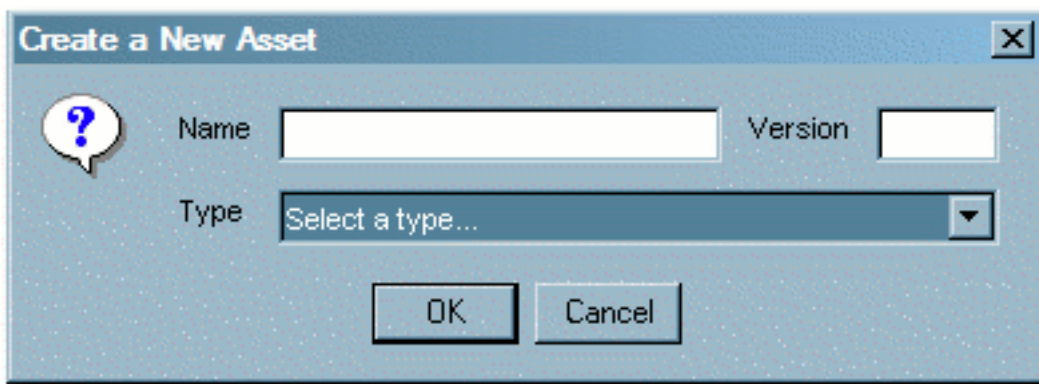
1. Open the **File** menu in the **Asset Editor**.



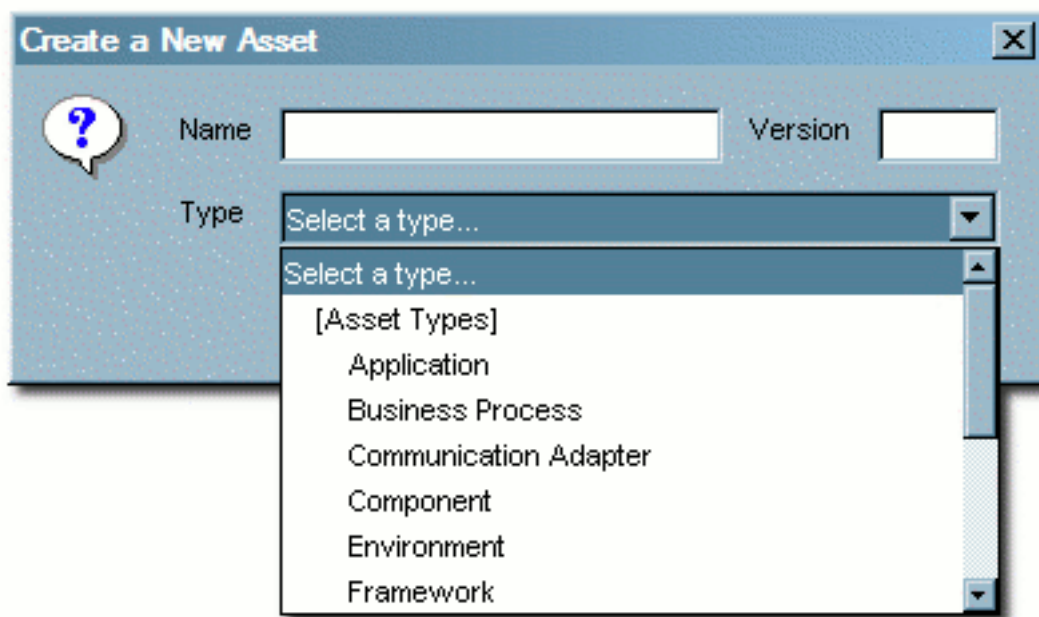
2. Select **New**



The **Create a New Asset** pop-up opens.

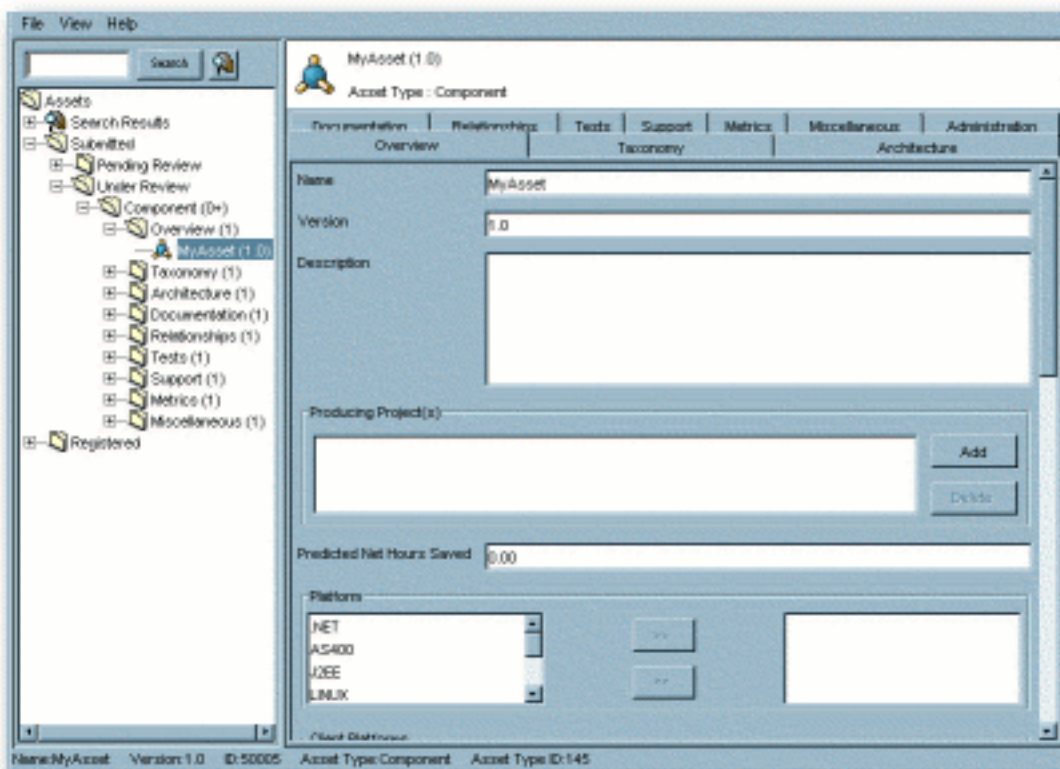


3. Enter the appropriate information in the **Name** and **Version** text boxes.
4. Select the appropriate **Type** template from the drop-down.

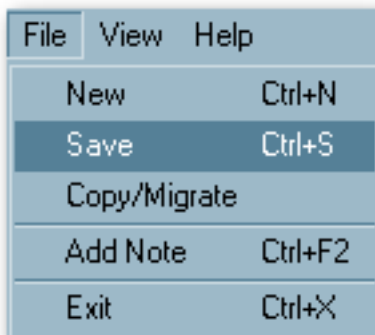


5. Click **OK**.

The new asset appears in the **Asset Editor**.



6. Click **Save** in the **File** menu in the **Asset Editor**.



The asset is submitted for review and registration.



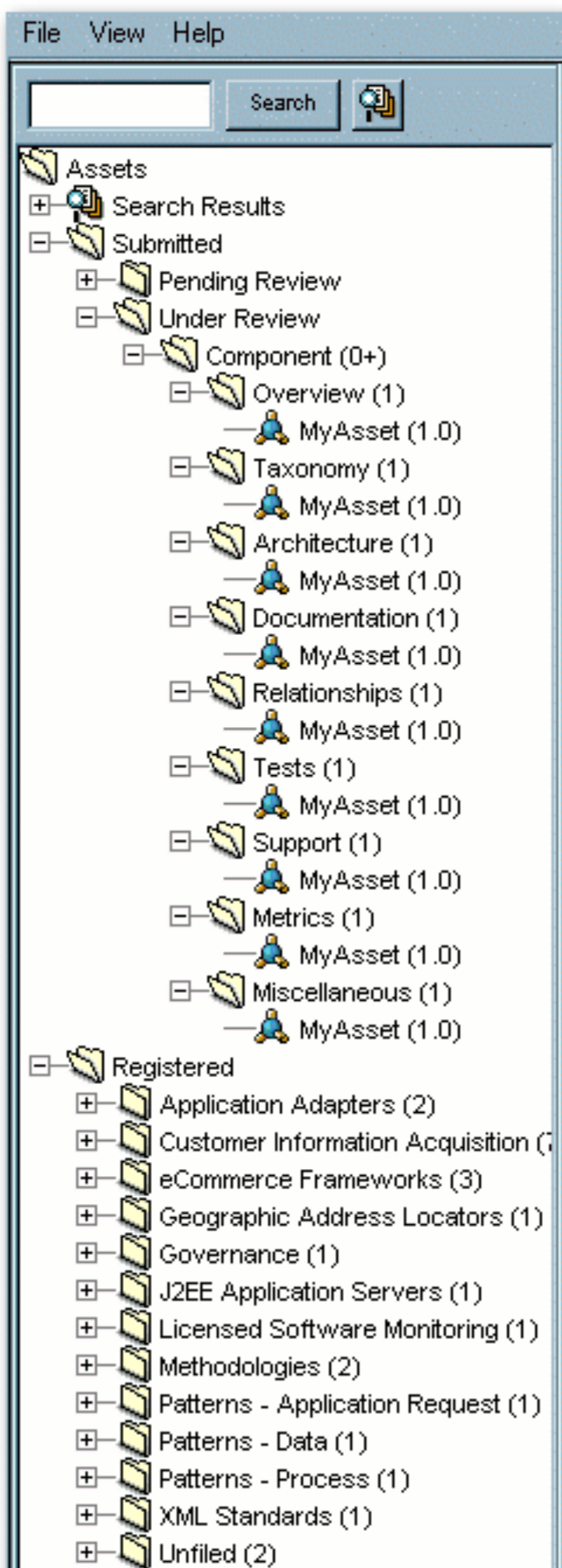
The Registration Process

Assets determined to be appropriate for reuse are submitted to the repository. Submitted assets are reviewed by the registrar, who determines which assets will proceed through the registration process.

Assets accepted by the registrar enter the registration work queues. The submitter can track the asset's progress toward registration using the **My Submissions** folder on the **My Stuff** page. Submitters are notified about rejected assets and the reason for rejection (for instance, a duplicate asset).

Understanding the Registration Process

Assets moving through the registration process are organized and managed via several folders, as displayed in the file tree in the **Asset Editor**.



An asset begins the registration process in the **Pending Review** folder, under the **Submitted** folder. Once accepted or rejected by the registrar, the asset moves to the **Under Review** folder, under **Submitted**.

Pending registrar review and approval of the data on the tabs in the **Asset Editor**, the asset moves from **Under Review** to the **Registered** folder. Users can track the progress of assets by using the **Search** function, which accesses **Submitted**, **Unsubmitted**, and **Registered** assets, or by using **My Stuff**.

The registration process includes the following actions:

- **Submission**

- An asset is submitted by a user and appears in the **Pending Review** folder under **Submitted**. An automatic email message alerts the registrar that a new asset has entered the submission queue.

- **Review**

- The registrar examines the asset and its associated information and makes a decision to enter it into the work queues or to reject it.

- **Rejection**

- If the asset is rejected, the registrar enters a reason for the rejection.
- When an asset is rejected from the submission folder, it is removed from the **Asset Editor** and marked as rejected in the submitter's **My Submissions** folder in **My Stuff**.

- **Acceptance**

- Assets accepted for registration move to the **Under Review** folder, and the registrar or advanced submitter begins the registration process. The required information is gathered and entered on the appropriate tabs in the **Asset Editor**. The registrar examines each tab and monitors the workflow. When information for a specific stage of the workflow is acceptable, the registrar approves the data on the appropriate tab. There is no prescribed order in the approval process; the registrar can approve any stage in any order. The registrar also has the option to edit any of the information for any stage of the process.

- **Approval**

- The registrar grants final approval on the **Administration** tab, based on organizational standards regarding the information supplied on each of the various tabs. The specific configuration of Asset Editor tabs for any asset is determined by the Type template to which the asset is assigned on submission. Each tab provides various elements for metadata that is used to describe the asset and facilitate its use.

Accepting a Submission

This procedure is performed in the **Asset Editor**. (Requires appropriate permission.)

1. Open the **Submitted** folder.
2. Open **Pending Review**.
3. Select the asset to be registered.

The screenshot displays the Asset Editor application window. On the left, a tree view shows the 'Submitted' folder expanded, with 'Pending Review' selected. Under 'Pending Review', the 'New Asset (1.0)' asset is highlighted. The right pane shows the asset details for 'New Asset (1.0)'. The details include: Name (New Asset), Version (1.0), Type (Component), Description (An example asset), Submitted By (/rhubart, Bob), Submitted Date (24 Feb 2006 03:24:20 PM), Comments (empty), Location (http://meta.fishline.com/pubshare/C2CSept04.www), and Producing Projects (empty). At the bottom, there are buttons for 'Accept', 'Accept and Assign', and 'Reject'. The status bar at the very bottom shows: Name: New Asset, Version: 1.0, ID: 50000, Asset Type: Component, Asset Type ID: 145.

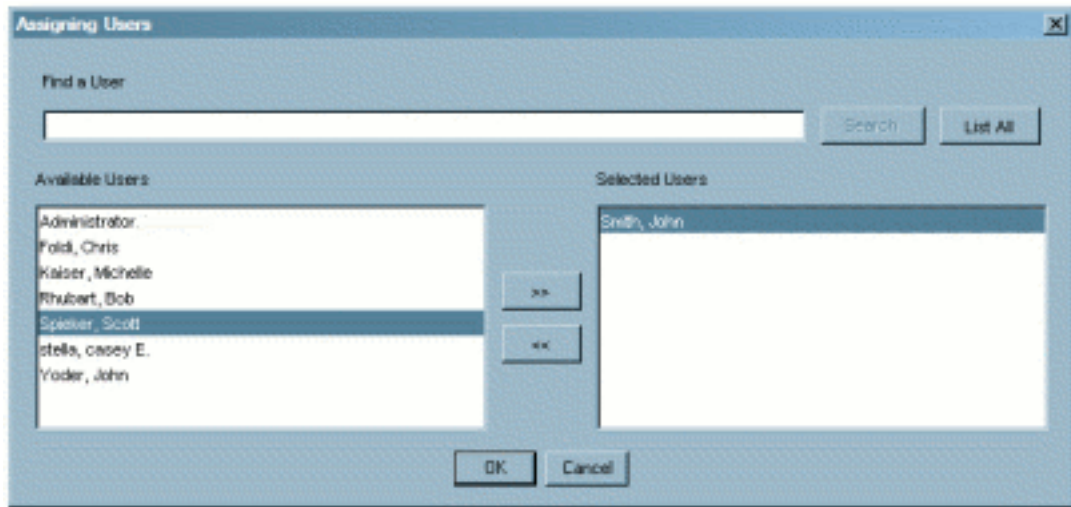
4. Options:

- Click **Accept**.

The asset moves to the **Under Review** folder in the tree, and also appears in each of the workflow folders under the asset. The workflow folders correspond to tabs in the **Asset Editor**.

- Click **Accept and Assign**

The **Assigning Users** popup opens.



1. Use the << and >> buttons to move items between the **Available Users** and **Selected Users** columns.
2. Click **OK**

The asset moves to the **Under Review** folder in the tree and is assigned to the selected user/users, who will provide the information required for each of the tabs in the **Asset Editor**. The assignees also may receive a notification e-mail that lets them know they are assigned to this asset.

Registering an Asset

Overview Tab

1. Click the **Overview** tab.

The screenshot shows the 'Asset Editor' form with the following fields and controls:

- Relationships Overview** | **Tests** | **Support** | **Metrics** | **Miscellaneous** | **Administration**
- Taxonomy** | **Architecture** | **Documentation**
- Name:** New Asset
- Version:** 1.0
- Description:** An example asset.
- Producing Project(s):** A list box with an **Add** button and a **Delete** button.
- Predicted Net Hours Saved:** 0.00
- Platform:** A list box containing .NET, AS400, J2EE, and LINUX, with **>>** and **<<** buttons.
- Client Platforms:** A list box containing IE, with a **>>** button.

2. Enter the appropriate information in each of the fields.
3. Click **Approve**.

The screenshot shows the 'Overview' tab of the Asset Editor form with the following fields and controls:

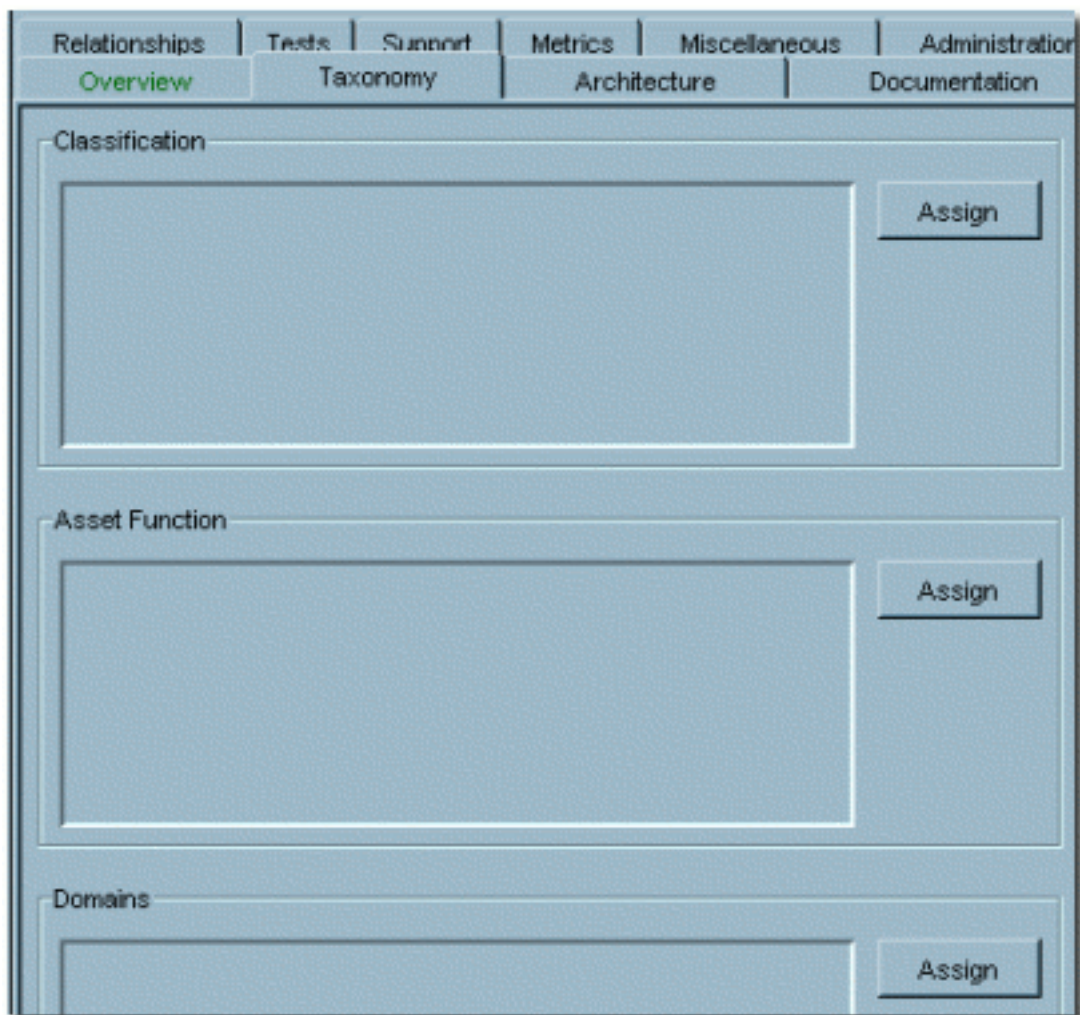
- Overview**
- Approved By:** (text field)
- Approved Date:** (text field)
- Approve** button

The text in the **Overview** tab changes color and the **Approve** button changes to **Unapprove**.

- o **Note:** Approval buttons in the **Asset Editor** are visible only to users with the appropriate permissions.

Taxonomy Tab

1. Click the **Taxonomy** tab.

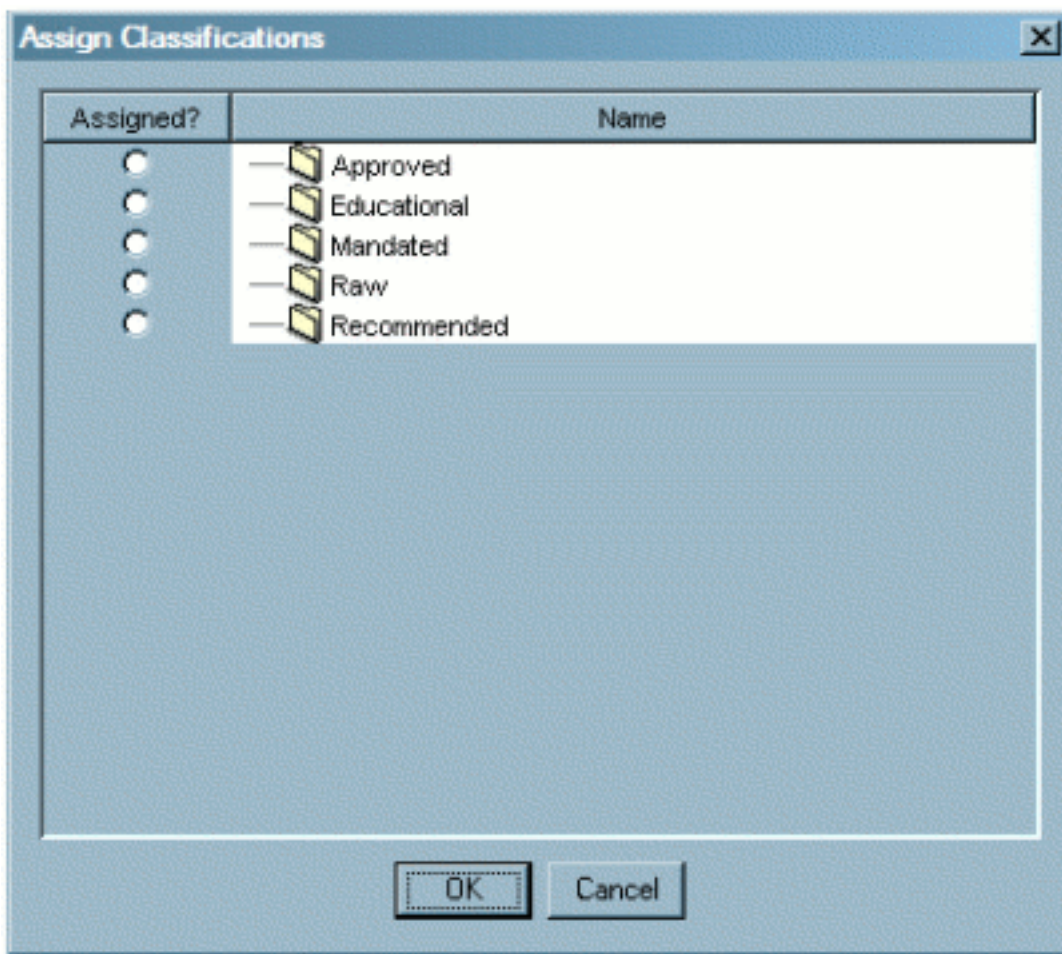


The screenshot shows a software interface with a top navigation bar containing tabs: Relationships, Tests, Summary, Metrics, Miscellaneous, and Administration. Below this is a secondary bar with tabs: Overview (highlighted in green), Taxonomy, Architecture, and Documentation. The main content area is divided into three sections: Classification, Asset Function, and Domains. Each section contains a large empty rectangular box and an 'Assign' button to its right.

Several **Categorizations** are displayed.

2. Click the **Assign** button in the **Classification** section.

The **Assign Classifications** pop-up opens.



3. Use the radio buttons to select the appropriate classification.

- **Raw**
 - No assurance of quality or completeness.
- **Educational**
 - For educational/informational purposes only. Not approved for use in projects.
- **Approved**
 - Approved by the Registrar for use in projects.
- **Recommended**
 - Approved and successfully deployed in at least one project.
- **Mandated**
 - Must be used whenever a project requires the functionality the asset provides. (This is especially relevant for Web services that access customer data, process payments, etc.).

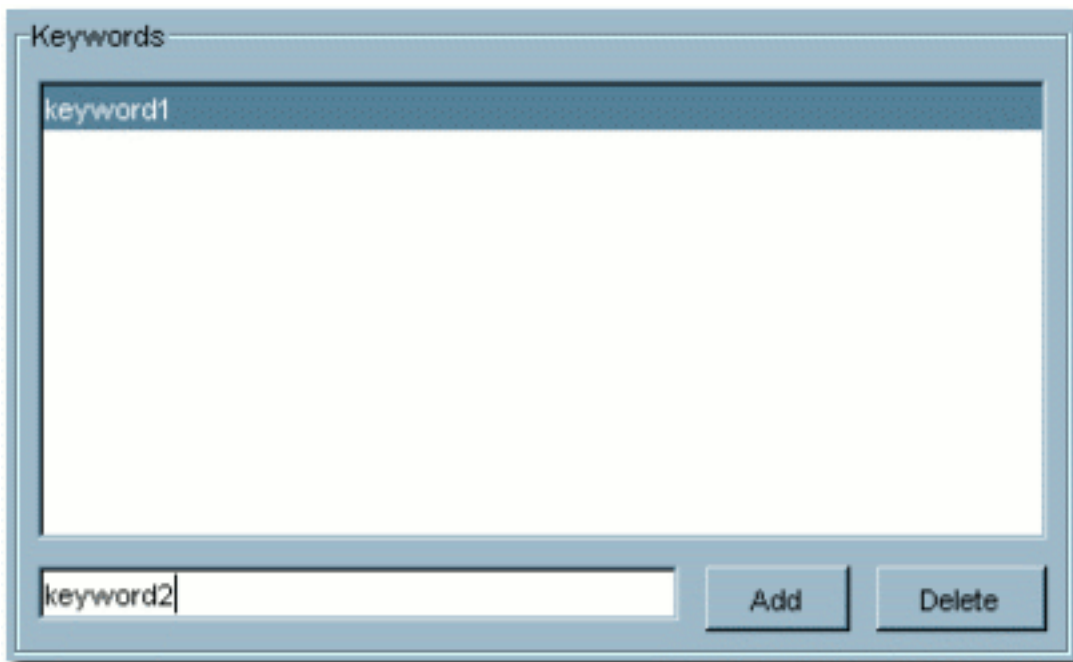
4. Click **OK**.

The selections are listed in the **Classifications** section.

Note: Default **Categories** may be customized to reflect your environment.

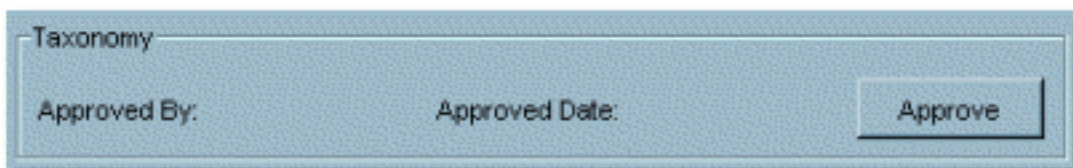
5. Repeat the process for each section in the **Taxonomy** tab.
6. Enter an appropriate keyword in the text box in the **Keywords** section.
7. Click **Add**.

The new keyword appears in the **Keywords** list.

A screenshot of a software dialog box titled "Keywords". The dialog box has a light blue border. Inside, there is a list box at the top containing the text "keyword1". Below the list box is a large white rectangular area. At the bottom of the dialog box, there is a text input field containing the text "keyword2". To the right of the input field are two buttons: "Add" and "Delete".

Add other keywords as necessary.

8. When the **Taxonomy** tab is completed, click **Approve**.

A screenshot of a software dialog box titled "Taxonomy". The dialog box has a light blue border. Inside, there are two labels: "Approved By:" and "Approved Date:". To the right of these labels is a button labeled "Approve".

The text in the **Overview** tab changes color and the **Approve** button changes to **Unapprove**.

Documentation Tab

1. Click the **Documentation** tab.

The screenshot shows a software interface with a top navigation bar containing tabs: Relationships, Tests, Support, Metrics, Miscellaneous, Administration, Overview (highlighted in green), Taxonomy, Architecture, and Documentation. The main content area is titled 'Documentation' and contains a table with the following data:

Name	URL	Appro...	Requi...
Certification Plans		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Configuration Guidelines		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Design Document		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Development Coding Guid...		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Installation Guidelines		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Localization Guidelines		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Maintenance History		<input type="checkbox"/>	<input checked="" type="checkbox"/>

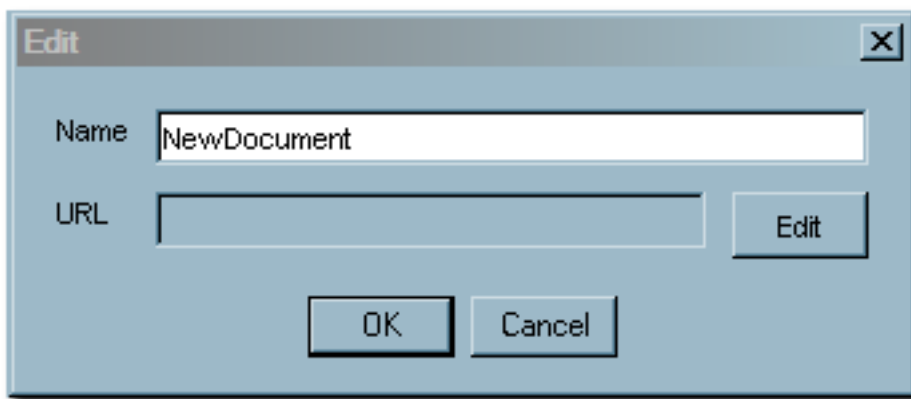
To the right of the table are four buttons: Add, Edit, Approve, and Delete. Below the table, there is a section labeled 'Documentation' with fields for 'Approved By:' and 'Approved Date:', and an 'Approve' button.

A number of suggested document titles are listed in the **Documentation** window. Appropriate documentation may be associated with each of these titles, and new documents may be added to the list.

To add a new document:

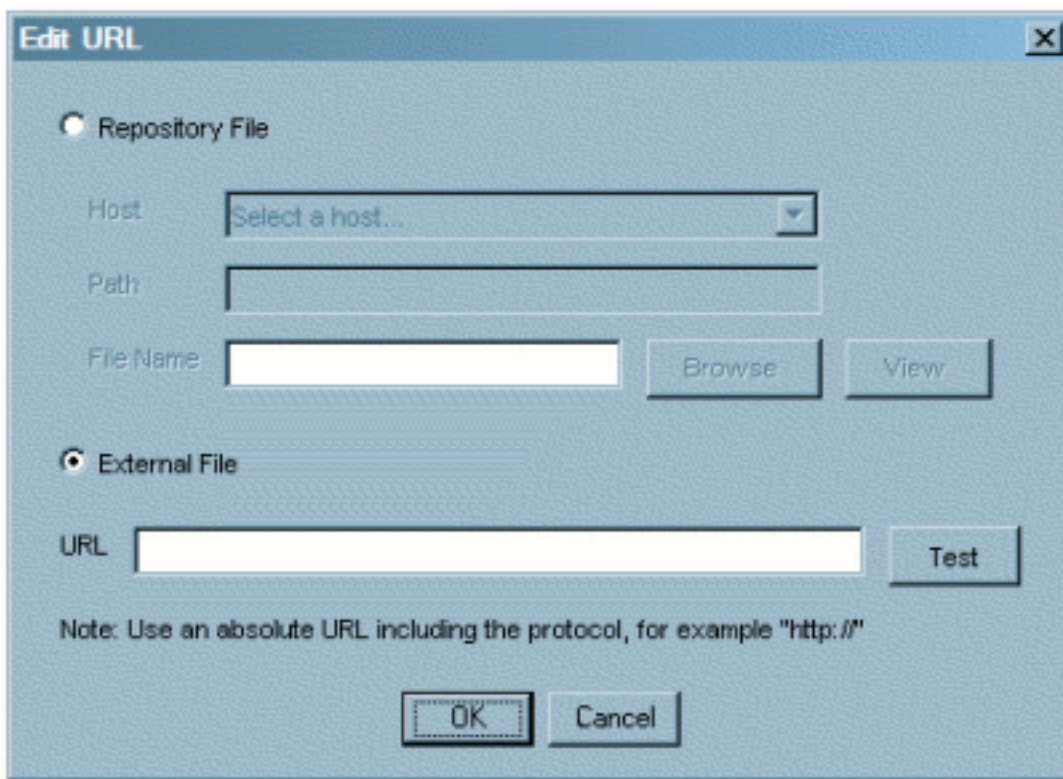
2. Click **Add**.

The **Edit** pop-up opens.

A dialog box titled "Edit" with a close button (X) in the top right corner. It contains two text input fields: "Name" with the text "NewDocument" and "URL" which is empty. To the right of the "URL" field is an "Edit" button. At the bottom of the dialog are "OK" and "Cancel" buttons.

3. Enter the appropriate information in the **Name** text box.
4. Click the **Edit** button next to the **URL** text box.

The **Edit URL** pop-up opens.

A dialog box titled "Edit URL" with a close button (X) in the top right corner. It has two radio button options: "Repository File" (unselected) and "External File" (selected). Under "Repository File", there are three text input fields: "Host" with a dropdown menu showing "Select a host...", "Path", and "File Name". To the right of the "File Name" field are "Browse" and "View" buttons. Under "External File", there is a "URL" text input field and a "Test" button to its right. At the bottom, there is a note: "Note: Use an absolute URL including the protocol, for example 'http://'", and "OK" and "Cancel" buttons.

5. Select **Repository File** or **External File**, as appropriate.
6. Enter all necessary information in the available text boxes.
7. Click **OK**.

The new document appears in the list.

Documentation

Name	URL	Appr...	Requ...
Programmer's Reference ...		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Release Notes		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sample Code		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Specifications/Guidelines ...		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Upcoming Version/Featur...		<input type="checkbox"/>	<input checked="" type="checkbox"/>
User Guide		<input type="checkbox"/>	<input checked="" type="checkbox"/>
NewDocument	http://N...	<input type="checkbox"/>	<input type="checkbox"/>

Add

Edit

Approve

Delete

- To edit file information for an existing document, select the document, click **Edit** and repeat Steps 4-7.
- When finished, click **Approve**.

Documentation

Approved By: _____ Approved Date: _____

Approve

Relationships Tab

- Click the **Relationships** tab.
- Click the **Add** button.

Add Relationship

Define Relationship

Asset (1.0)

Relationship Type: Next version is

Find Assets To Relate

Active Search List All Active

Asset
Sample Application - ACES
Sample Application - Commercial Card Authorization System
Sample Business Process - Order Verification Process (1.0)
Sample Comm Adapter - Customer Credit Information (3.0)
Sample Component - NET-Find Address Method (Beta Release)
Sample Component J2EE - Order EJB (2.0)
Sample Environment - Tomcat (4.1)
Sample Framework - Struts (3.2)
Sample Pattern - Front Controller Design (1.0)
Sample Pattern - MVC Design (2.0)
Sample Pattern - View Helper Design (1.0)
Sample Process - SCRUM (2.0)
Sample Project Profile - Purchase Request Tracking System (1.0)
Sample Service - Account Detail (dynamic) (2.0)
Sample Service - Account Detail (static) (1.0)
Sample XML Schema - MARC (1.0)
Training Asset (1.0)

Confirm Relationship

Asset (1.0)
"Next version is"
Training Asset (1.0)

Reverse Relationship

Training Asset (1.0)
"Previous version is"
Asset (1.0)

OK Cancel

The **Add Relationship** pop-up opens.

3. Use the **Search** or **List All Active** buttons to display assets in the **Asset** section of the pop-up.
4. Select an asset from the list.
5. Use the **Relationship Type** drop-down to select the appropriate relationship between the two assets.

Note: If necessary, click  to reverse the relationship.

6. Click **OK** when finished.
7. Repeat as necessary to add other asset relationships.
8. When finished, click **Approve**.

A screenshot of a dialog box titled "Relationships". It has a light blue background and a thin border. Inside, there are two labels: "Approved By:" and "Approved Date:". To the right of these labels is a button labeled "Approve".

See the BEA AquaLogic Enterprise Repository **Administration Guide** for information on configuring relationships.

Completing the Tab Approval Process

While certain tabs are common to all asset types, the specific **Asset Editor** tabs for any asset are determined by the configuration of the Type template to which the asset is assigned on submission. Similarly, the metadata elements that appear on any tab are also determined by the Type configuration. While the specific tabs and elements may vary from Type to Type, the approval process for each tab involves the entry and/or review of the information in each element.

Administration Tab

Every asset in BEA AquaLogic Enterprise Repository has an **Administration** tab. Use the **Administration** tab to:

- Track the asset Created, Submitted, Accepted workflow.
- Assign users to review and approve information on the other tabs.
- Change the asset's status:
 - Active
 - Inactive

- Retired
- Deleted
- View asset notes and reviews.
- Complete the registration process by clicking the **Register** button.

Overview

Taxonomy

Architecture

Documentation

Relationships

Tests

Support

Metrics

Miscellaneous

Administration

Created

Created By: Rhubart, Bob

Created Date: 24 Feb 2006 03:24:20 PM

Submitted

Submitted By: Rhubart, Bob

Submitted Date: 24 Feb 2006 03:24:20 PM

Accepted

Accepted By: Administrator, ALER

Accepted Date: 27 Feb 2006 01:07:42 PM

Assign Users

Assigned To	Assigned Date
Smith, John	28 Feb 2006 04:43:53 PM

Add

Delete

Email Assigned Users

Registered

Registered By:

Registered Date:

Register

Notification

Notify Subscribers

Status

Active

Type

Component

Logs

Notes

Reviews

Refresh

Submitter	Date	Type	Comments
Administrato...	28 Feb 2006	Note	This is a note

View

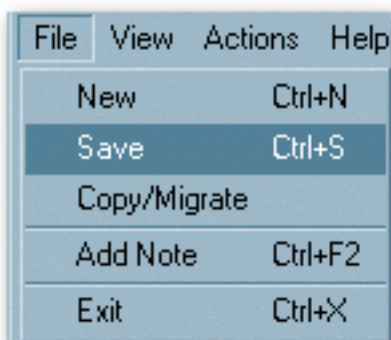


A registered asset can include unapproved tabs.

Completing the Registration Process

Saving Changes

1. Click **Save** in the **File** menu.



Audit Log, Reviews, and Notes

Audit Log Entries

When an Asset is updated, a record of the User, date and action appears in the Audit Log. Logged changes include:

1. Asset Creation
2. Asset Update

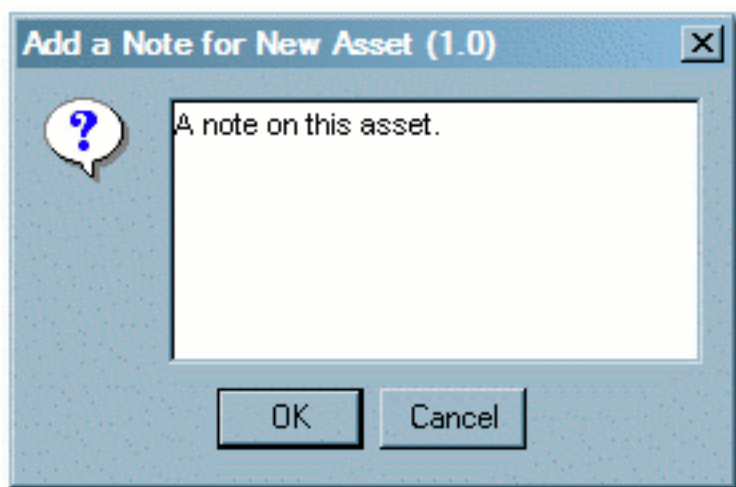
3. Changes in an Asset's **Registration Status**
4. Changes in an Asset's **Active Status**

The log entry is added to the list in the **Logs** section on the asset's **Administration** tab. (It may be necessary to click the **Refresh** button in the **Logs** section.)

Adding a Note to the Asset

1. Click **Add Note** in the **File** menu.

The **Add a Note for...** pop-up opens.



2. Enter the appropriate information in the text box.
3. Click **OK**.

The note is added to the list in the **Logs** section on the asset's **Administration** tab. (It may be necessary to click the **Refresh** button in the **Logs** section.)

See the BEA AquaLogic Enterprise Repository **Administration Guide** for more information on using the **Asset Editor**.

Using the Asset Editor

Overview

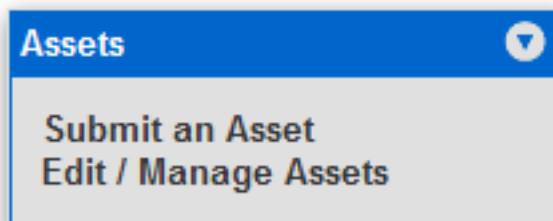
The **Asset Editor** is used to administer assets and to configure assets and types. Categories, relationships, rejection reasons, repositories, and vendors are also configured within the **Asset Editor**.

The specifics of configuration depend on your organization's guidelines, and may differ slightly from the options discussed here.

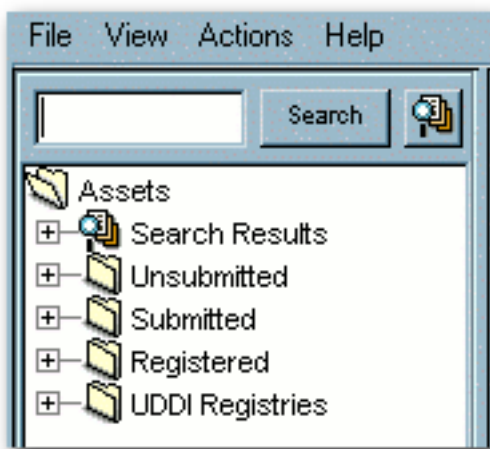
Launching the Asset Editor

This procedure is performed on the BEA AquaLogic Enterprise Repository **Assets** screen.

1. Click **Edit/Manage Assets**.

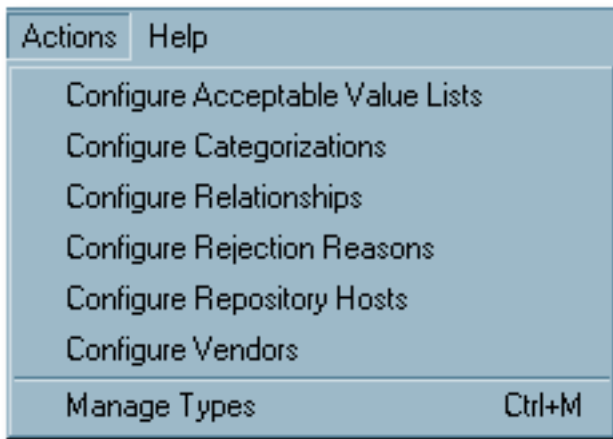


The **Asset Editor** opens.



Configuring System Options

Six system options can be configured from the **Actions** menu in the **Asset Editor**.



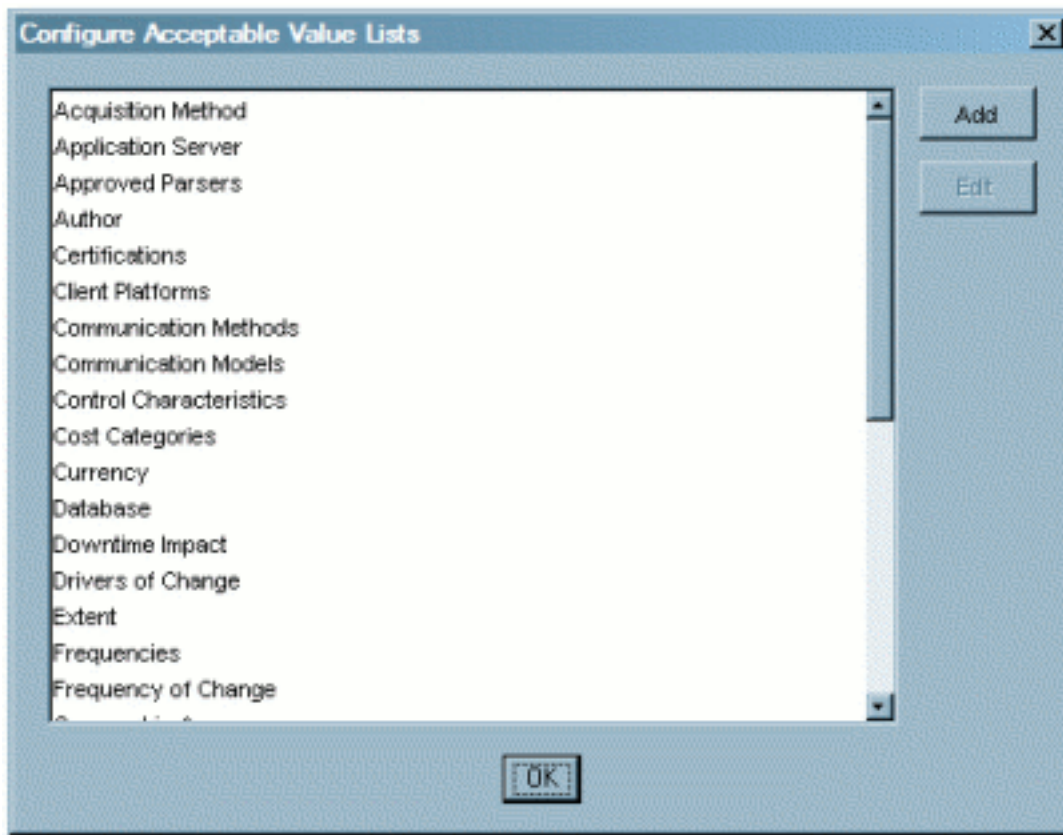
Configure Acceptable Value Lists

Defines/identifies the single- and multiple-selection lists used as metadata elements in asset displays.

This procedure is performed in the **Asset Editor**.

1. Select **Configure Acceptable Value Lists** from the **Actions** menu.

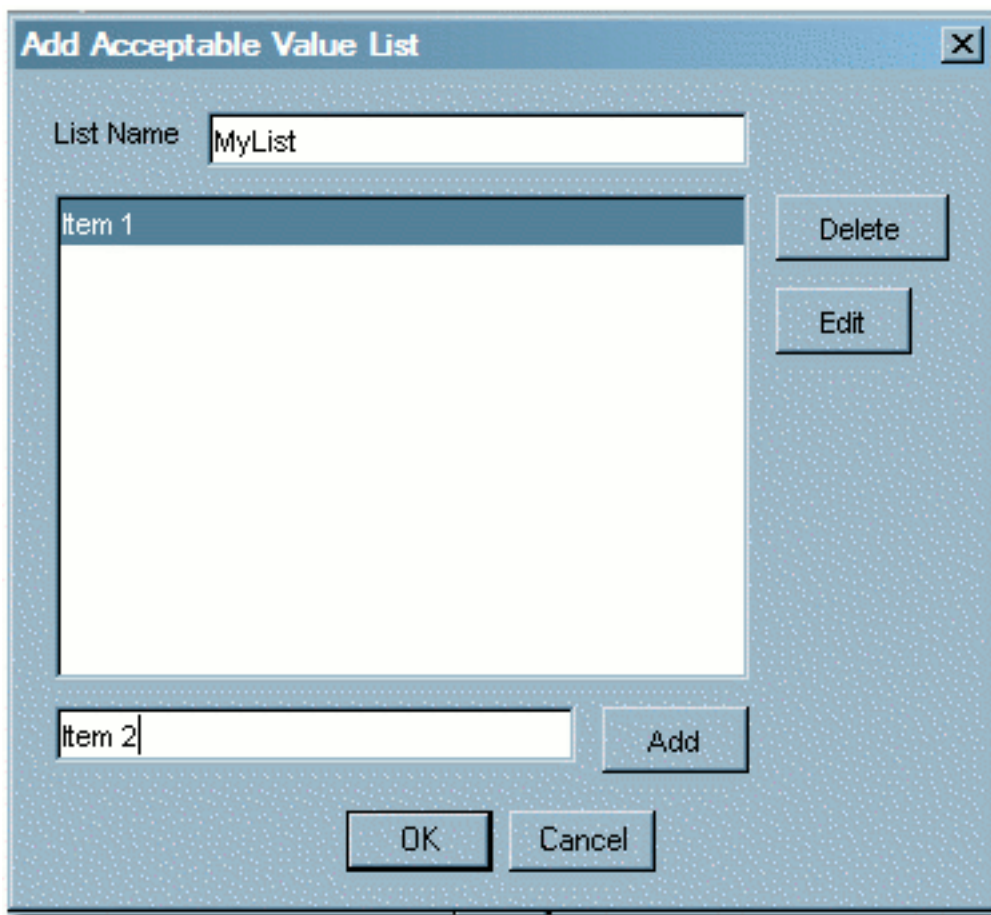
The **Configure Acceptable Value Lists** pop-up opens.



2. Click **Add**

The **Add Acceptable Value List** pop-up opens.

3. Enter an appropriate name in the **List Name** text box.



4. Enter an appropriate list item name in the text box next to the **Add** button.
5. Click **Add**.
6. Repeat Steps 4 & 5 as necessary to add additional list items.
7. When finished, click **OK**.

The new list appears in the **Configure Acceptable Value Lists** pop-up.

8. To edit any **Acceptable Value List**, select the list from the **Configure Acceptable Value Lists** pop-up.
9. Click **Edit**.

The **Edit Acceptable Value List** pop-up opens. (Same form as the **Add Acceptable Value List** pop-up.)

10. Make changes as necessary.
11. Click **OK**.

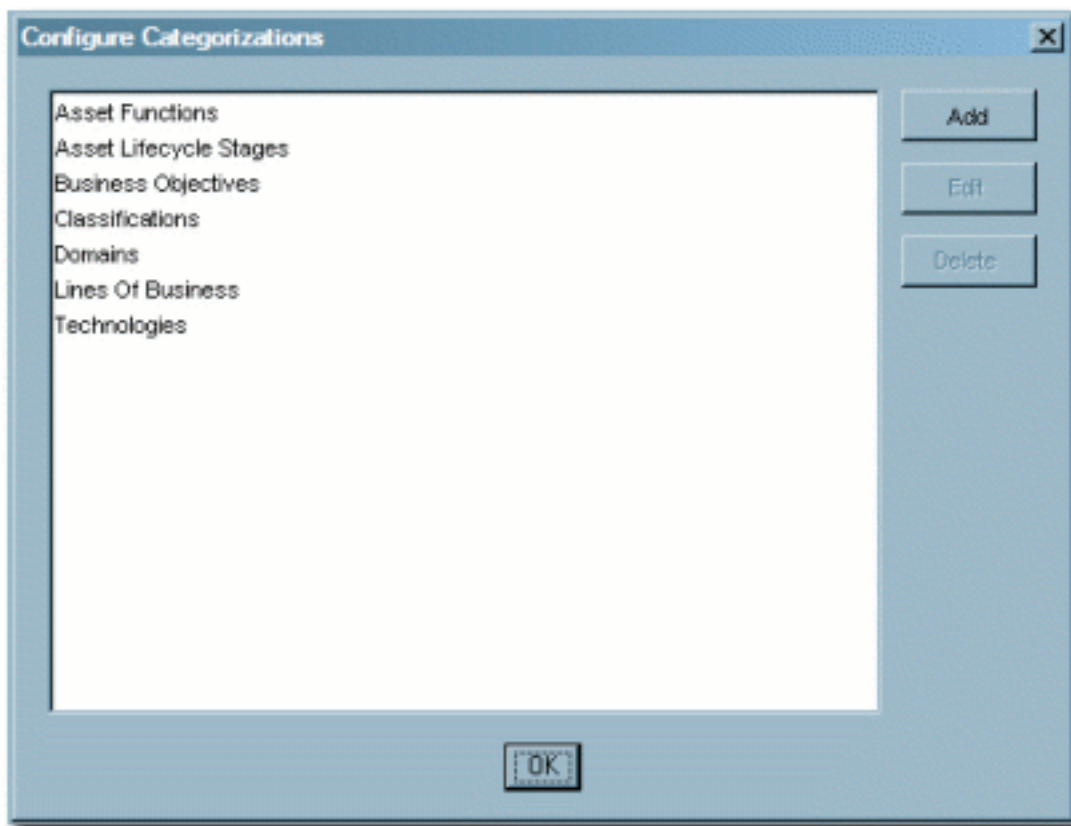
Configure Categorizations

Categorizations determine how assets are organized and viewed. They can also be applied in a similar fashion to projects.

This procedure is performed in the **Asset Editor**.

1. Select **Configure Categorizations** from the **Actions** menu.

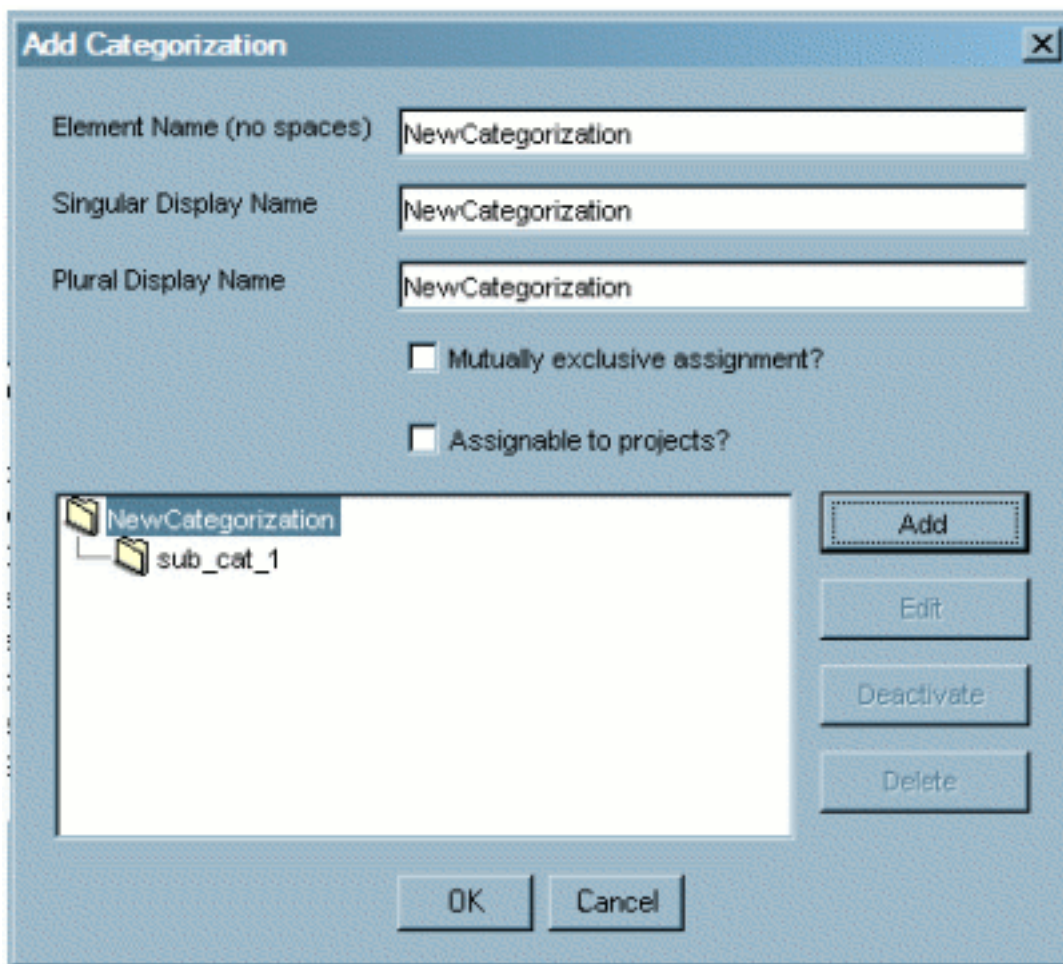
The **Configure Categorizations** pop-up opens.



2. Click **Add**.

The **Add Categorizations** pop-up opens.

3. Enter the appropriate information in each of the text boxes.



Add Categorization

Element Name (no spaces)

Singular Display Name

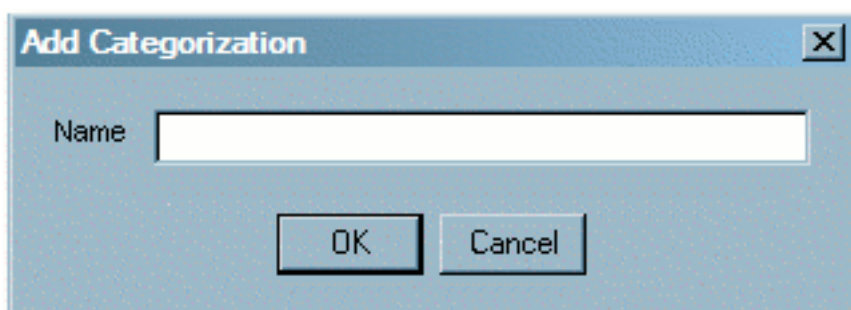
Plural Display Name

☐ Mutually exclusive assignment?

☐ Assignable to projects?

☐ NewCategorization
 ☐ sub_cat_1

4. Make the appropriate selection in the **Mutually exclusive assignment?** checkbox.
5. Make the appropriate selection in the **Assignable to projects?** checkbox.
6. Click **Add** to add sub-categorizations.



Add Categorization

Name

7. When finished, click **OK**.

The new categorization appears in the **Configure Categorizations** pop-up.

8. To edit any **Categorization**, locate it in the list in the **Configure Categorizations** pop-

up.

9. Click **Edit**.

The **Edit Categorization** pop-up opens. (Same form as the **Add Categorizations** pop-up.)

10. Make changes as necessary.

11. Click **OK**.

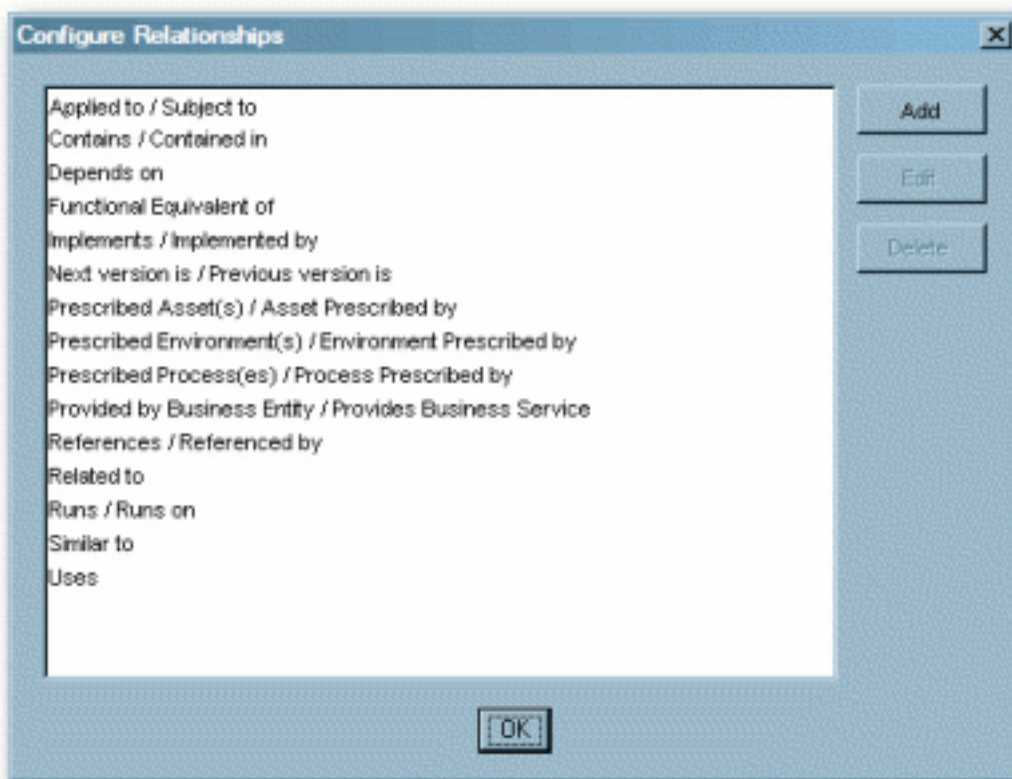
Configure Relationships

Relationships define the connection, interaction, or interdependence between assets. If so configured, assets subject to a specific relationship to an asset that has been selected for use (that is, the **Use - Download** button has been clicked) may also be downloaded.

This procedure is performed in the **Asset Editor**.

1. Select **Configure Relationships** from the **Actions** menu.

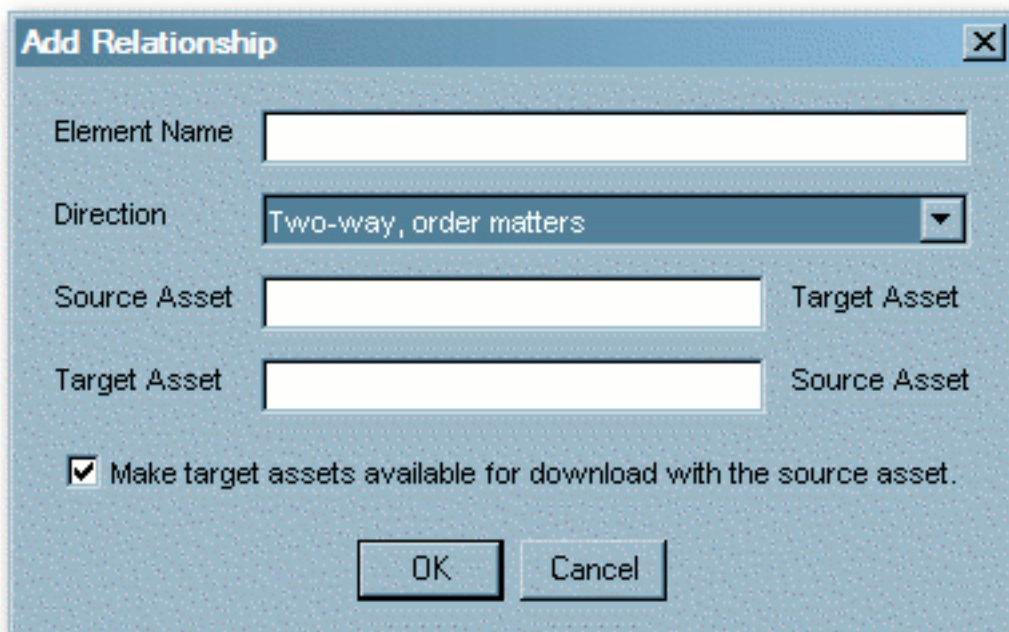
The **Configure Relationships** pop-up opens.



2. Click **Add**.

The **Add Relationships** pop-up opens.

3. Enter the appropriate information in each of the text boxes.



4. Make the appropriate selection in the **Direction** drop-down.

The selected direction affects the information displayed in the **Source Asset** and **Target Asset** text boxes. For example, in a two-way relationship, the target and source are interdependent, whereas **Two-way -- order matters** can be used to describe the relationship between sequential versions of an asset, i.e., the relationship between Asset v0.90 and Asset v1.0.

5. Make the appropriate selection in the **Make target assets available for download with the source asset** checkbox.
6. When finished, click **OK**.
7. To edit any **Relationship**, locate it in the list in the **Configure Relationships** pop-up.
8. Click **Edit**.

The **Edit Relationships** pop-up opens. (Same form as the **Add Relationship** pop-up.)

9. Make changes as necessary.
10. Click **OK**.

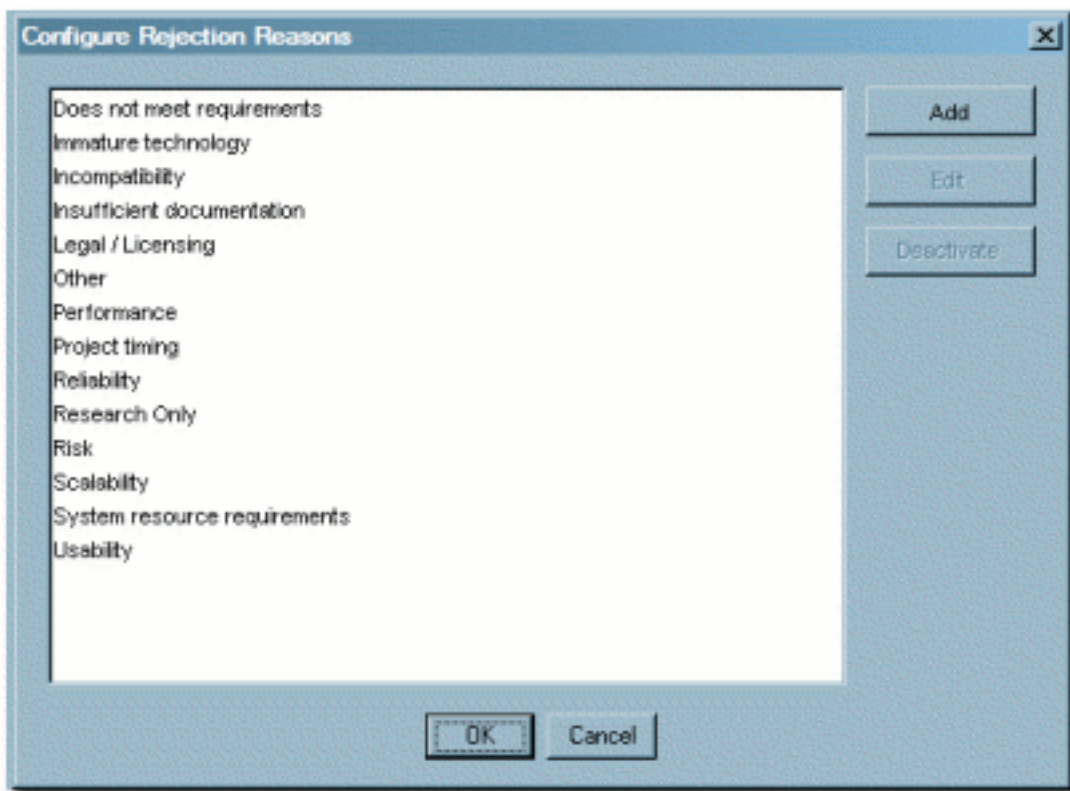
Configure Rejection Reasons

Determines the selection of **Rejection Reasons** available to users who reject previously used/downloaded assets. **Rejection Reasons** provide valuable local community feedback on assets.

This procedure is performed in the **Asset Editor**.

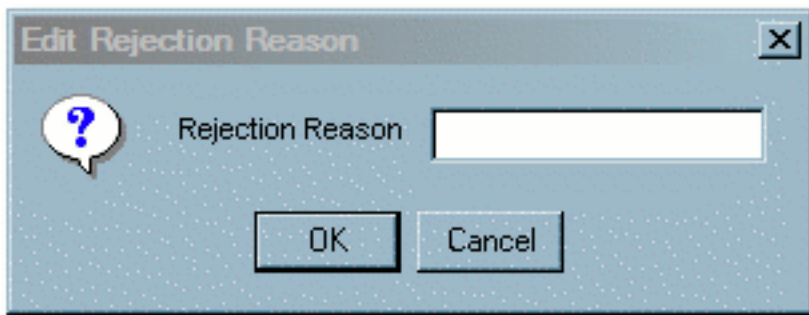
1. Select **Configure Rejection Reasons** from the **Actions** menu.

The **Configure Rejection Reasons** pop-up opens.



2. Click **Add**.

The **Edit Reject Reasons** pop-up opens.



3. Enter the appropriate text in the **Rejection Reason** text box.

4. When finished, click **OK**.

5. To edit any **Reject Reason**, locate it in the list in the **Configure Rejection Reasons** pop-up.

6. Click **Edit**.

The **Edit Reject Reasons** pop-up opens.

7. Make changes as necessary.

8. Click **OK**.

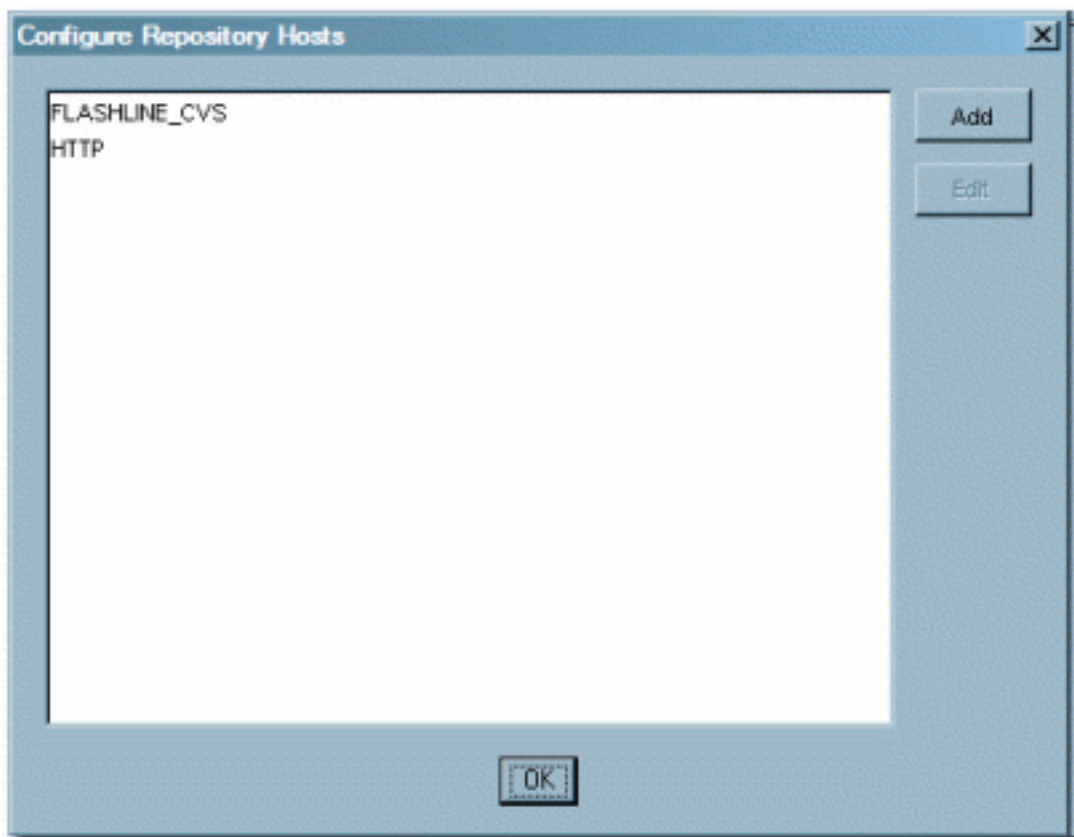
Configure Repository Hosts

Determines where the files relevant to assets in the Repository are stored.

This procedure is performed in the **Asset Editor**.

1. Select **Configure Repository Hosts** from the **Actions** menu.

The **Configure Repository Hosts** pop-up opens.



2. Click **Add**.

The **Create a new Repository Host** pop-up opens.

Create a new Repository Host

Name: UNC

Type: UNC

Hostname: flashline

Path: upload/

Username: MyName

Password: *****

URL: file:///flashline/upload/

☐ Proxy Download Requests

OK Cancel

3. Enter a name for the repository.

4. In the **Type** list, select a type for the repository.

- Default Types:
 - **FTP**
 - Accesses files on an FTP server
 - **HTTP**
 - Accesses files on a Web server
 - **HTTPS**
 - Accesses files on a secure Web server
 - **UNC**
 - Accesses files using a Windows or Samba share
 - **Raw URI**
 - Access files via a raw URI.
- Depending on the integration options included in your installation of BEA AquaLogic Enterprise Repository, one or more of the following types may be available:

- **PVCS**
 - Accesses the PVCS source control management system
- **ChangeMan DS**
 - Accesses the ChangeMan DS source control management system
- **ClearCase**
 - Accesses the ClearCase source control management system
- **CVS**
 - Accesses the CVS source control management system (requires ViewCVS or similar product)
- **FileStores**
 - Accesses the ClearCase or other SCM control management system
- **ClearQuest**
 - Accesses the ClearQuest defect tracking system

5. Enter a hostname and path for the server.

6. Optional: Enter a username and password.

Exercising this option enables automatic login.

7. When finished, click **OK**.

8. To edit any **Repository Host**, locate it in the list in the **Configure Repository Hosts** pop-up.

9. Click **Edit**.

The **Edit Repository Host** pop-up opens. (Same form as the **Create a new Repository Host** pop-up.)

10. Make changes as necessary.

11. Click **OK**.

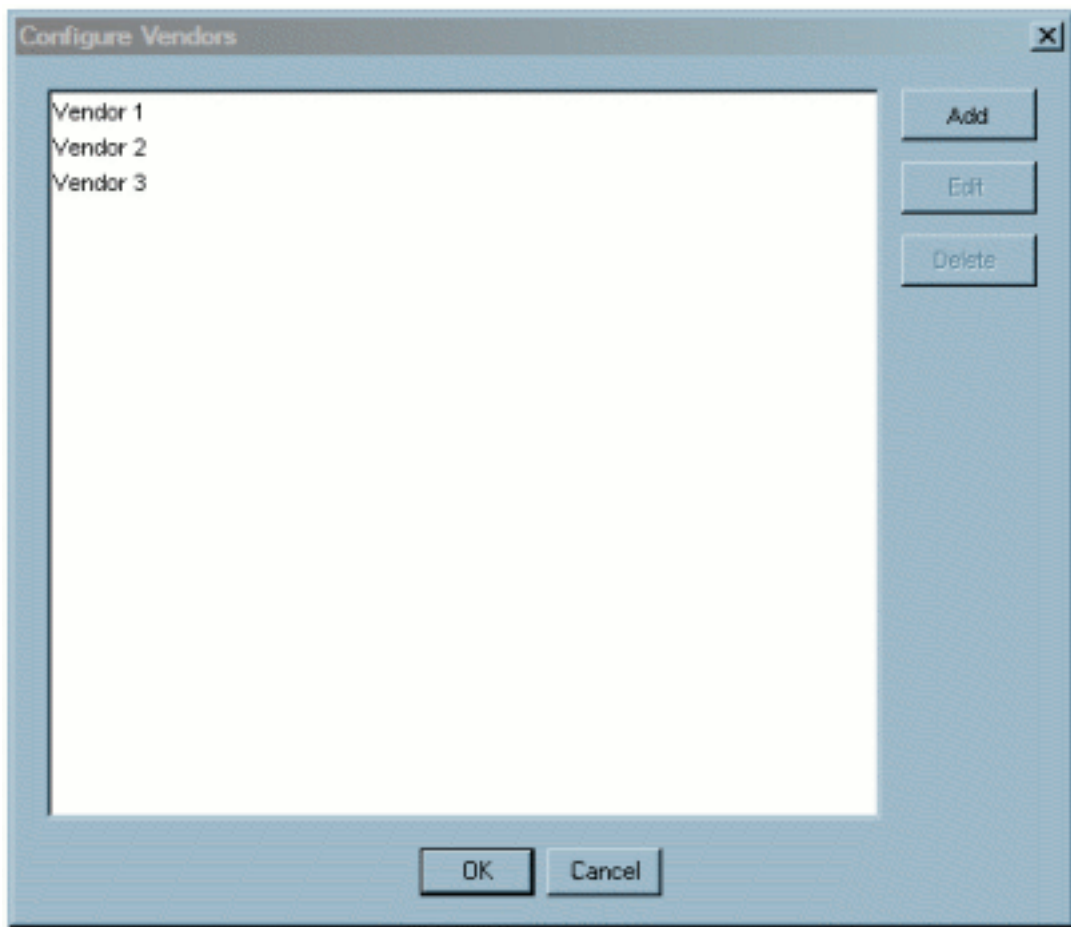
Configure Vendors

Defines/identifies vendors providing assets to the repository.

This procedure is performed in the **Asset Editor**.

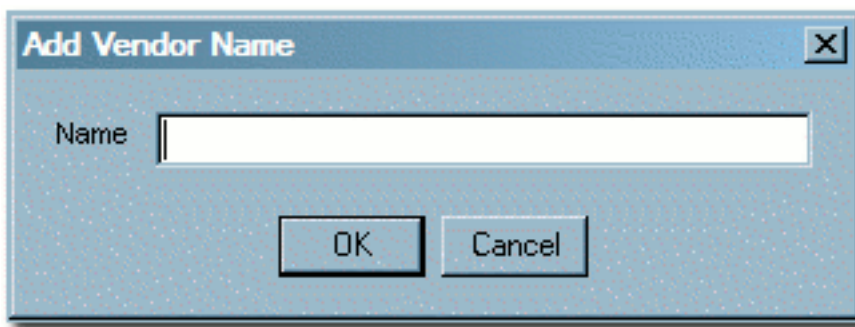
1. Select **Configure Vendors** from the **Actions** menu.

The **Configure Vendors** pop-up opens.



2. Click **Add**.

The **Add Vendor Name** pop-up opens.



3. Enter the appropriate information in the **Name** text box.
4. When finished, click **OK**.
5. To edit any **Vendor**, locate it in the list in the **Configure Vendors** pop-up.
6. Click **Edit**.

The **Edit Vendor Name** pop-up opens. (Same form as the **Add Vendor Name** pop-up.)

7. Make changes as necessary.
8. Click **OK**.

Asset/Compliance Template Migration

Overview

Migration refers to the transfer of metadata and files from one asset or compliance template to another, usually of the same type. Since it is easier to edit metadata than to recreate it, this function allows users to quickly create different versions of assets or compliance templates. For example, in order to create JavaComponent v1.0, one would migrate the metadata and files from JavaComponent v0.90, then make the necessary changes in the metadata for the v1.0 asset. When migrating an asset the new asset must have a different name, version number, or both. Migration does NOT remove the original asset from the BEA AquaLogic Enterprise Repository.

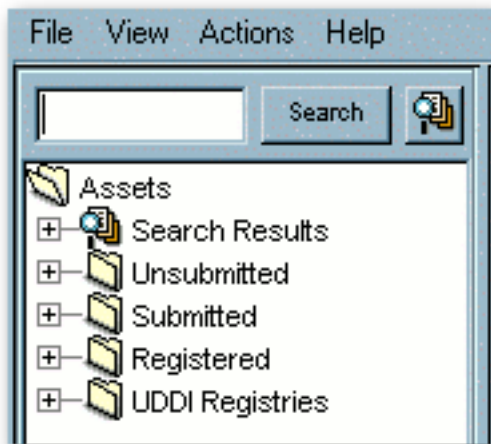
It is also possible to migrate an asset or compliance template to a different type. However differing metadata elements will not transfer. For example, if the originating asset type uses

a table on one of its tabs and is migrated to an asset type that does not have the same table element, the table and its metadata will not migrate. The table metadata element would have to be created in the new asset type.

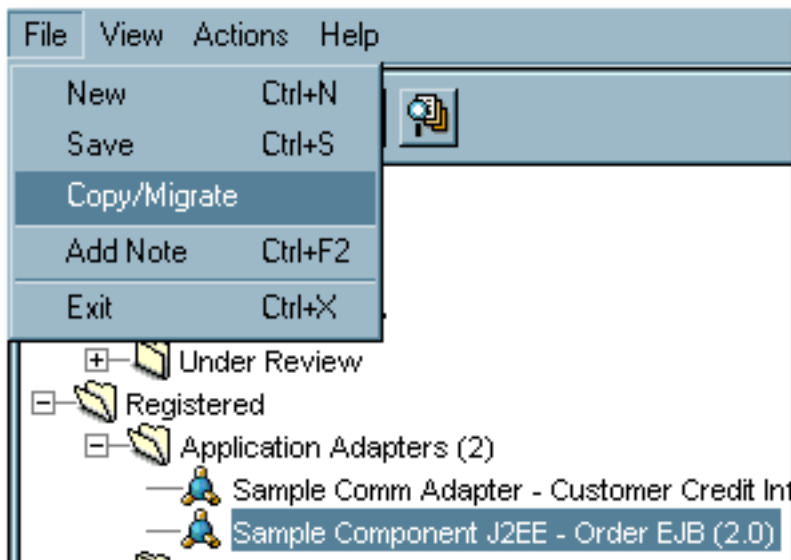
Migrating an Asset/Compliance Template/Policy

This procedure is performed in the **Asset Editor**.

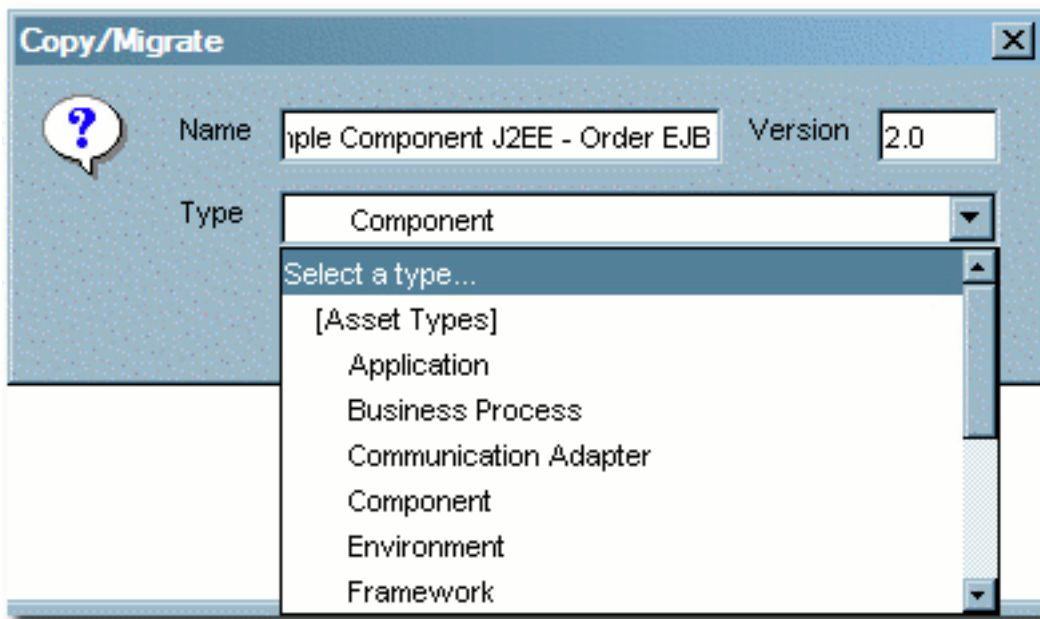
1. Use **Search** or browse the **Asset Editor** file tree to locate the source asset or compliance template to be migrated.



2. Select **Copy/Migrate** in the **File** menu.



The **Copy/Migrate** pop-up opens

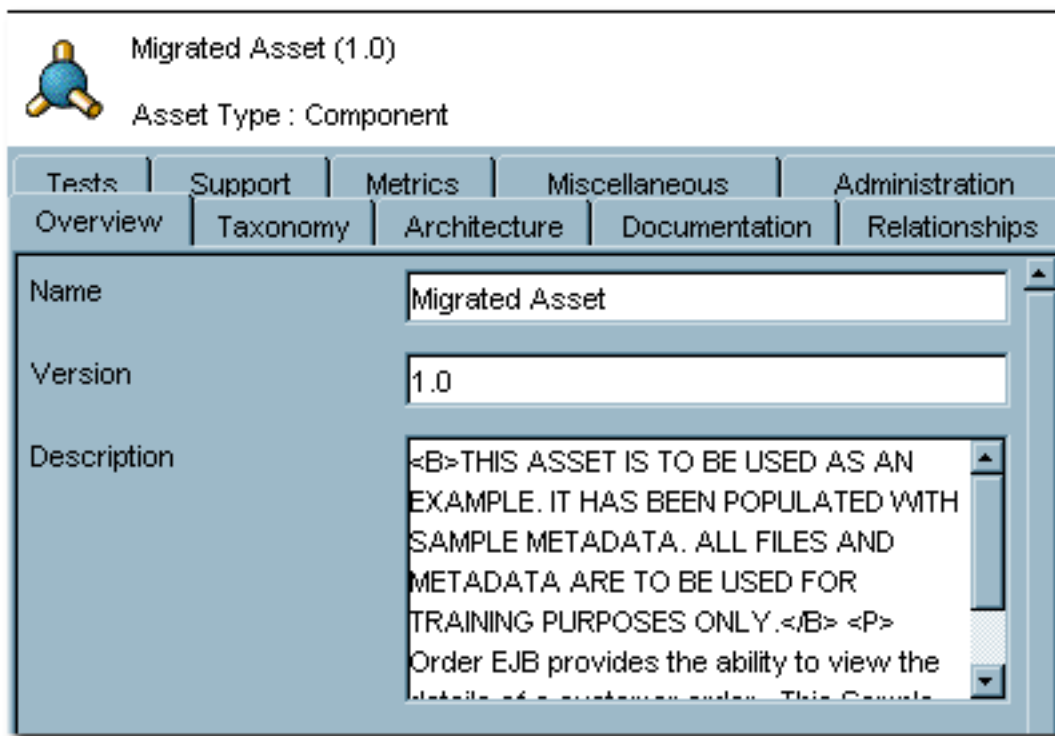


3. Enter the appropriate information in the **Name** and **Version** text boxes.
4. Select the destination **Type** (the type to which the source artifact is to be migrated) in the **Type** drop-down.

Migrating assets between dissimilar types will affect the display of asset information in the asset detail and in the **Asset Editor**.

5. When finished, click **OK**.

The migrated asset appears in the **Asset Editor**.



The image shows a software window titled "Migrated Asset (1.0)". At the top left is a logo consisting of three blue spheres connected by yellow lines. To the right of the logo, the text "Migrated Asset (1.0)" is displayed. Below this, the text "Asset Type : Component" is shown. The window has a tabbed interface with two rows of tabs. The first row contains "Tests", "Support", "Metrics", "Miscellaneous", and "Administration". The second row contains "Overview", "Taxonomy", "Architecture", "Documentation", and "Relationships". The "Administration" tab is currently selected. The main content area is divided into three sections: "Name" with a text field containing "Migrated Asset", "Version" with a text field containing "1.0", and "Description" with a text area containing the following text: "THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. <P> Order EJB provides the ability to view the details of a customer order. This example".

Migrated Asset (1.0)

Asset Type : Component

Tests | Support | Metrics | Miscellaneous | Administration

Overview | Taxonomy | Architecture | Documentation | Relationships

Name: Migrated Asset

Version: 1.0

Description: THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. <P> Order EJB provides the ability to view the details of a customer order. This example

6. Click the new asset's **Administration** tab.

Tests
Support
Metrics
Miscellaneous
Administration

Created

Created By: User, Joe
Created Date: 15 Feb 2006 02:1...

Submitted

Submitted By: Smith, John
Submitted Date: 15 Feb 2006 02:...

Accepted

Accepted By: Smith, John
Accepted Date: 15 Feb 2006 02:...

Assign Users

Assigned To	Assigned Date

Add
Delete
Email Assigned Users

Registered

Registered By:
Registered Date:
Register

7. Register the new asset or assign it to another user for registration.
8. Save the asset.

File
View
Actions
Help

New
Ctrl+N

Save
Ctrl+S

Copy/Migrate

Add Note
Ctrl+F2

Exit
Ctrl+X

Asset Registration Status

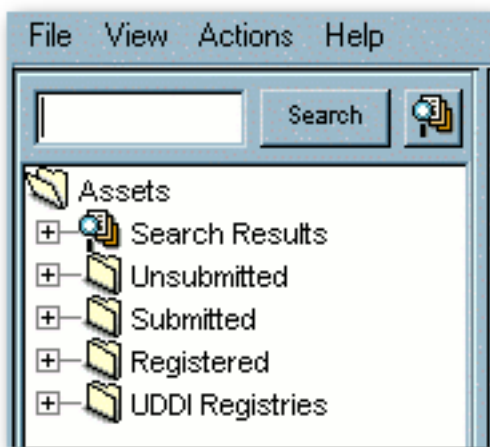
The registrar may assign a status to the asset using the **Administration** tab in the **Asset Editor**.

- **Active**
 - The status assigned to any asset that is available for use.
- **Inactive**
 - The status assigned to any asset in the repository but unavailable for general use. An inactive asset can be re-activated or retired. Inactive assets show up in a search, but cannot be selected for use (the **Use - Download** button is not displayed).
- **Retired**
 - The status assigned to any asset in the repository that is retired from general use. A retired asset can be re-activated or made inactive. Retired assets cannot be selected for use (the **Use - Download** button is not displayed), nor will they show up in a search; however, they will still be available as related assets to active or inactive assets in the repository.
- **Deleted**
 - The status assigned to any asset that is removed from the repository. Deleted assets cannot be recovered or have their status reassigned.

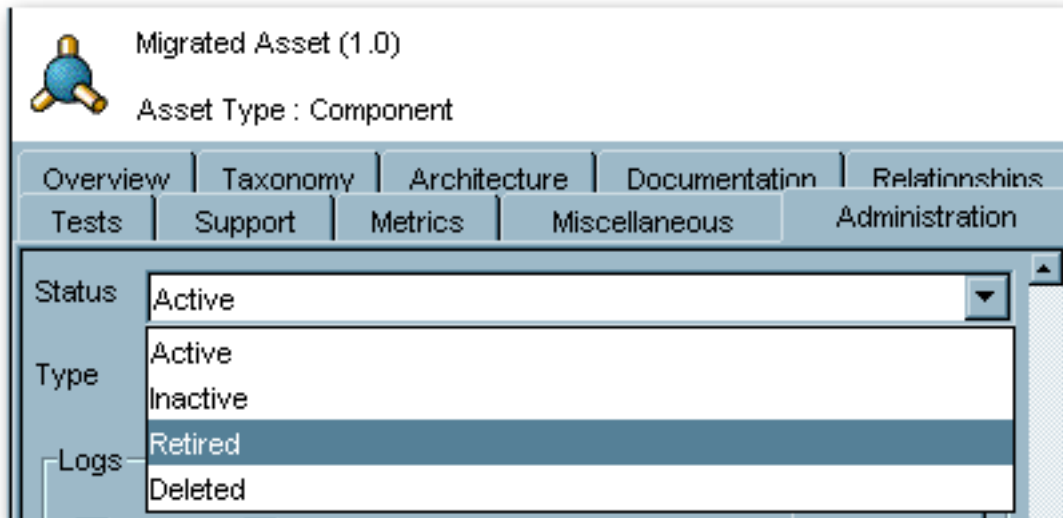
Assigning or Changing an Asset's Status

This procedure is performed in the **Asset Editor**.

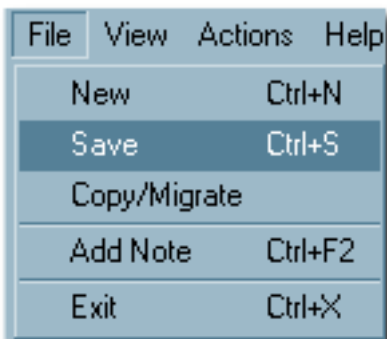
1. Use **Search** or browse the **Asset Editor** file tree to locate the source asset or compliance template to be migrated.



2. Click the **Administration** tab
3. In the **Status** drop-down list, select the status to be assigned to the asset.



4. Save the asset.

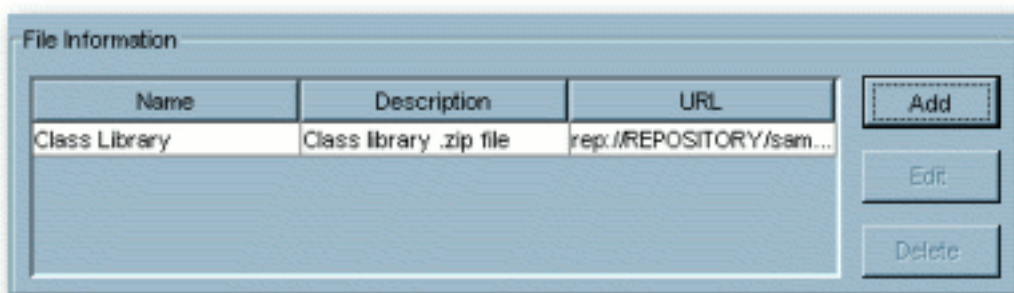


Note: Depending on the assigned status, the asset may disappear from the tree (**Deleted**) or be unavailable for user searches (**Retired**).

Adding Files to an Asset

This procedure is performed in the BEA AquaLogic Enterprise Repository **Asset Editor**.

1. Use **Search** or other means to locate the asset to which a file will be added.
2. Locate the **File Information** element on the **Overview** tab.



The 'File Information' dialog box contains a table with the following data:

Name	Description	URL
Class Library	Class library .zip file	rep://REPOSITORY/sam...

Buttons on the right side of the dialog include 'Add', 'Edit', and 'Delete'.

3. Click the **Add** button.

The **Edit** pop-up opens.

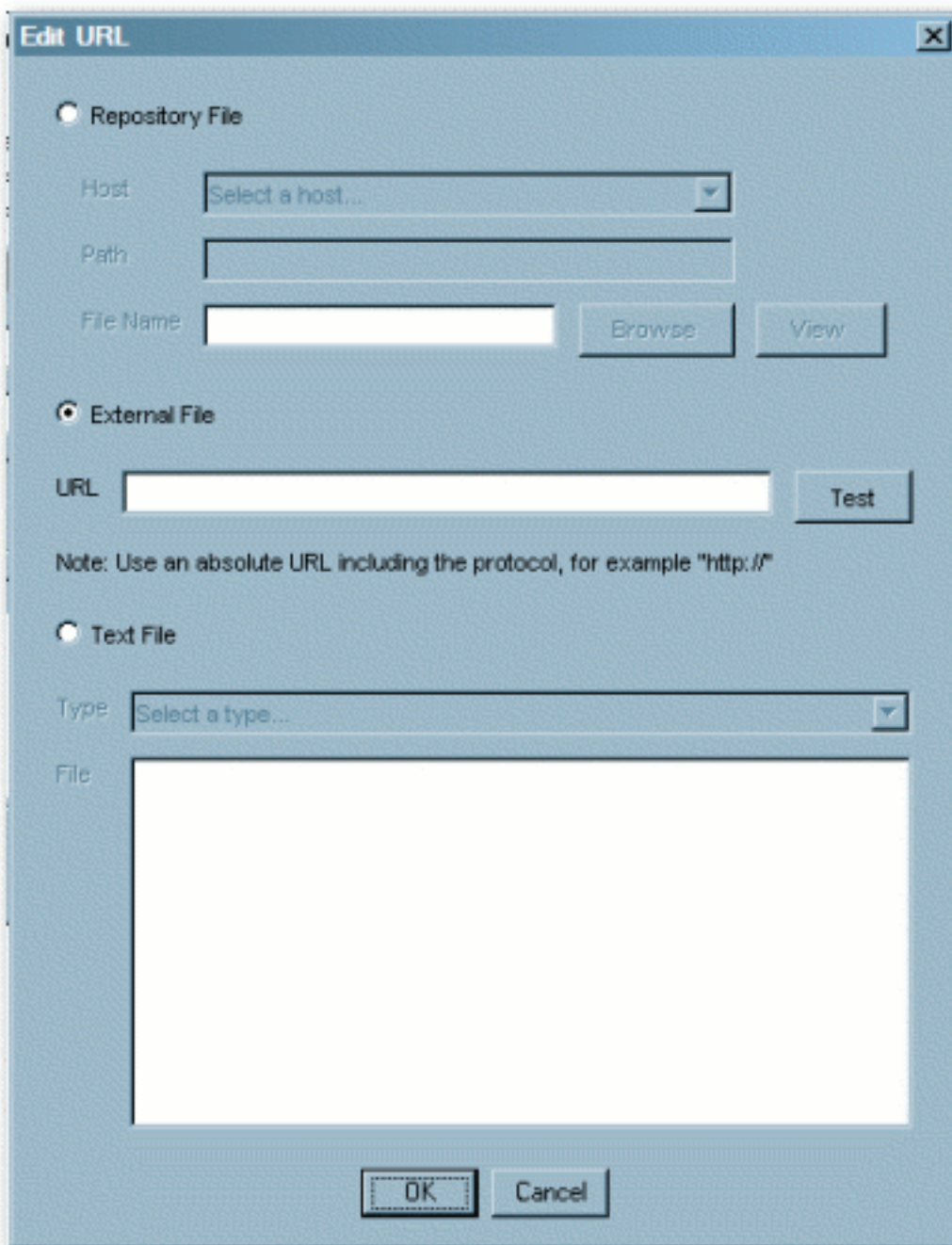


The 'Edit' dialog box has the following fields and controls:

- Text boxes for 'Name', 'Description', and 'URL'.
- A 'View Access' button.
- A 'Custom Access Settings' section with 'Available' and 'Selected' lists.
- 'OK' and 'Cancel' buttons at the bottom.

4. Fill in the **Name** and **Description** text boxes.
5. Click the **Edit** button (next to the **URL** field).

The **Edit URL** pop-up opens.

The image shows a Windows-style dialog box titled "Edit URL". It has three radio buttons for selection: "Repository File", "External File", and "Text File". The "Repository File" section includes a "Host" drop-down menu (showing "Select a host..."), a "Path" text box, and a "File Name" text box with "Browse" and "View" buttons. The "External File" section includes a "URL" text box and a "Test" button. Below this is a note: "Note: Use an absolute URL including the protocol, for example 'http://'". The "Text File" section includes a "Type" drop-down menu (showing "Select a type...") and a large "File" text area. At the bottom are "OK" and "Cancel" buttons.

Edit URL

☐ Repository File

Host:

Path:

File Name:

☒ External File

URL:

Note: Use an absolute URL including the protocol, for example "http://"

☐ Text File

Type:

File:

6. Use the radio buttons to select the source of the file to be added.

- **Repository File**

1. Select an item from the **Host** drop-down. (Configuration determines available selections.)

2. As necessary:

- Enter the appropriate `additionalPathStructure/fileName` in the **Path** text box, or...

- Click the **Browse** button to browse to the file to be added.

- **External File**

1. Enter the file URL in the **URL** text box
2. Click **Test** to verify that the URL is valid.

7. If necessary, a supplementary text file may be created and added to the file:

1. Click the **Text File** radio button.
2. Select the type of text file from the **Type** drop-down.
3. Enter text as necessary in the **File** text box.

8. When finished, click **OK** to close the **Edit URL** pop-up.

9. Click **OK** to close the **Edit** pop-up.

The added file will now appear in the list in the **File Information** element.



Working With UDDI Registries

Overview

The **Asset Editor** also enables access to UDDI from the tree. UDDI (Universal Description, Discovery and Integration) enables organizations to quickly, easily, and dynamically find assets on the Web and use them in their own initiatives. The UDDI Registry implements the UDDI specification and is the access point for external searches of the Internet or your organization's internal UDDI directory.

Access to and from the **UDDI Registry** is performed using SOAP (Simple Object Access Protocol); other protocols may be used.

The **UDDI Registry** enables the addition of new Web services or other assets that your organization may find valuable over the course of time. Importing an item through the UDDI Registry places it in the **Queued** folder for the selected asset type; subsequently, the item or service undergoes the same submission and approval process as any internal item or service.

The information registered in the UDDI Registry includes:

- **Business entity**
 - The business entity represents information about a business to which a service or asset belongs. The entity contains unique identifiers, the business name, a description of the business, basic contact information, and a URL that points to more information about the business.
- **Service entity**
 - The service entity is a list of the business services offered by the business entity. Each entry contains a description of the service, categories that describe the service, and pointers to reference information related to the service.

- **Specification pointers**

- Specification pointers are a list of binding templates that point to specifications about the service, and associate the service with a service type.

- **Service types**

- Service types are defined by tModels, which specify information such as the tModel name, the name of the organization that published it, a list of categories that describe the service type, and pointers to technical specifications for the service type.

Access to the UDDI feature depends on the options purchased or included with your specific instance of BEA AquaLogic Enterprise Repository.

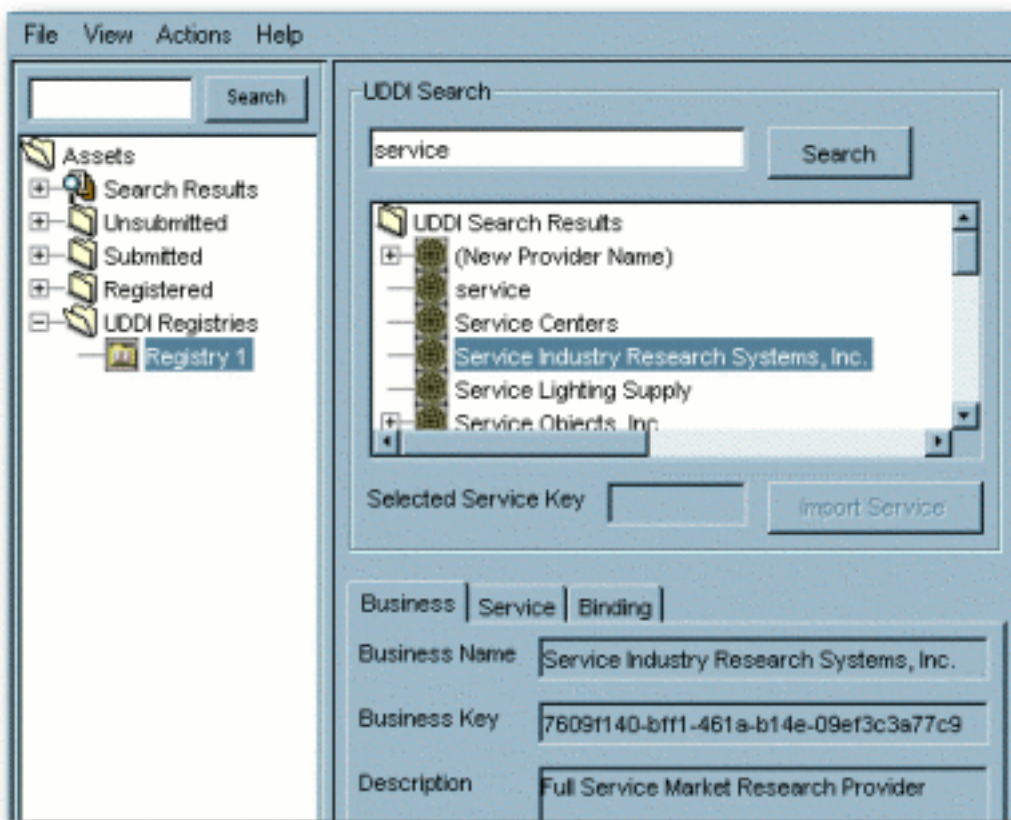
Using the UDDI Registry

Use the UDDI Registry to search for services and then import them into BEA AquaLogic Enterprise Repository. (The UDDI Registry option must be enabled.)

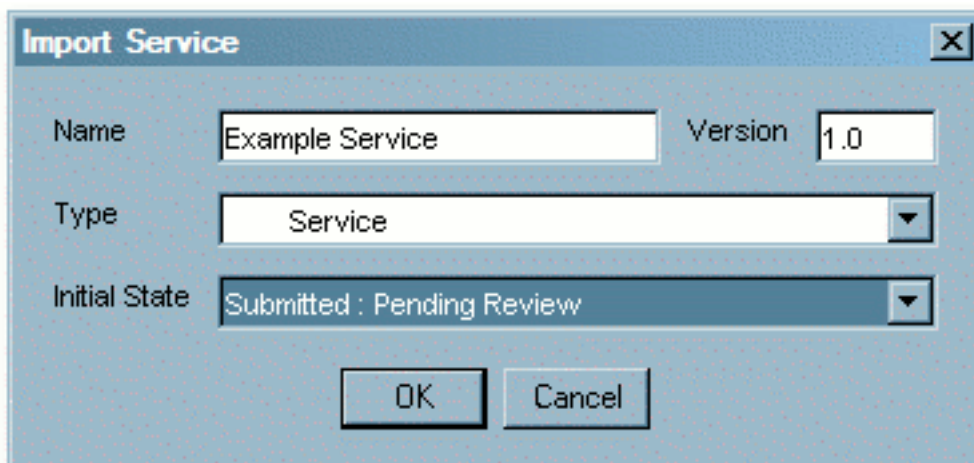
This procedure is performed in the **Asset Editor**.

1. Open the **UDDI Registries** folder in the tree.
2. Select a UDDI registry.

The selected UDDI registry opens in the **Asset Editor**.



3. Enter a search term in the **Search** text box.
4. Click the **Search** button.
5. Select a service from the list of results.
6. Click **Import Service**.
7. In the **Import Service** dialog box, enter a name and version number for the service, and select an asset type.



8. When finished, click **OK**.

The service or item appears in the tree, in the **Submitted** queue, under the assigned asset type.

9. Proceed with asset registration.

The Producing Projects Feature

Overview

The **Producing Projects** feature tracks and reports on assets that were produced by projects. This level of traceability is essential to understanding and evaluating the return on investment in individual projects and in the project portfolio. The **Producing Projects** element appears in the detail display of assets.

This feature is standard in the base BEA AquaLogic Enterprise Repository product.

Adding a Producing Project to an Asset

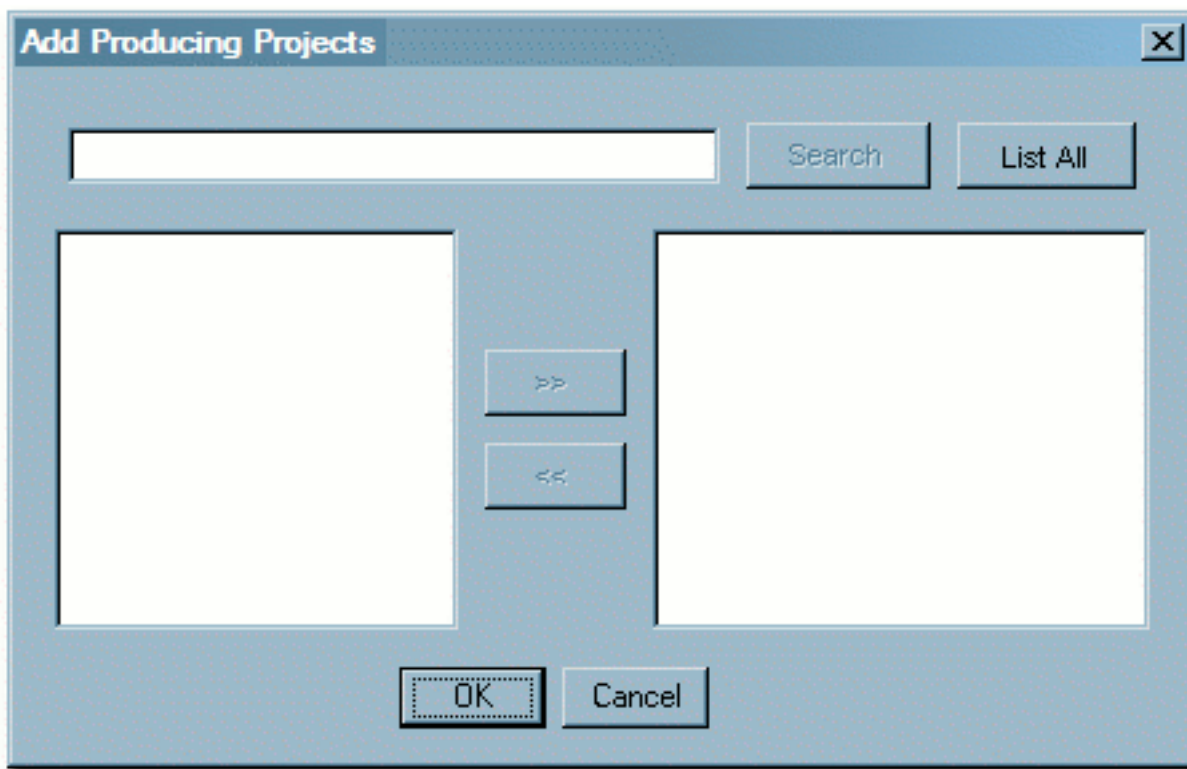
This procedure is performed in the **Asset Editor**.

1. Select the asset to which the Producing Project is to be added.
2. Click the **Add** button in the **Producing Projects** section on the **Overview** tab.



The **Add Producing Projects** pop-up opens.

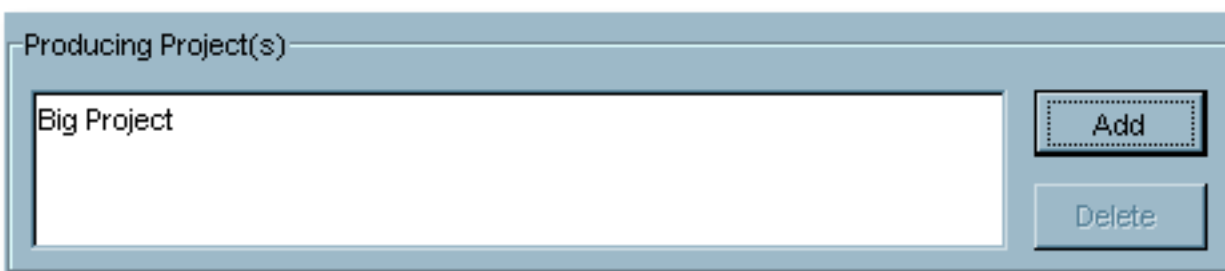
3. Click the **List All** button in the **Add Producing Projects** pop-up to display a list of available projects in the left window.



Projects can also be located by using the Search function in the **Add Producing Projects** pop-up.

4. Select the appropriate project and use the arrow button (>>) to move the project to the window on the right.
5. Click **OK** to close the **Add Producing Projects** pop-up.

The selected project is listed in the **Producing Projects** section on the **Overview** tab.



6. Save the asset and exit the **Asset Editor**.

The selected project now appears in the **Producing Project(s)** section in the asset detail in the **Assets** section of BEA AquaLogic Enterprise Repository.

Producing Project(s)

Producing Projects:
Example Project



Using the Type Manager

Overview

Understanding Types

Each artifact in BEA AquaLogic Enterprise Repository falls under one of three general headings:

- **Asset**
- **Compliance Template**
- **Policy**

Each of these headings is represented by a variety of **Types**:

- **Asset Types**
- **Compliance Template Types**
- **Policy Types**

These **Types** are patterns, various instances of which are created to accomodate the diverse artifacts that can be managed within BEA AquaLogic Enterprise Repository. For example:

- **Application** is an instance of an **Asset Type**.
- **Project Profile** is an instance of a **Compliance Template Type**.
- **Regulatory Compliance Policy** is an instance of a **Policy Type**.

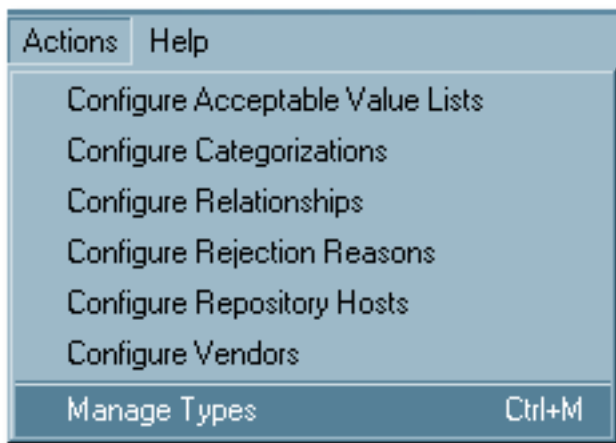
Types determine both the display of information for, and the taxonomy of, all of the artifacts (assets/compliance templates/policies) in BEA AquaLogic Enterprise Repository. BEA AquaLogic Enterprise Repository ships with several **Types**. These may be modified, or new types can be created using the **Type Manager**.

The **Type Manager** controls the organization and display of information for each artifact as it appears in the **Asset Editor** and in the **Asset Detail**.

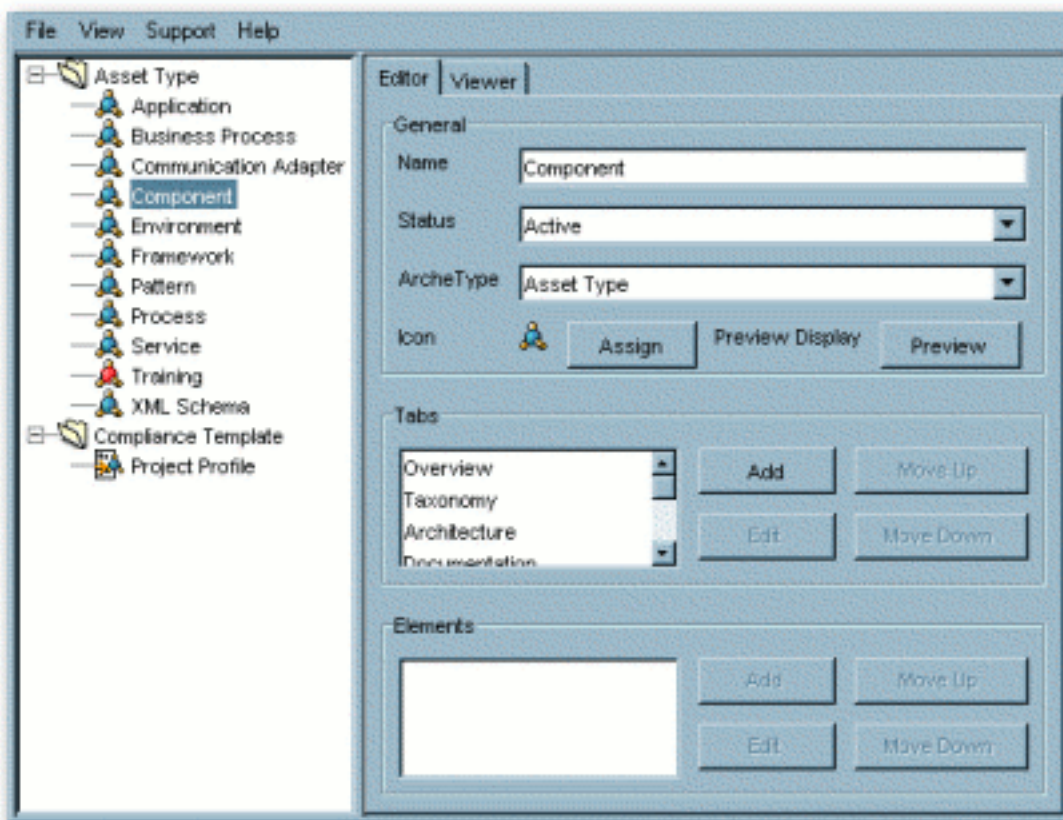
Launching the Type Manager

This procedure is performed in the **Asset Editor**.

1. Select **Manage Types** in the **Actions** menu.



The **Type Manager** opens.



2. Select an asset type or compliance template from the tree to view/edit its configuration.

Type Manager Views

Each type has an **Editor** and a **Viewer**.

Information relevant to the configuration of the **Editor** and the **Viewer** views for each type is stored in XML files in the database. The **Type Manager** loads the XML files into a GUI, which enables the creation, modification, and deletion of types. After the type is saved, the data is assembled in XML and loaded into the database.

The Editor

The **Editor** controls the organization and display of information for assets/compliance templates of the particular type as they appear in the **Asset Editor**.

The screenshot shows a software interface titled 'Editor' with a 'Viewer' tab. The 'General' section contains fields for 'Name' (Component), 'Status' (Active), and 'ArcheType' (Asset Type). Below these are an 'Icon' field with a small icon, an 'Assign' button, a 'Preview Display' button, and a 'Preview' button. The 'Tabs' section features a list box with 'Overview', 'Taxonomy', 'Architecture', 'Documentation', 'Relationships', and 'Tests'. To the right of the list are buttons for 'Add', 'Move Up', 'Edit', 'Move Down', and 'Remove'. The 'Elements' section has a large empty text area and buttons for 'Add', 'Move Up', 'Edit', 'Move Down', 'Remove', and 'Move to Tab'.

The **Editor** display is divided into three sections:

- **General**

- Includes the type name, the usage status selector, the type icon selector, and a **Preview** button, which displays the asset or compliance template type as seen via the **Asset Editor**.

- **Tabs**

- Includes a list of available tabs for the type. These tabs correspond to tabs displayed in the **Asset Editor** view of an asset/compliance template. Click on any listed tab to display its elements in the **Elements** section, just below the **Tabs** section.

- **Elements**

- The elements of any tab listed in the **Tabs** section are displayed here when the item is clicked.

Several buttons appear to the right of the **Tabs** and **Elements** sections:

- **Add**
- **Edit**
- **Remove**
- **Move Up**
- **Move Down**

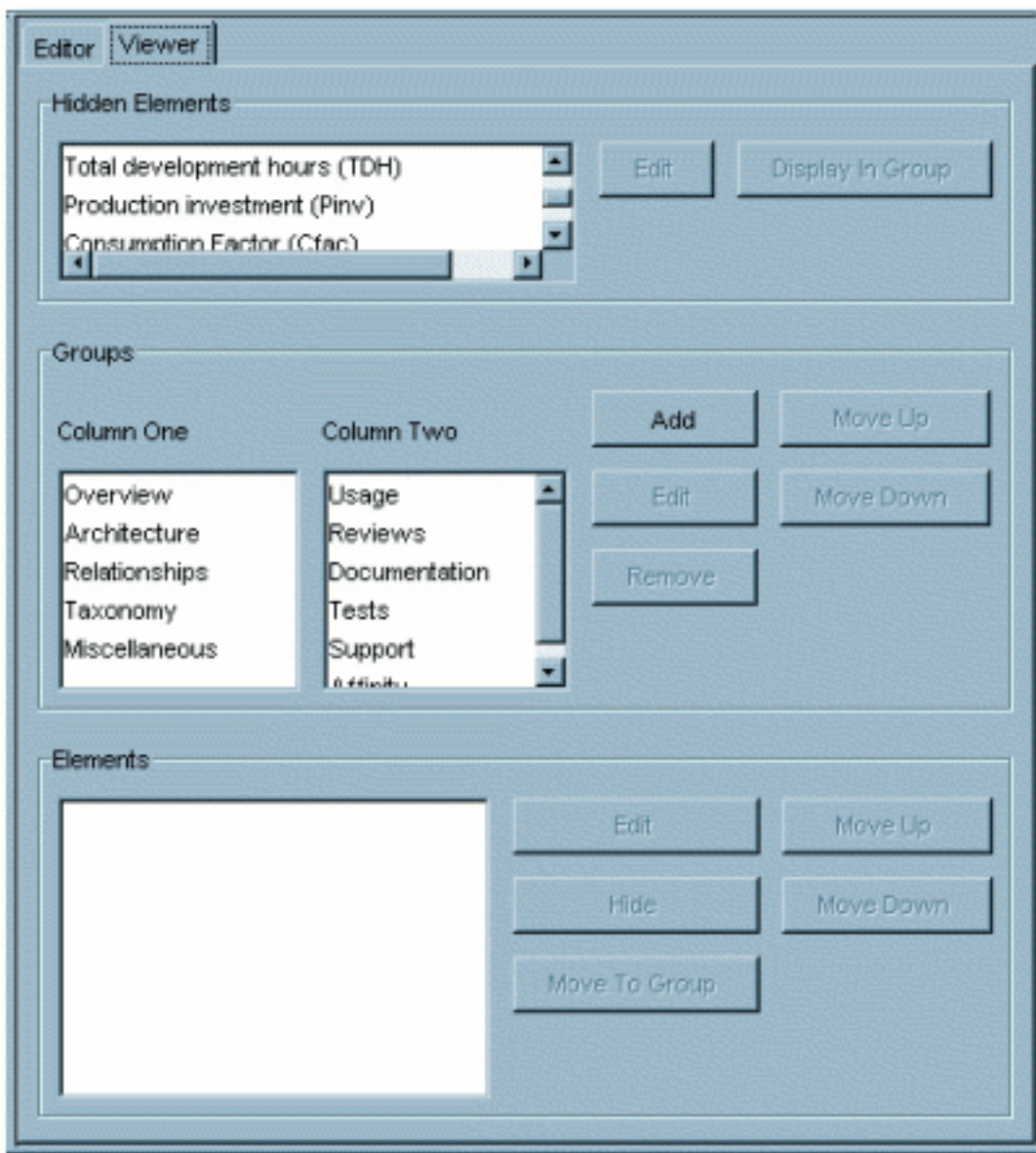
These actions may be applied to any item listed in the **Tabs** or **Elements** sections. Simply select the item, and then click the appropriate button.

The elements listed below are required for valid **Types**. They may be renamed, but cannot be removed from a type.

- **Name**
- **Version**
- **Description**
- **File information**
- **Notification Email**
- **Keywords**

The Viewer

The **Viewer** controls the organization and display of information for assets/compliance templates of the particular type as they appear in the **Assets** section of BEA AquaLogic Enterprise Repository (the general user view of asset/compliance template information).



The **Viewer** display is divided into three main sections:

- **Hidden Elements**

- Lists all elements available for display.
 - Use the **Edit** button (on the right) to change the configuration of any listed element.
 - Use the **Display in Group** button to assign the element to one of the two columns in the main asset display in BEA AquaLogic Enterprise Repository.

- **Groups**

- Includes **Column One** and **Column Two**. These correspond to the two main columns in the main asset display in BEA AquaLogic Enterprise Repository.

Use the buttons on the right to configure the elements in the respective columns.

- **Elements**

- Click on any item in **Groups -- Column One** or **Groups -- Column Two** to display the respective item's elements in the Elements section. Use the buttons on the right to configure these elements.

Use Caution! Changes made to Types affect the display of all assets assigned to that type.

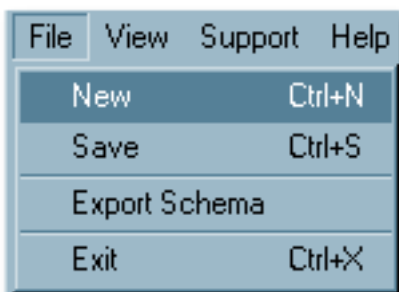
Creating a New Type

Caution: Adding an asset/compliance template type constitutes a permanent change to the BEA AquaLogic Enterprise Repository system.

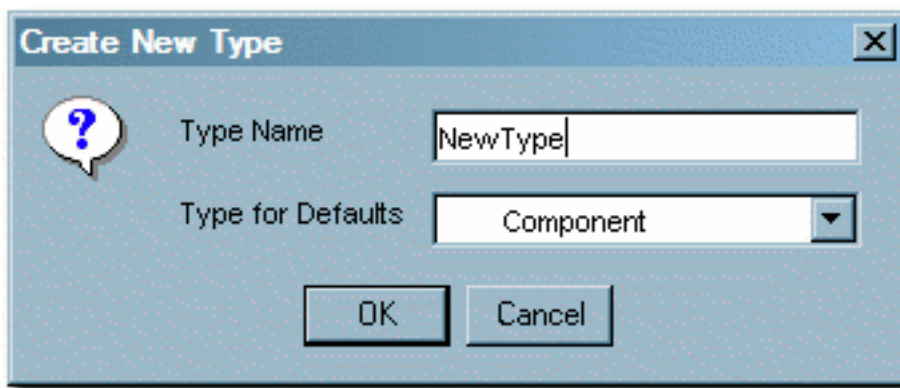
In order to preserve database integrity, only **Types** to which no assets are currently associated may be deleted.

Note: This action may alter reuse measurements.

1. Select **New** in the **File** menu.



The **Create New Type** pop-up opens.



2. Enter the appropriate information in the **Type Name** text box.
3. In the **Type for Defaults** drop-down, select one of the existing **Types** as the basic template for the new type.
4. Click **OK**.

The new **Type** appears in the tree.



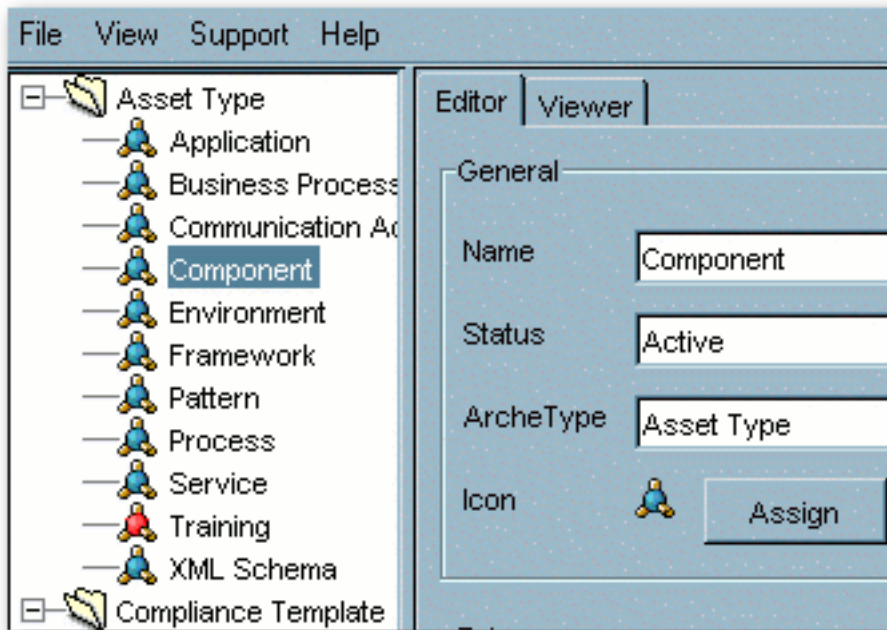
Configuring Tabs to Support Registration Workflow

Overview

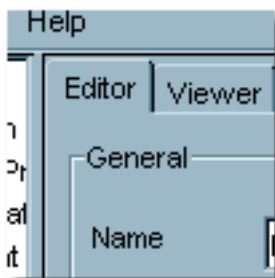
Tabs should be positioned on a Type in a logical sequence that accommodates the registration workflow. For example, in the **Framework** asset type (shipped with BEA AquaLogic Enterprise Repository), it is intuitive to complete the **General** information first. The **Documentation** and **Testing** tabs, being very similar, are located near each other. The actual registration step, the last in the workflow process, is performed on the **Administration** tab. For that reason the **Administration** tab is system generated and intentionally fixed in its position.

Adding Workflow Tabs

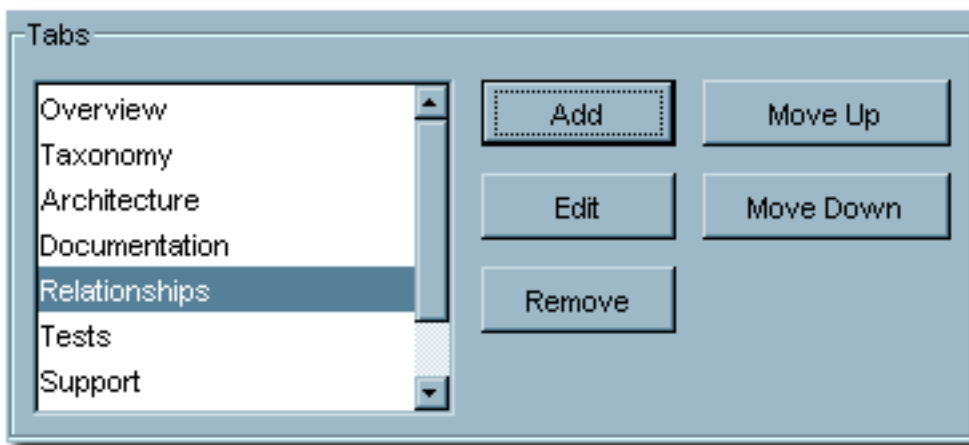
1. Select the Type to be modified.



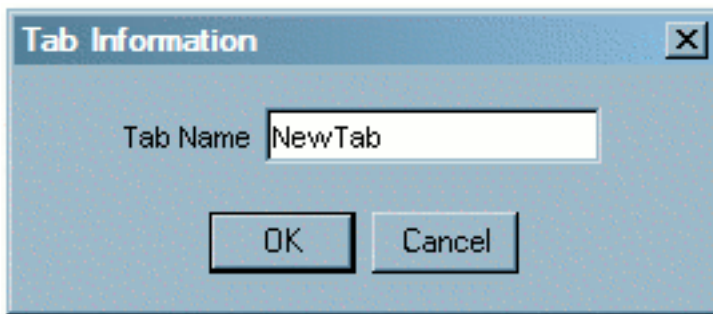
2. Select the **Editor**.



3. Click **Add** in the **Tabs** section.

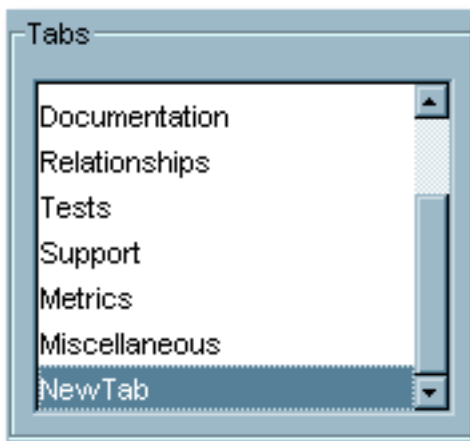


The **Tab Information** pop-up opens.

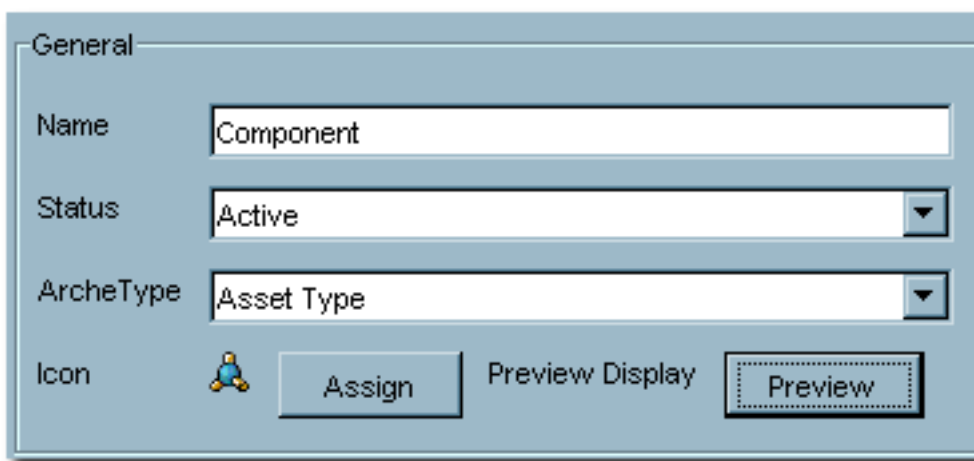


4. Enter the appropriate information in the **Tab Name** text box.
5. Click **OK**.

The name for the new tab appears in the **Tabs** section list.



6. Click **Preview**.




General

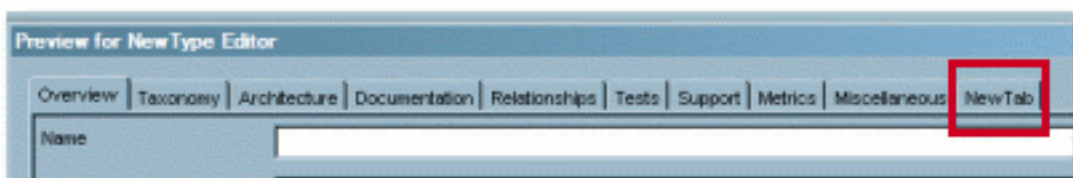
Name: Component

Status: Active

ArcheType: Asset Type

Icon:  Assign Preview Display Preview

The preview pop-up opens. The new tab is displayed.



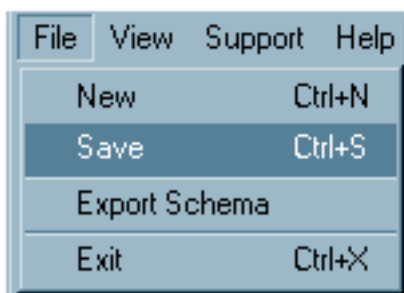
Preview for NewType Editor

Overview | Taxonomy | Architecture | Documentation | Relationships | Tests | Support | Metrics | Miscellaneous | **NewTab**

Name:

7. Close the **Preview** pop-up.

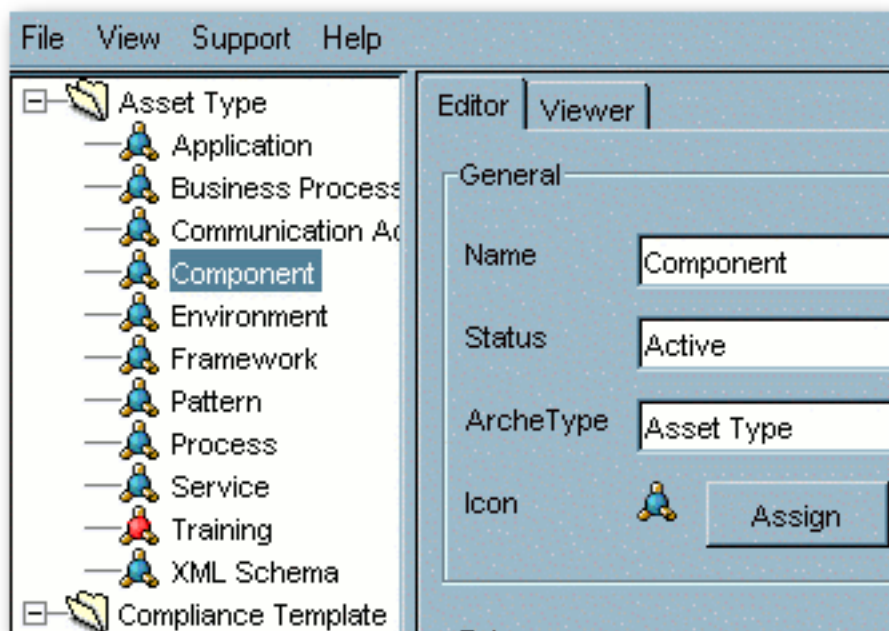
8. Save the changes.



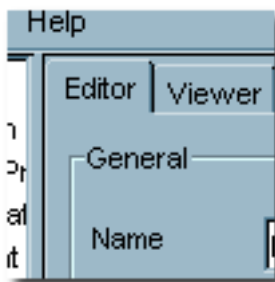
File	View	Support	Help
New		Ctrl+N	
Save		Ctrl+S	
Export Schema			
Exit		Ctrl+X	

Change the Position of a Tab

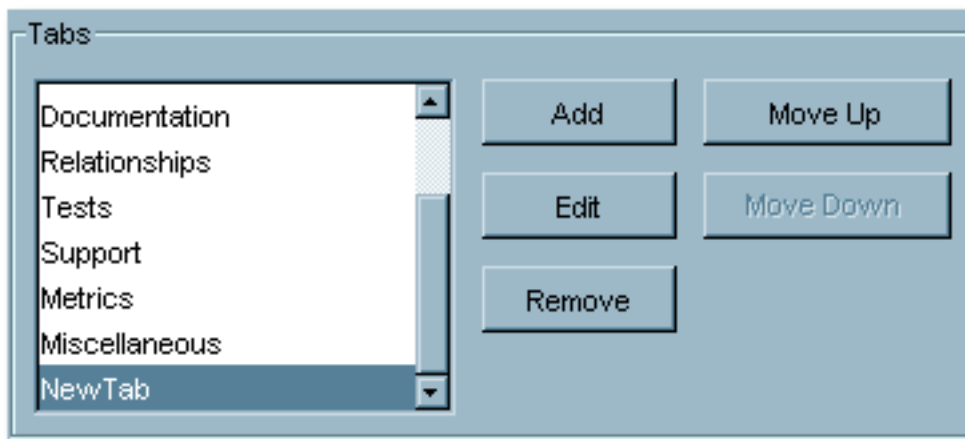
1. Select the Type to be modified.



2. Select the **Editor**.

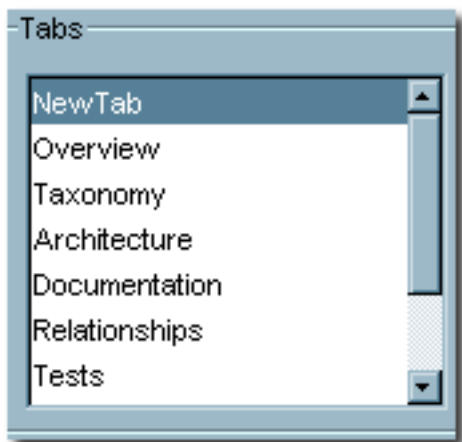


3. Select the tab to be moved.

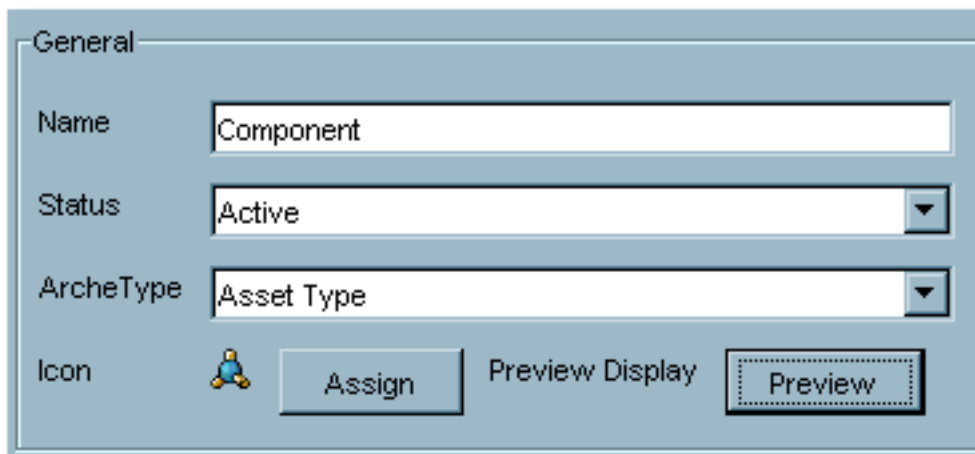


4. Click **Move Up** or **Move Down**, as appropriate.

Each click moves the tab one level. This example moves the selected tab from the bottom to the top of the list.



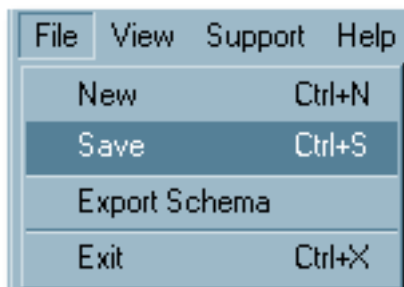
5. Click **Preview**.



The preview pop-up opens. Note new position of the tab.

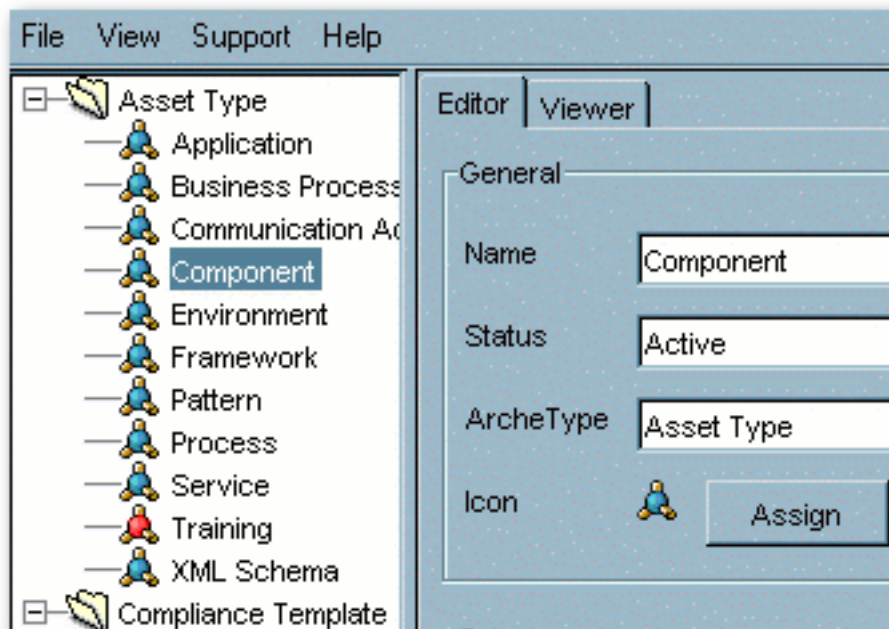


6. Save the changes.

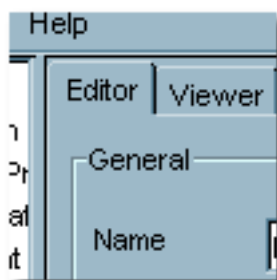


Editing Workflow Tabs

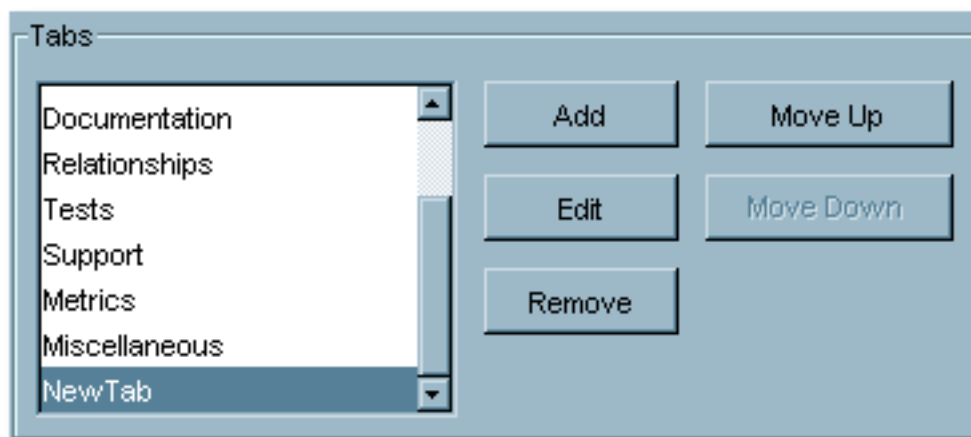
1. Select the Type to be modified.



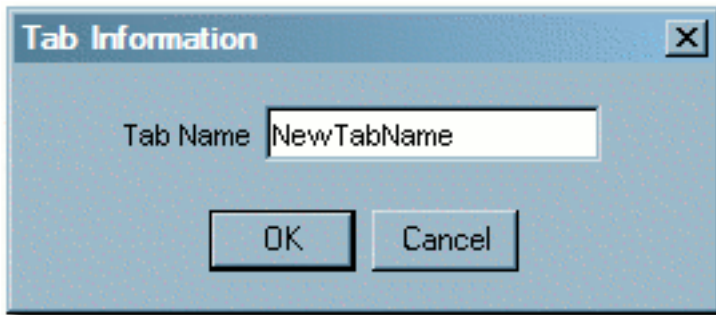
2. Select the **Editor**.



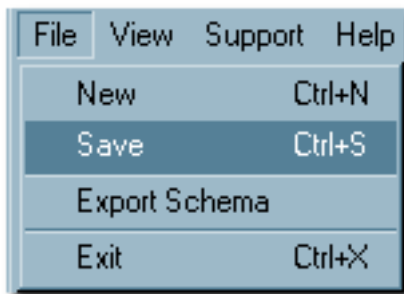
3. Select the tab to be edited.



4. Click **Edit**.
5. Rename the tab.



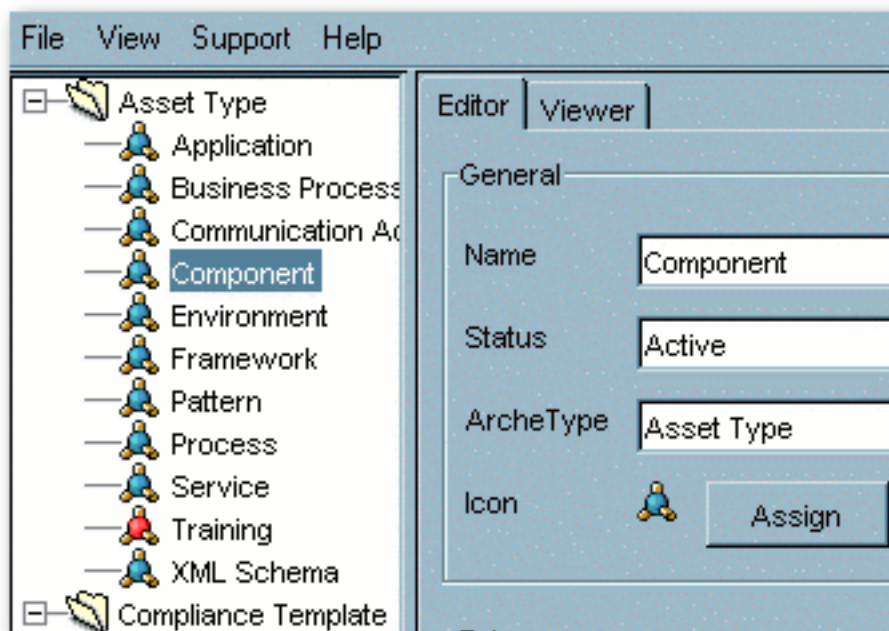
6. Click **OK**.
7. Save the changes.



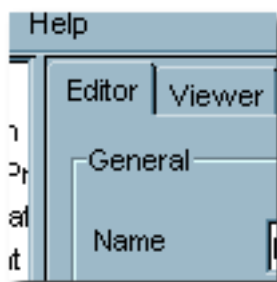
Deleting Workflow Tabs

Note: Deleting a tab deletes all data associated with the tab.

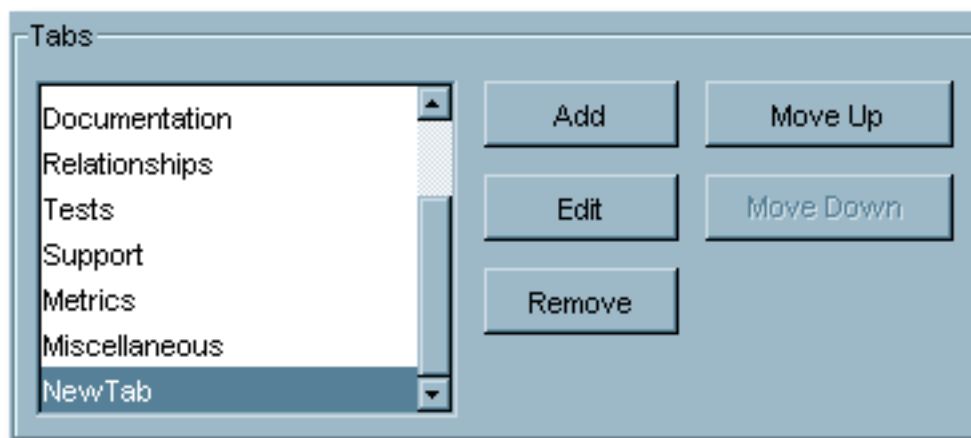
1. Select the Type to be modified.



2. Select the **Editor**.

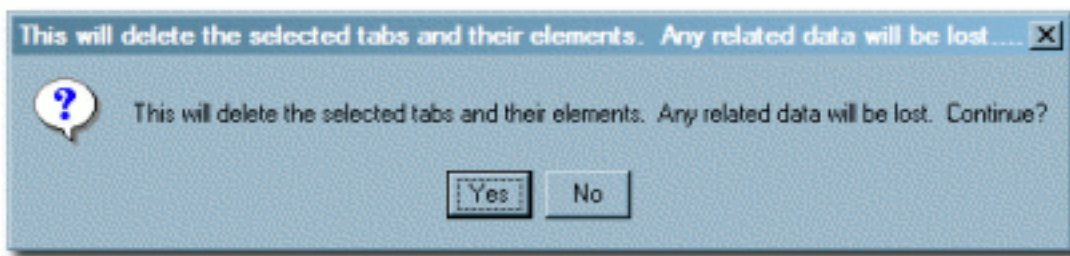


3. Select the tab to be deleted.



4. Click **Remove**.

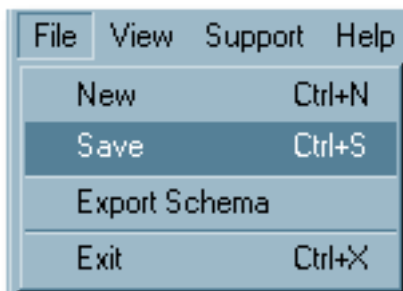
A confirmation pop-up appears.



5. Click **Yes**.

The tab is deleted, and no longer appears in the tabs list or in the preview.

6. Save the changes.



Important

All tabs may be deleted from a type, with the exception of those containing any of the following required elements:

- **Name**
- **Version**
- **Description**
- **File information**
- **Notification Email**
- **Keywords**

The system prevents the deletion of any tab containing any of these elements. In order to delete a tab containing any of these elements the elements must first be moved to another tab.

Tab Elements

A variety of **Elements** can be added to tabs to accommodate the management and presentation of asset metadata. Some of these **Elements** are single-use: they are used only once in a type. Once assigned, single-use elements no longer appear in the list of available elements. The properties for each element type are listed below.

- **Text field** -- contains data strings
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Indexed**
 - If checked, the field appears in advanced searches for that type.
 - **Maximum Length**
 - A validation rule for the maximum length of data in the field; accepts numerical entries.
- **Numeric text field** -- contains a single numeric value
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Indexed**
 - If checked, the field appears in advanced searches for that type.
 - **Maximum Length**
 - A validation rule for the maximum length of data in the field; accepts numerical entries.
- **Date field** -- contains a single date value
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Indexed**
 - If checked, the field appears in advanced searches for that type.
- **URL** -- contains a string that links to a URL
 - **Display Name**
 - Element label that appears in the **Asset Editor**.

- **Required**
 - If checked, the field must be populated with data before the asset is saved.
- **Indexed**
 - If checked, the field appears in advanced searches for that type.
- **Check box** -- contains a two-value checkbox that is either on or off.
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Checked by Default**
 - If **Yes** is selected, the check box is automatically checked on new assets of the same type.
- **Drop-down box** -- contains a list of finite items
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Indexed**
 - If checked, the field appears in advanced searches for that type.
 - **Acceptable Values**
 - List of available data that populates the drop-down list; the **Configure** button enables configuration of the values.
- **Editable list** -- contains items that are either data or numerical values
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Indexed**
 - If checked, the field appears in advanced searches for that type.
 - **Entry Field**
 - Drop-down list of alphanumeric and numeric values; the **Configure** enables configuration of either alphanumeric or numeric values.
- **Multiple selection list** -- contains data from the configured list from which items can be selected only once
 - **Display Name**

- Element label that appears in the **Asset Editor**.
- **Required**
 - If checked, the field must be populated with data before the asset is saved.
- **Indexed**
 - If checked, the field appears in advanced searches for that type.
- **Acceptable Values**
 - List of available data that populates the drop-down list; the **Configure** button enables configuration of new or existing values.
- **Table** -- contains column and row information; columns correspond to elements, and rows correspond to data about the elements; available types include:
 - **Text field**
 - **Numeric Text Field**
 - **URL**
 - **Check box**
 - **Drop-down box**
 - **Table**
 - **Group Display Name**
 - Element label that appears in the **Asset Editor**
 - **Item Display Name**
 - Data entry area
 - **Required**
 - If checked, the field must be populated with data before the asset is saved.
 - **Elements**
 - Each element is a column of the table and follows the same rules as the element type.
- **Categorization** -- contains data relevant to the behavior of views in the **Asset Editor**; this can be used only once per type
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
 - **Categorization Type**
 - Drop-down list of various categorizations available in ALER.
- **Asset relationship** -- contains data specific to the behavior of relationships; this element type can be used only once per type to search for and establish a relationship between assets
 - **Display Name**
 - Element label that appears in the **Asset Editor**.

- **Associated files** -- contains data specific to the behavior of files; adding an associated create a link to the file
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Contact selection** -- contains data specific to the behavior of contacts; this element can be used only once per type to enable the creation of a contact or use of an existing contact
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Producing projects** -- contains data specific to the behavior of projects that produce assets as well as consume assets; this element can be used only once per type to enable producing projects.
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **JAR introspection** -- contains data specific to the behavior of JAR files; this element can be used only once per type to add a fully qualified class name to the contents of the element
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Requirement list/coupling** -- contains data specific to the behavior of requirements; the element enables coupling based on the data (alphanumeric) entered in the element
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **UDDI link** -- contains data specific to the behavior of UDDI registries; this element can be used only once per type to track a UDDI Registry URL and service key in the **Asset Editor**
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Vendor selection** -- contains data specific to the behavior of vendors. This element can be used only once per type and the names correspond to the names of the vendors configured in the Configure Vendors option in the **Asset Editor**
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Uploaded submission files** -- contains data specific to the behavior of uploaded

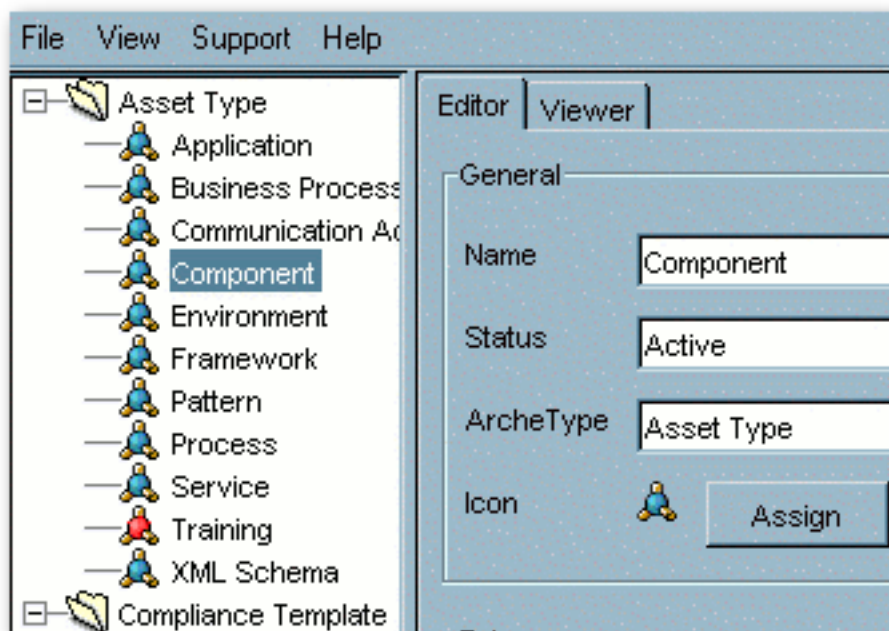
files; this element can be used only once per type to generate data based on the contents of the directory named the same as the asset ID in the upload path

- **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Forum** -- contains data specific to the behavior of forums; this element can be used only once per type
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **SFID** -- contains data relevant to the behavior of Automated Usage Tracking; this can be used only once per type
 - **Display Name**
 - Element label that appears in the **Asset Editor**.
- **Unique Element** -- contains data relevant to the behavior of Unique ID; this can be used only once per type
 - **Display Name**
 - Element label that appears in the **Asset Editor**
- **Project(s) to which template is applied** -- contains data relevant to the behavior of Compliance Templates; this can be used only once per type
 - **Display Name**
 - Element label that appears in the **Asset Editor**

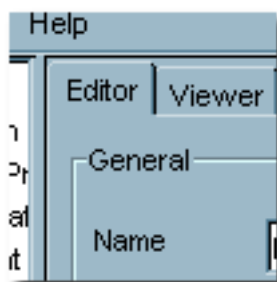
Working with Elements

Numeric Text elements contain numeric information and are often used in conjunction with reports (see above). The following example adds a Numeric Text element to the Overview tab of a Type to create a reporting field.

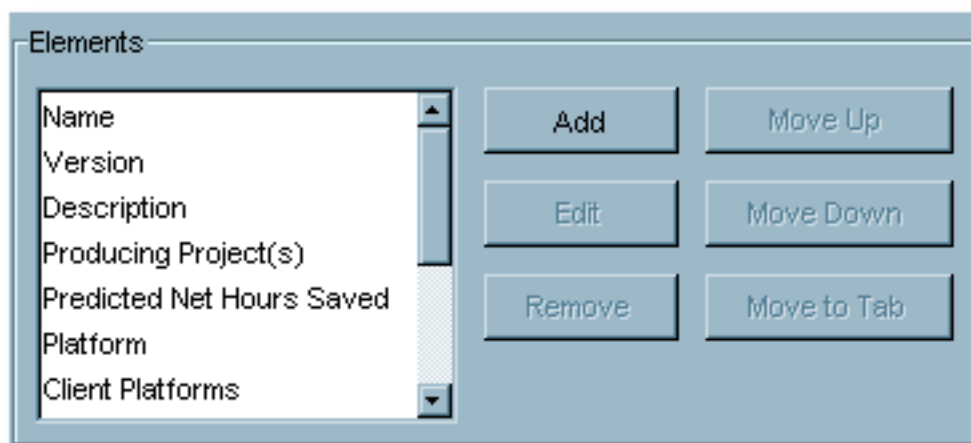
1. Select the Type to be modified.



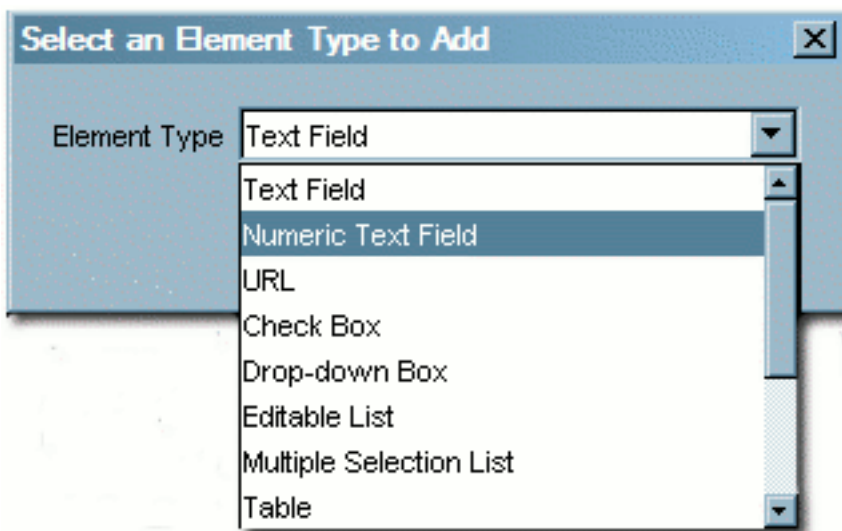
2. Select the **Editor**.



3. Click **Add** in the **Elements** section.

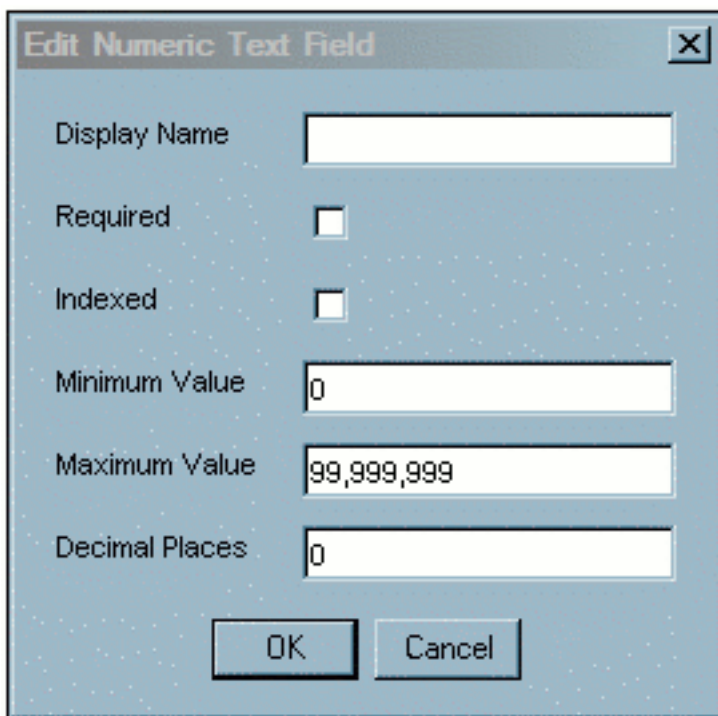


The **Select an Element Type to Add** pop-up appears.



4. Select **Numeric Text Field** from the drop down.
5. Click **OK**.

The **Edit Numeric Text Field** pop-up opens.



6. Enter the appropriate information in the **Display Name** text box.
7. Checking **Required** means that assets of this type cannot be saved (in the **Asset Editor**) until the necessary data is supplied for all fields in this element.
8. Check **Indexed** to include the element fields in BEA AquaLogic Enterprise Repository

searches.

9. Enter the appropriate information in the **Minimum Value** and **Maximum Value** fields. (See the list above for more information.)
10. When finished, click **OK**.

Adding Images for Type Manager Icons

Icon Image Requirements

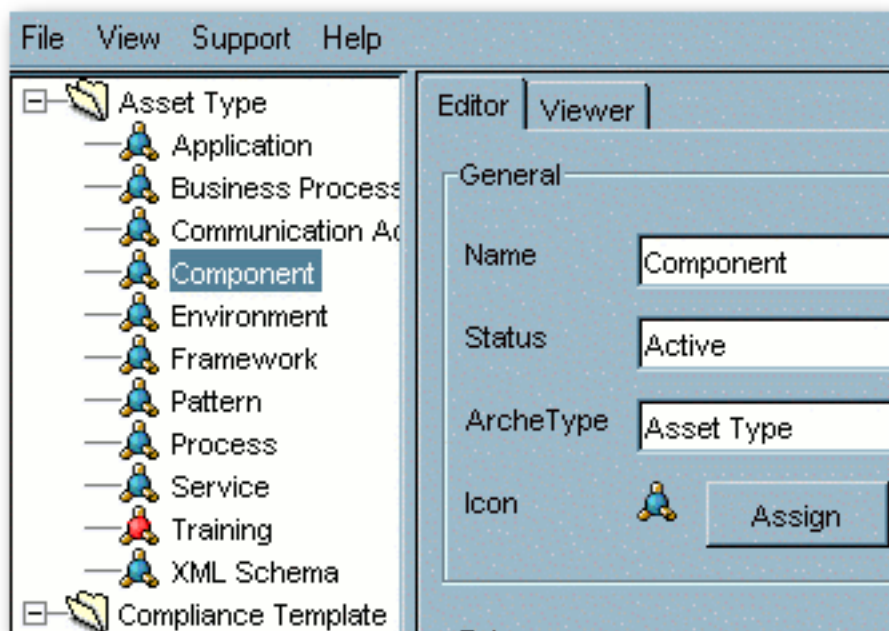
- **Size:** 16x16 pixels
- **Format:** GIF format
- **Save to:** `images/tree/enterprise/asset` subdirectory in the host directory for BEA AquaLogic Enterprise Repository installation files.

1. Locate the `icons.xml` file in the `images/tree/enterprise/asset` subdirectory.
2. Edit `icons.xml` as necessary to add icon elements for the new GIF images.
3. If it is open, close and reopen the **Asset Editor**.

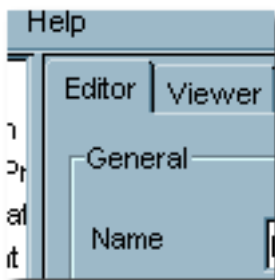
View/select available Type icons

This procedure is performed in the **Type Manager**.

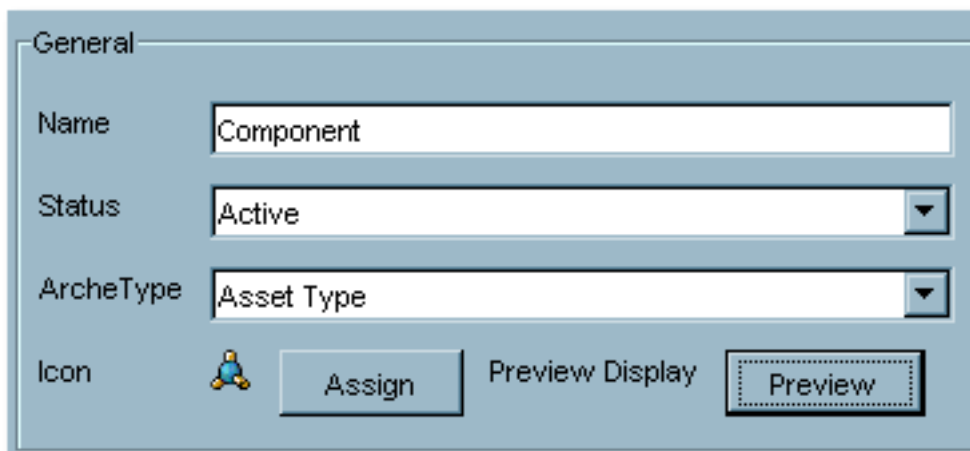
1. Select a **Type**.



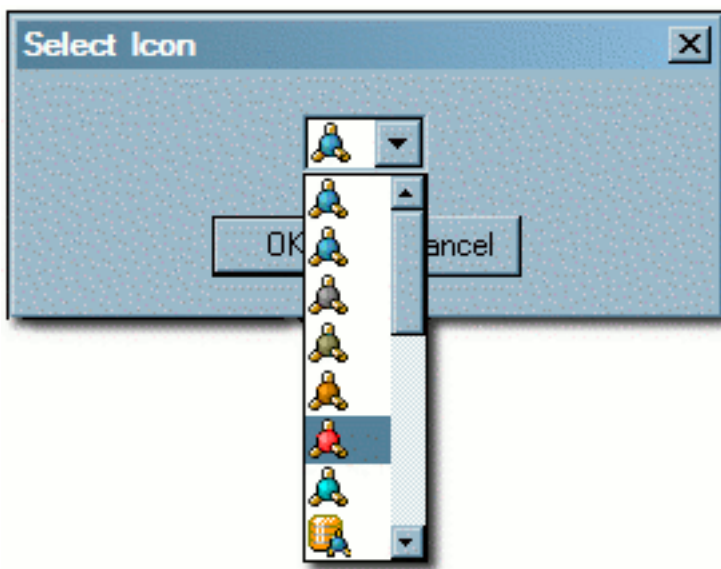
2. Select the **Editor**.



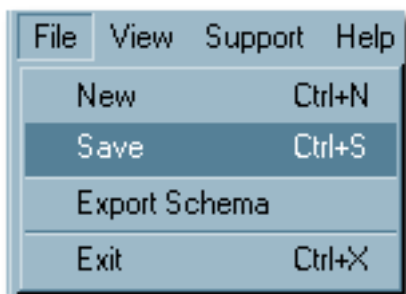
3. Click **Assign**.



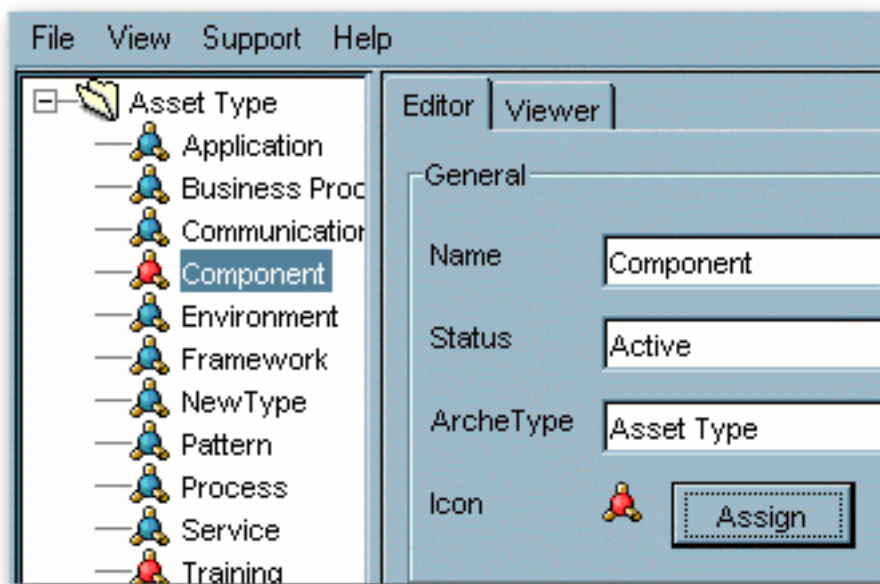
The **Select Icon** pop-up appears.



4. Select an icon from the drop-down list.
5. Click **OK**.
6. Save the changes.



The new icon appears next to the Type in the list in the sidebar.





Viewing and Editing Type XML Schemas

Overview

The **Type Manager** includes features that allow users to view and edit the XML schemas for asset types and compliance templates:

- **Export Schema**
 - Displays the XML schema for the selected asset type or compliance template.
 - Available only to users who are assigned the **Admin** role.
 - Accessed via the **File** menu in the **Type Manager**.
- **XML Editor**
 - Allows editing of XML source for the **Editor** and **Viewer** displays of an asset type or compliance template, as seen via the **Type Manager**.
 - Available to users in the **Admin** role, and to others, based on specific **System Settings**.
 - Accessed via the **Support** menu in the **Type Manager**.

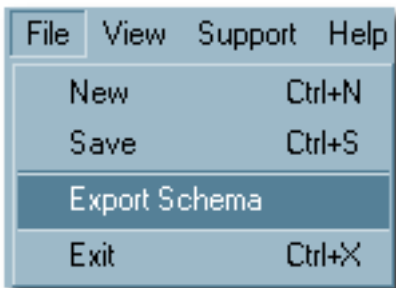
Configuration

- The **Export Schema** viewer is available only to users assigned to the **Admin** role.
- The **Support** menu displayed is determined by the following conditions:
 - If the user has **Admin** privileges.
 - The **XML Editor** option will be accessible in the **Support** menu.
 - If the property `cmee.asseteditor.allow.manual.proxy` is enabled.
 - The manual proxy configuration option will be accessible in the **Support** menu.

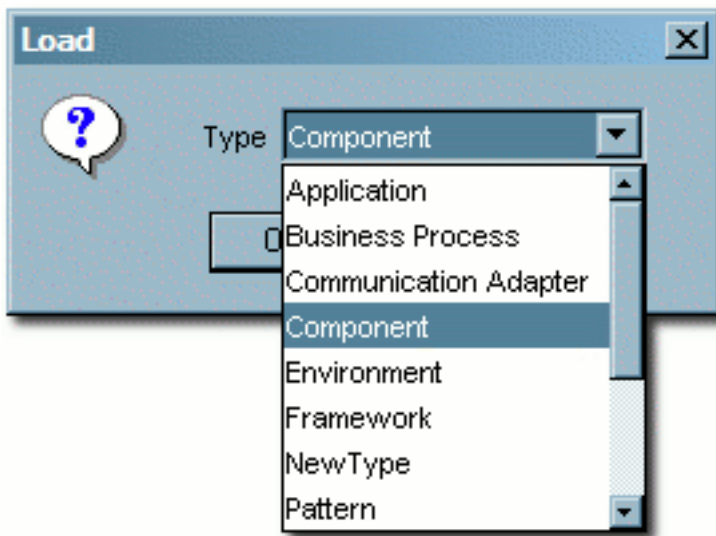
Using the Export Schema feature

This procedure is performed in the **Type Manager**.

1. Select **Export Schema** from the **File** menu.

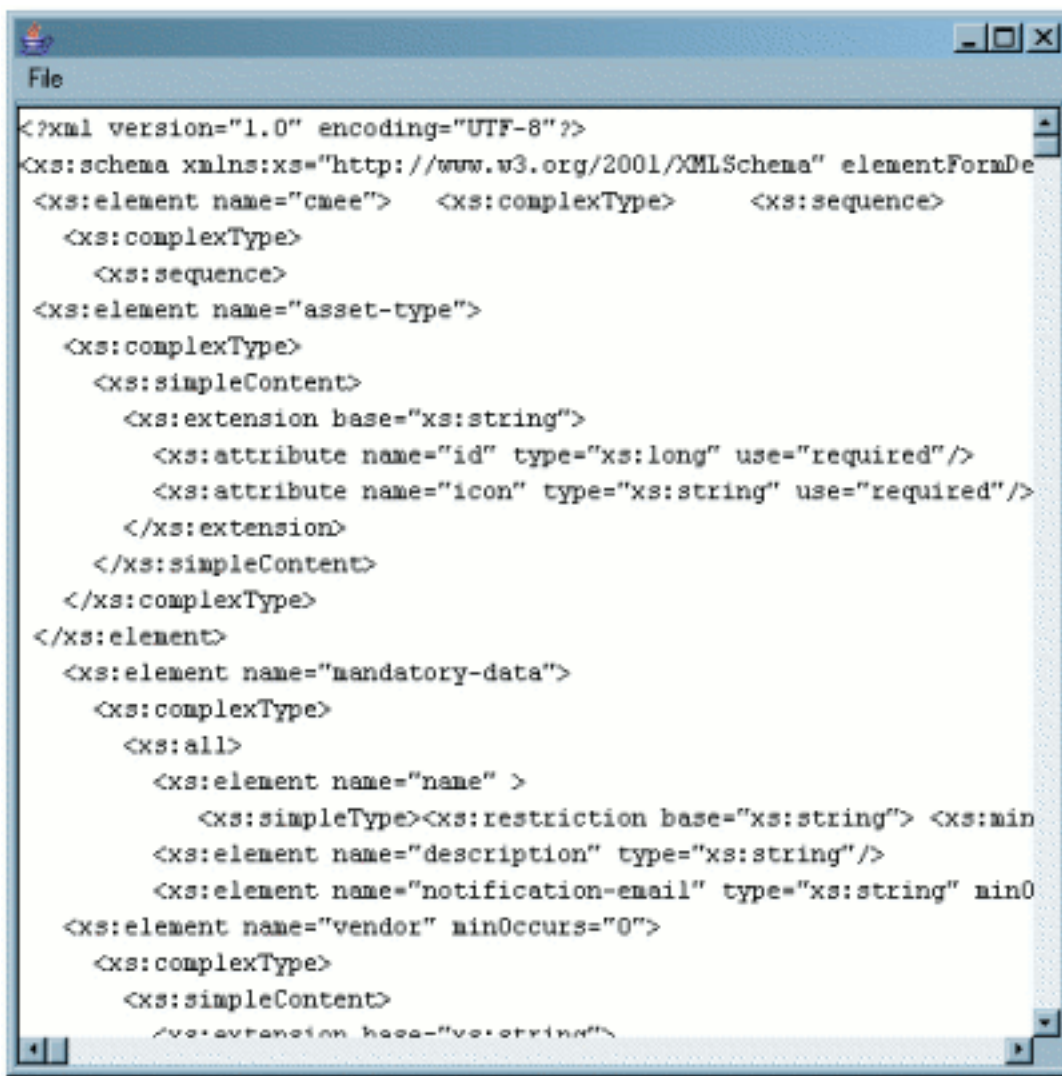


The **Load** pop-up opens.



2. Select a **Type** from the the drop-down.
3. Click **OK**.

The XML schema display opens.



The display window does not allow editing of the schema. However, the schema may be saved to the local file system for later use. (Click **Save** in the window's **File** menu.)

- The schema may also be copied/pasted into a local document to use for validation of Type XML documents.

Using the Type XML Editor

The XML Editor allows unvalidated modifications of the XML source for Asset Types and Compliance Templates.

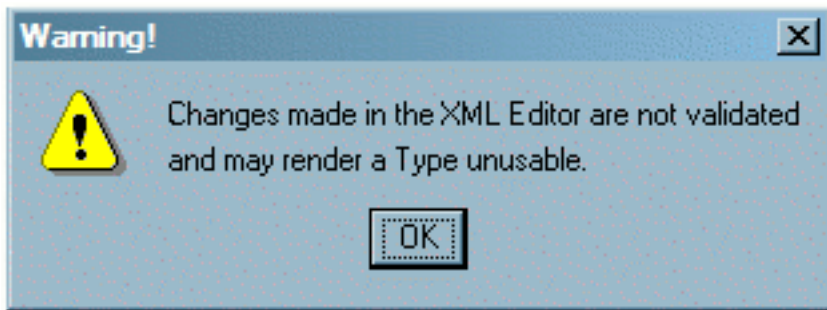
CAUTION

Improper changes to the XML source may render an Asset Type or Compliance Template inoperable.

1. Select **XML Editor** from the **Support** menu in the **Type Manager**.



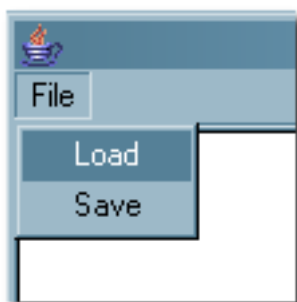
A warning message appears.



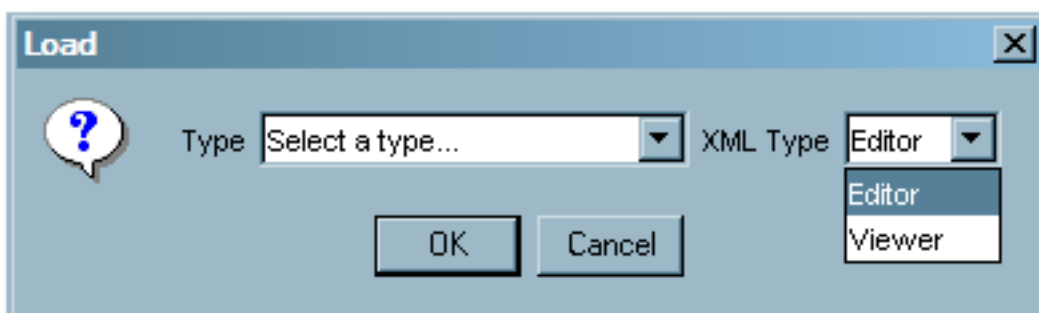
2. Click **OK**.

A blank window opens.

3. Select **Load** from the **File** menu in the blank window.

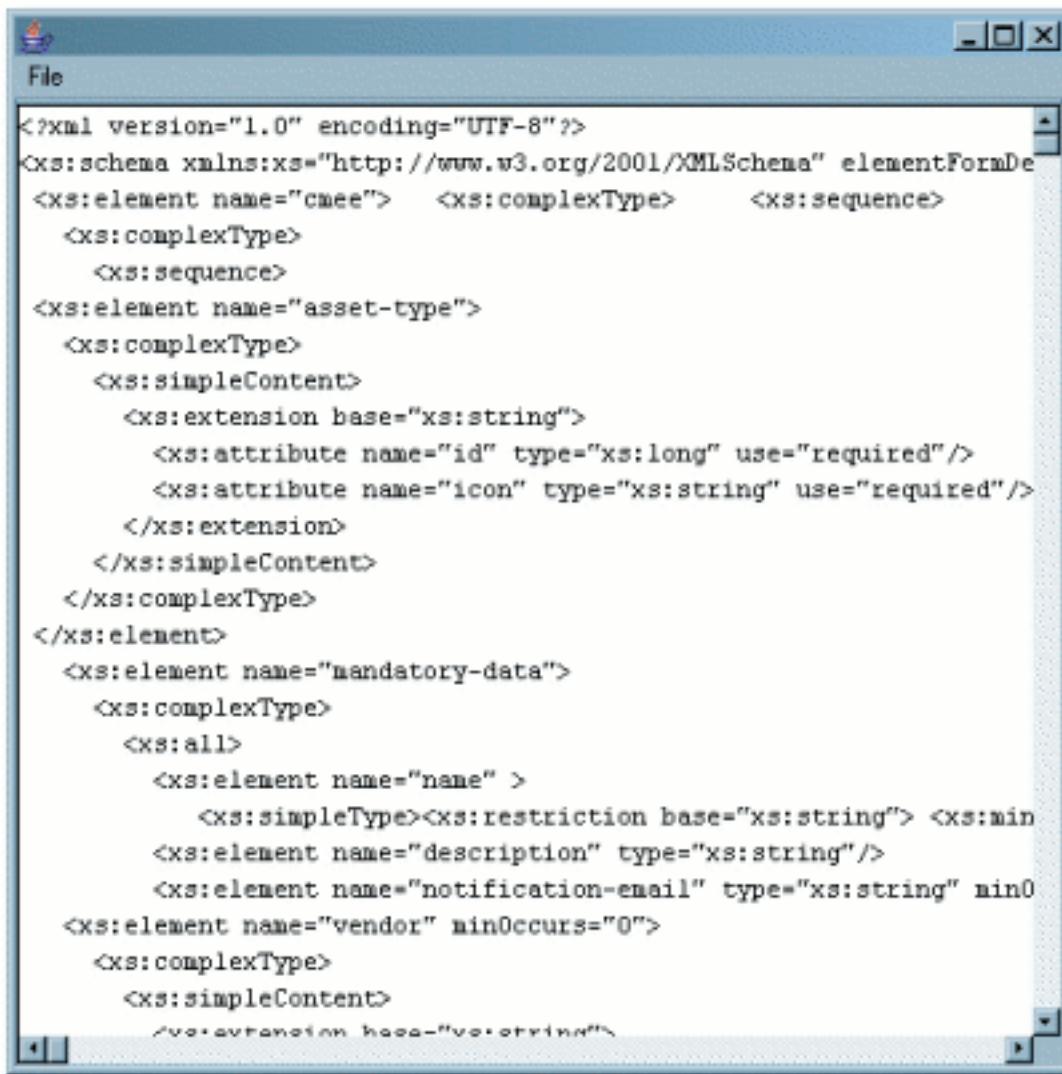


The **Load** pop-up opens.

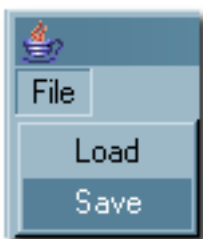


4. Select the **Type** whose schema will be edited from the **Type** drop-down.
5. Select **Editor** or **Viewer** from the **XML Type** drop-down. These selections refer to the **Editor** and **Viewer** tabs in the **Type Manager**.
6. Click **OK**.

The selected schema opens.



7. Edit the schema as necessary.
8. Save the changes.





Unique ID

Overview

Every asset submitted to AquaLogic Enterprise Repository is automatically tagged with an ALER-specific ID number, which is used in the organization and management of assets. However, in certain environments or situations it may be advantageous for an organization to assign an additional custom identification key to specific assets. For example, a **Unique ID** key might be used to enforce uniqueness when relating an asset to a resource or asset in a system external to ALER.

AquaLogic Enterprise Repository's **Unique ID** feature allows users with access to the **Type Manager** to add the **Unique ID** element to selected asset and/or compliance template types. Only one **Unique ID** element may be added per type. This **Unique ID** element then appears in the **Asset Editor** display of assets of the selected types.

Users with access to the **Asset Editor** can assign a **Unique ID** key to these assets/ compliance templates by adding the appropriate information in the **Unique ID** text box.

The uniqueness of each ID key can be enforced across the entire system, or limited to enforcement within a specific type. For example, when enforced across the entire system, no two assets, regardless of type, may be assigned the same **Unique ID** key. When enforced within a type, no two assets of the same type can be assigned the same key. However, the same **Unique ID** may be assigned multiple assets of different types. Within the **Asset Editor**, any attempt to save an asset with a **Unique ID** key that has already been assigned to another asset results in an error message.

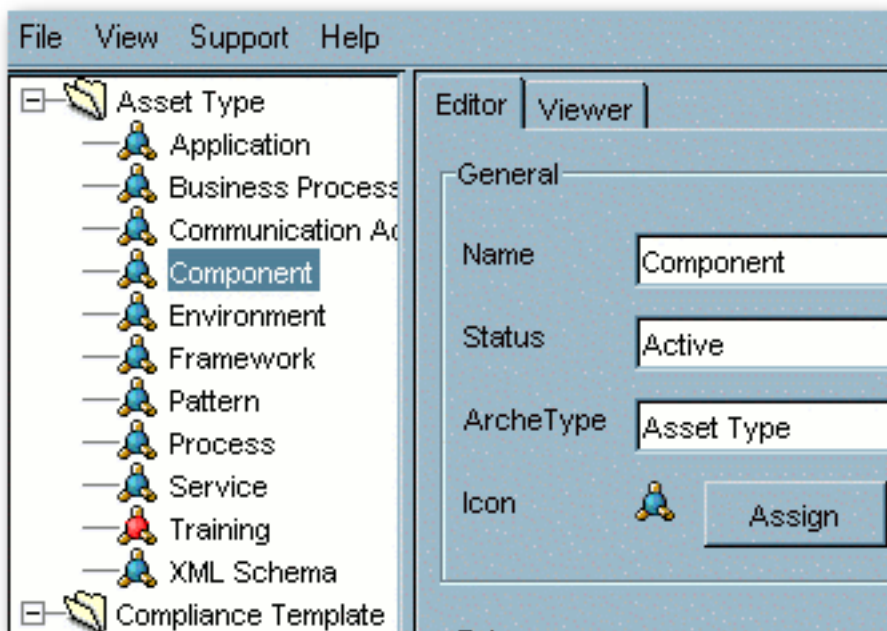
The specific **Type Manager** configuration of the **Unique ID** element determines whether the element and information contained therein is visible to users in the asset detail display for individual assets in AquaLogic Enterprise Repository.

Adding the Unique ID Element to a Type

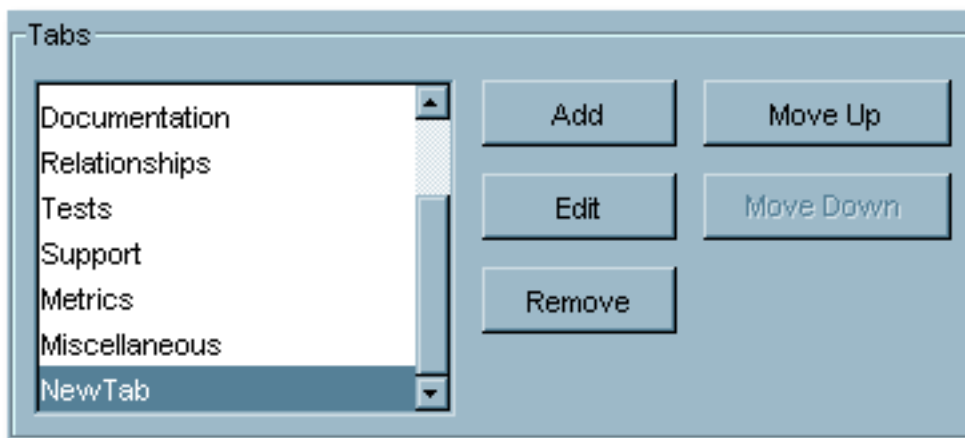
This procedure is performed in the **Type Manager**.

Note: The properties associated with the **Unique ID** element must be enabled in the **System Settings** section of the **Admin** screen. See [Properties](#).

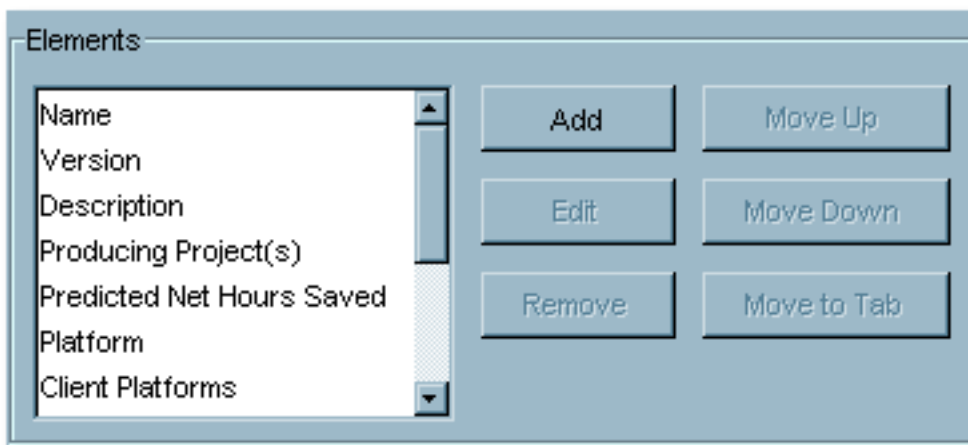
1. Select the Type to be modified.



2. Select the tab to which the **Unique ID** element is to be added.

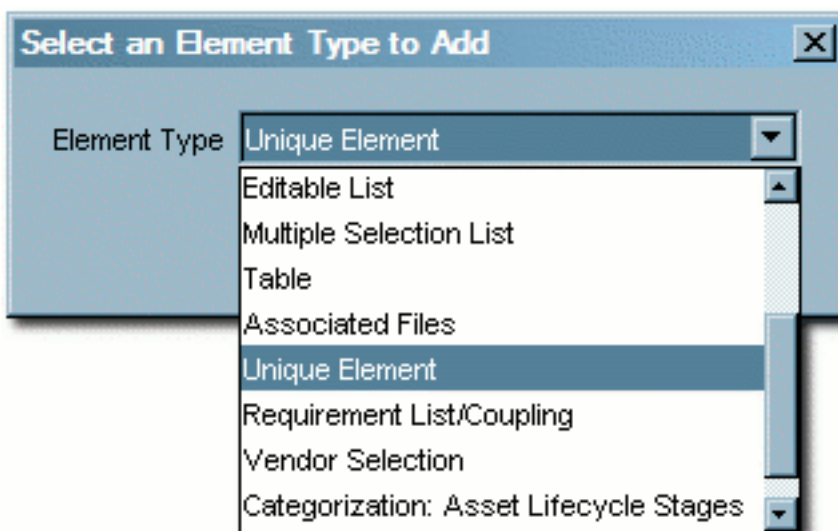


The elements assigned to that tab appear in the **Elements** section.



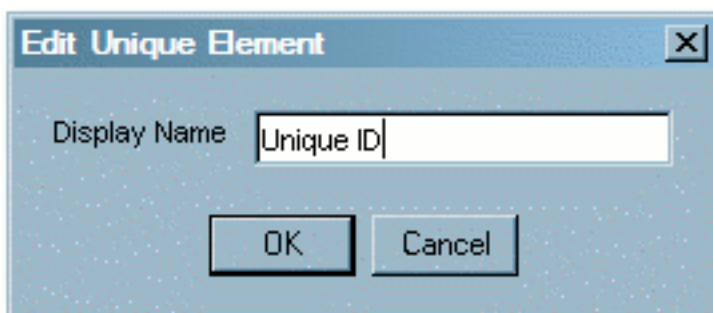
3. Click **Add** in the **Elements** section.

The **Select an Element Type to Add** pop-up opens.



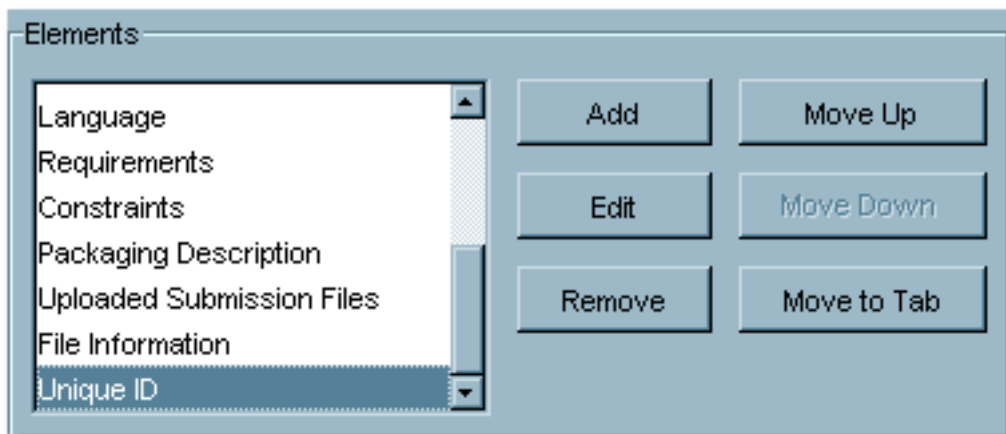
4. Select **Unique Element** from the drop-down.
5. Click **OK**.

The **Edit Unique Element** pop-up appears.

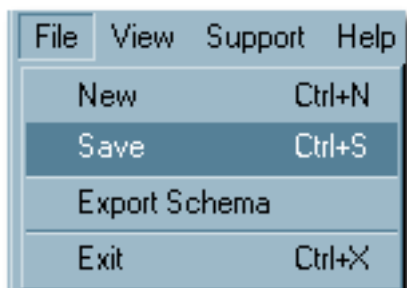


6. Enter the appropriate information in the **Display Name** text box in the **Edit Unique Element** pop-up.
7. Click **OK**.

The **Unique ID** element now appears in the **Elements** list.



8. Save the changes.



Information necessary for custom reporting

Table name:

- UniqueElementValues

Fields:

- assetid: ID of asset (foreign key to assets.id)
- assettypeid: ID of assettype (foreign key to assettypes.id)
- value: Unique value (varchar 4000)

Note: A record will appear in the `uniqueelementvalues` table only if the asset's **Unique ID** element (as it appears in the **Asset Editor**) contains a value.

Properties

Two properties are associated with the unique element:

- `cmee.unique-element.enable`
 - Enable/disable field for uniqueness.
- `cmee.unique-element.per-assettype`
 - True = uniqueness enforced within the asset type
 - False = uniqueness enforced across the entire system.

Note: Repeatedly toggling this property from true to false may result in unexpected system behavior.

Sample Scenarios:

1. `cmee.unique-element.per-assettype` is set to true
 - Uniqueness is enforced within the asset type.
 - Multiple assets of *different* asset types can share the same **Unique ID**.
 - Assets of the same asset type *cannot* share the same **Unique ID**.
2. `cmee.unique-element.per-assettype` is set to false
 - Uniqueness is enforced across the system.
 - No two assets, regardless of asset type, can share the same **Unique ID**.
 - Prior **Unique ID** assignments are unaffected by this property change. However, attempts to save changes to assets may be rejected if the asset shares a **Unique ID**.



Changing the Version Field Name

Modify the Search Results Pane

1. Navigate to the `WEB-INF/config/portletsets` directory.
2. Locate the `cmee_asset.psml` file in the `WEB-INF/config/portletsets` directory.

The file contains the following line: `<field display-name="Version" method-name="getVersion" method-comparator="com.flashline.util.comparator.CaseInsensitiveStringComparator"/>`

3. Replace `Version` in `display-name="Version"` with an appropriate name.

Note: Removing the entire line removes the field display.

Modify the Asset Detail Pane

This procedure is performed in the **Type Manager**.

1. Open the **Type** to be modified.
2. Click the **Editor** tab.
3. Select the **Version** field (appears in the **Overview** section in default Types).
4. Click the **Edit** button.
5. Rename the field.
6. Click **OK**.
7. Save changes to the **Type**.
8. Repeat the process as necessary to modify other Types.