BEA AquaLogic™ Enterprise Repository (Evaluation Version)

User Guide

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Getting Started

Logging in to AquaLogic Enterprise Repository

1. Open a browser and type in or access the URL for AquaLogic Enterprise Repository.

2. On the login screen, enter the appropriate information in the **Username** and **Password** boxes.

Note: If your organization requires username/password each time you log in to AquaLogic Enterprise Repository, make sure that the **Enable Automatic Login** box is unchecked.

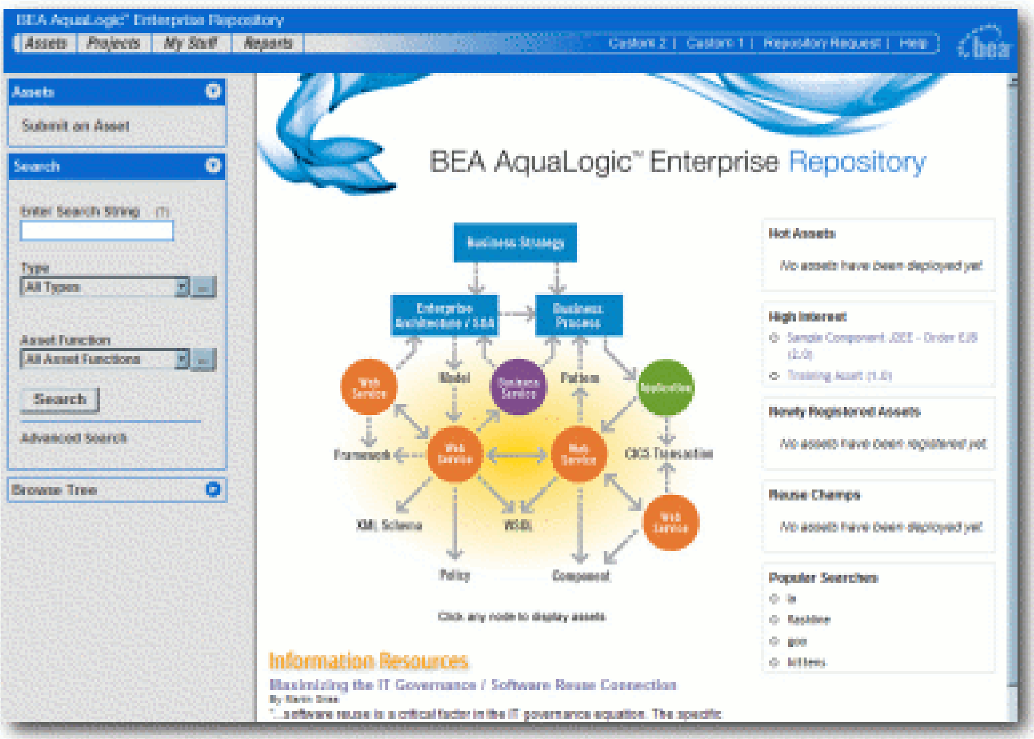
3. Click **Login**.

Result: The **Login Stats** dialog box displays a welcome message that includes the date and time of your login.

4. In the **Login Stats** dialog box, click **Close**.

The Default View

The AquaLogic Enterprise Repository home page is displayed on login. This page can be customized by the system administrator to display resources, assets, and news relevant to your company.



Each screen in AquaLogic Enterprise Repository is divided into a sidebar and a main pane. The main pane can be expanded by dragging the left border of the pane to the left.

The AquaLogic Enterprise Repository Menu Bar

The **AquaLogic Enterprise Repository Menu Bar** runs across the top of the screen, and allows you to navigate to the various tools and features within AquaLogic Enterprise Repository.

The actual links that appear in the menu bar are determined by the permissions granted to your specific role. These links point to corresponding AquaLogic Enterprise Repository screens, each with specific features and functionality:

- **Assets**
  - Click to use, submit, edit, and manage assets, as determined by the access

settings for your assigned role.

- **Projects**
    - Visible/accessible only to users in the appropriate role.
    - Click to create, manage, and search for projects, and to assign users to projects.

- **My Stuff**
    - Click to view information about assets you have produced or consumed; projects to which you are assigned; or assets to which you have subscribed.

- **Reports**
    - Click to view a number of standard reports based on asset usage, value, and compliance.

- **Admin**
    - Visible/accessible only to users in the appropriate role.
    - Enables system configuration after installation, and is used to create users, assign roles, configure access settings, configure system and email settings, and monitor system use.

- **Resources**
    - Optional/customizable
    - Enabled/disabled in **Admin**
    - Can be configured to direct users to additional information.

- **Marketplace**
    - Optional/customizable
    - Enabled/disabled in **Admin**
    - Can be configured to link to an internal or external site where assets can be acquired.

- **Repository Request**
    - Click to submit requests to the designated registrar, such as a request for an asset that is unavailable in the registry.

- **Help**
    - Provides general information on using AquaLogic Enterprise Repository.

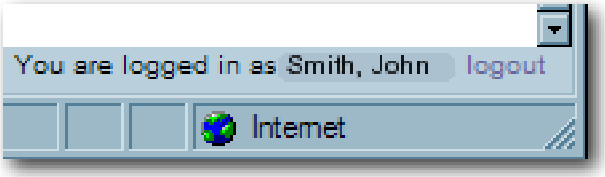
The lower portion of the main window can be customized to highlight your company's news and policies. This page includes embedded features that display information about new additions to the registry, the most frequently used assets, and a list of users who have achieved the highest levels of asset reuse. As an alternative, your company can substitute its own home page. Think of this page as a configurable portal that allows your organization to promote initiatives to all AquaLogic Enterprise Repository users.

Logging out of AquaLogic Enterprise Repository

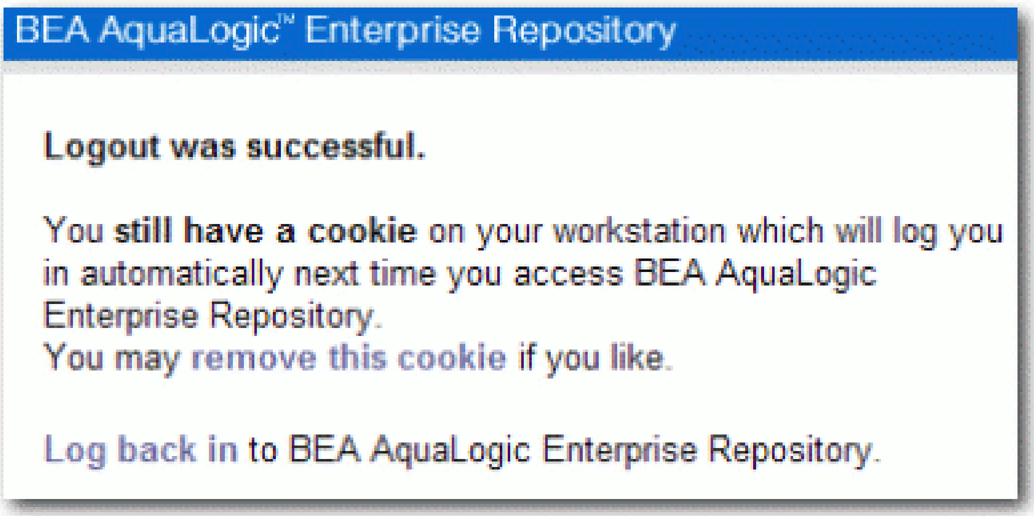
The login indicator, located in the bottom right corner of any AquaLogic Enterprise Repository screen, indicates the username under which you are currently logged in. A logout link is also provided.

To login:

1. Click **logout**.



A confirmation message appears.



2. Exit the browser, or click **Log back in**.

User Roles

User Role Descriptions

AquaLogic Enterprise Repository users are defined by roles. Each role has certain permissions that enable users to fulfill specific tasks.

The default roles shipped with AquaLogic Enterprise Repository are described below. (The **Admin** screen, visible only to users with the appropriate access settings, allows the names of these roles to be changed to suit organizational needs. The **Admin** screen also provides the means to change **Access Settings**.

- **User**
  - Anyone with a AquaLogic Enterprise Repository user name and password is considered to be a user. This role can be assigned as the default role for any new users at the time the user is created. All AquaLogic Enterprise Repository users can:
    - View news about the company's reuse initiatives
    - Locate, evaluate, and use/download assets
    - View projects that are associated with assets
    - Generate reports
    - Submit assets to the registrar

- **Access Administrator**
  - The access administrator creates all AquaLogic Enterprise Repository users and assigns permissions to them. The access administrator must be familiar with the functions of the **Admin** tab. Typically, access administrators can:
    - Create, view, and edit users and permissions
    - Generate reports

- **Advanced Submitter**
  - The advanced submitter role is typically assigned to *asset builders* and *harvesters*.
    - *Asset Builders* focus on building the asset content base. They respond to

organization-wide asset needs as well as individual project needs.
    - *Harvesters* study post-implementation projects for asset reuse potential.

- Typically, advanced submitters can:
    - Locate, evaluate, and use/download assets
    - View projects that are associated with assets
    - Generate reports
    - Submit assets to the registrar
    - Edit asset metadata prior to asset registration

- **Registrar**
  - The registrar is the single point of acceptance or rejection for any asset. There may be more than one person functioning as a repository registrar, depending on the functions addressed. Typically, registrars can:
    - Locate, evaluate, and use/download assets
    - View projects that are associated with assets
    - Generate reports
    - Submit assets to the registrar
    - Edit asset metadata prior to asset registration
    - Accept assets for the registration process
    - Approve tabs
    - Register assets
    - Edit access settings

- **Registrar Administrator**
  - The registrar administrator is able to establish asset types and compliance templates within AquaLogic Enterprise Repository, using the Type Manager. Typically, registrar administrators can:
    - Locate, evaluate, and use/download assets
    - View projects that are associated with assets
    - Generate reports
    - Submit assets to the registrar
    - Edit asset metadata prior to asset registration
    - Accept assets for the registration process
    - Approve tabs
    - Register assets
    - Edit access settings
    - Edit repository hosts and asset types/compliance templates

- **Project Administrator**
  - AquaLogic Enterprise Repository tracks asset use at the project level in order to maintain a history for maintenance purposes. Project administrators create projects and assign users to projects using the **Projects** tab , visible only to

users with appropriate permissions. Project administrators can also close projects, indicate which assets were deployed, and review, validate, and optionally override the predicted, consumer-reported value of assets used in a project through the project-reported asset value user interface. Typically, project administrators can:
    - Create, edit, and view projects
    - Generate reports

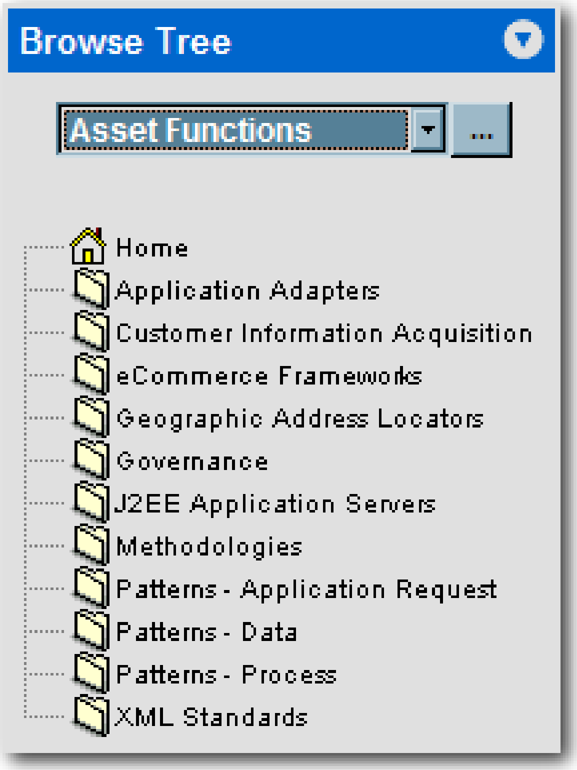
- **System Administrator**
  - The system administrator configures AquaLogic Enterprise Repository for use, including, possibly, installation as well as the post-installation configurations. The system administrator typically can:
    - Enable and edit system settings
    - Generate reports

Navigating the Asset Tree

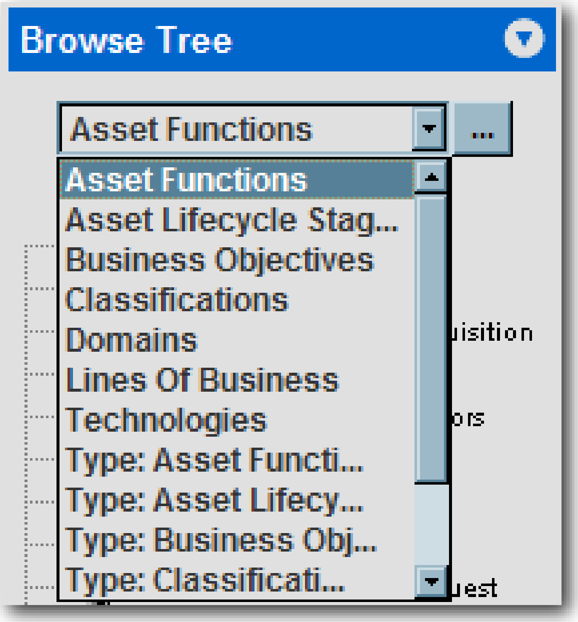
This procedure is performed on the AquaLogic Enterprise Repository **Assets** screen.

1. Click **Browse Tree** in the sidebar.

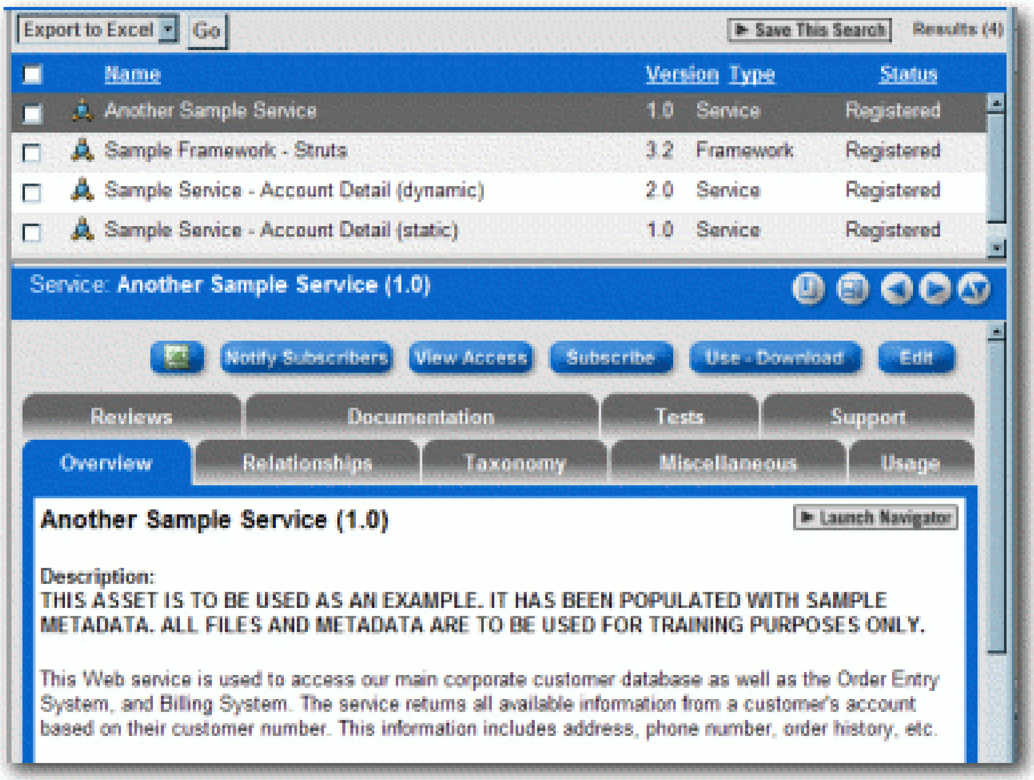
   The tree opens.



2. Use the drop-down to filter the results.



3. Click any folder in the tree to display its contents in the main pane.

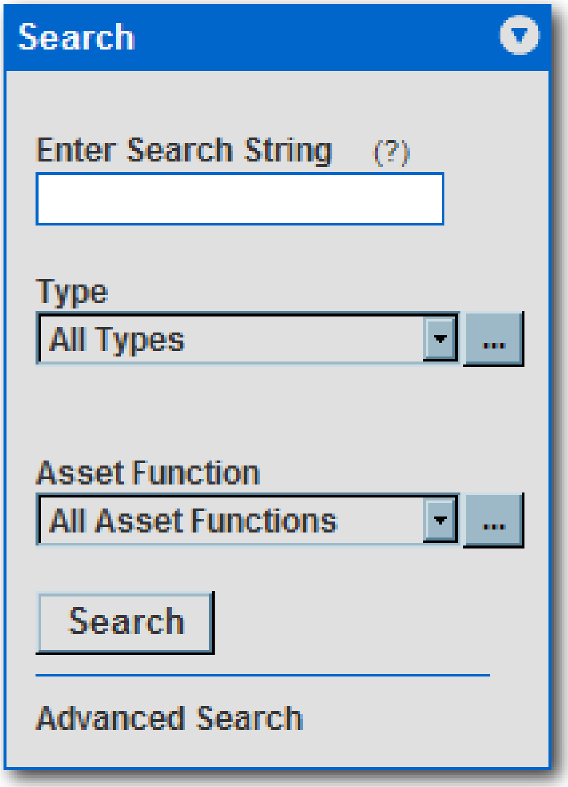


The detail of the first item in the results list automatically opens in the lower frame.

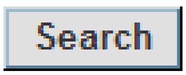
Standard Searches

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

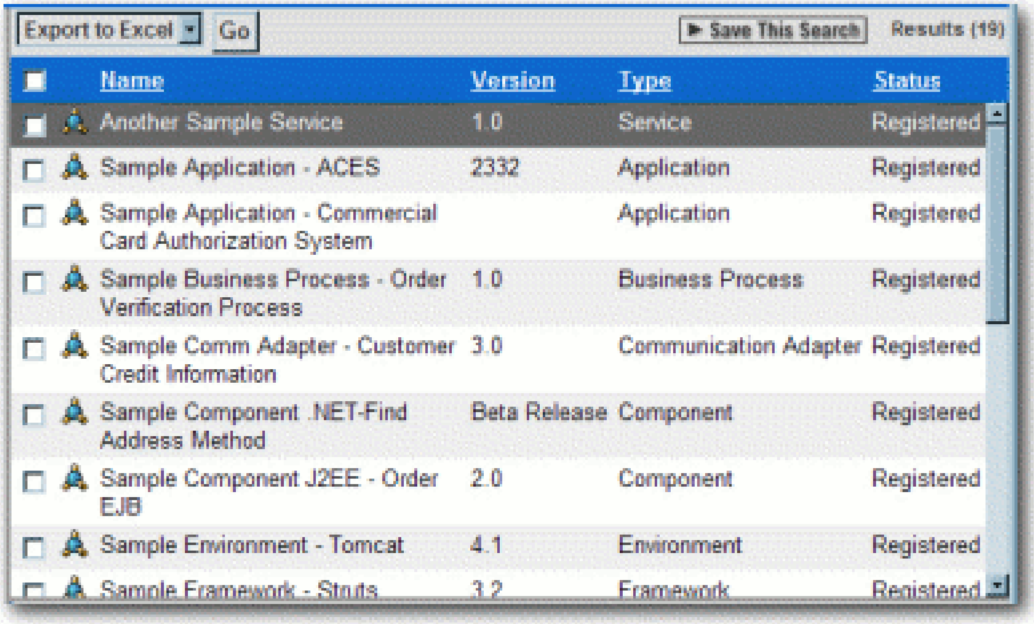
1. Enter a search term in the **Keyword** text box.



2. Use the **Type** and **Asset Function** drop-downs to refine the search.

3. Click 

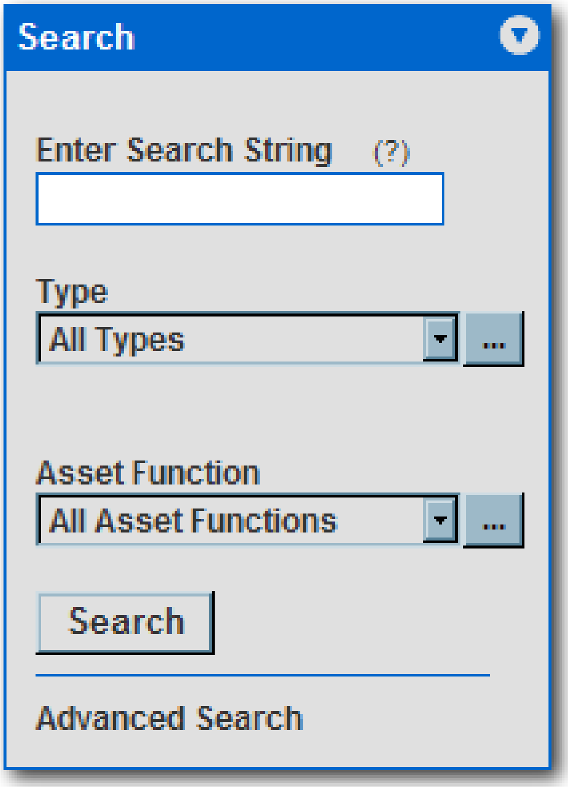
   Search results are listed in the main pane.



4. If necessary, **save the search**.

Searching a Specific Field

The procedure is performed in the **Search** section of the AquaLogic Enterprise Repository **Assets** screen by entering the appropriate search terms in the text box.



- Use the following syntax to perform a search on *myAsset* in the **name** field only:

  name:myAsset .

- Use the following syntax to perform a search on *myAsset* in the **description** field only:

  description:myAsset or *desc:myAsset*

- The prefix *wsdl:* will limit the search to the WSDL binding, port type, or port name.
  - Example: *wsdl:myService*

Search results appear in the upper section of the main pane.

Advanced Search

Overview

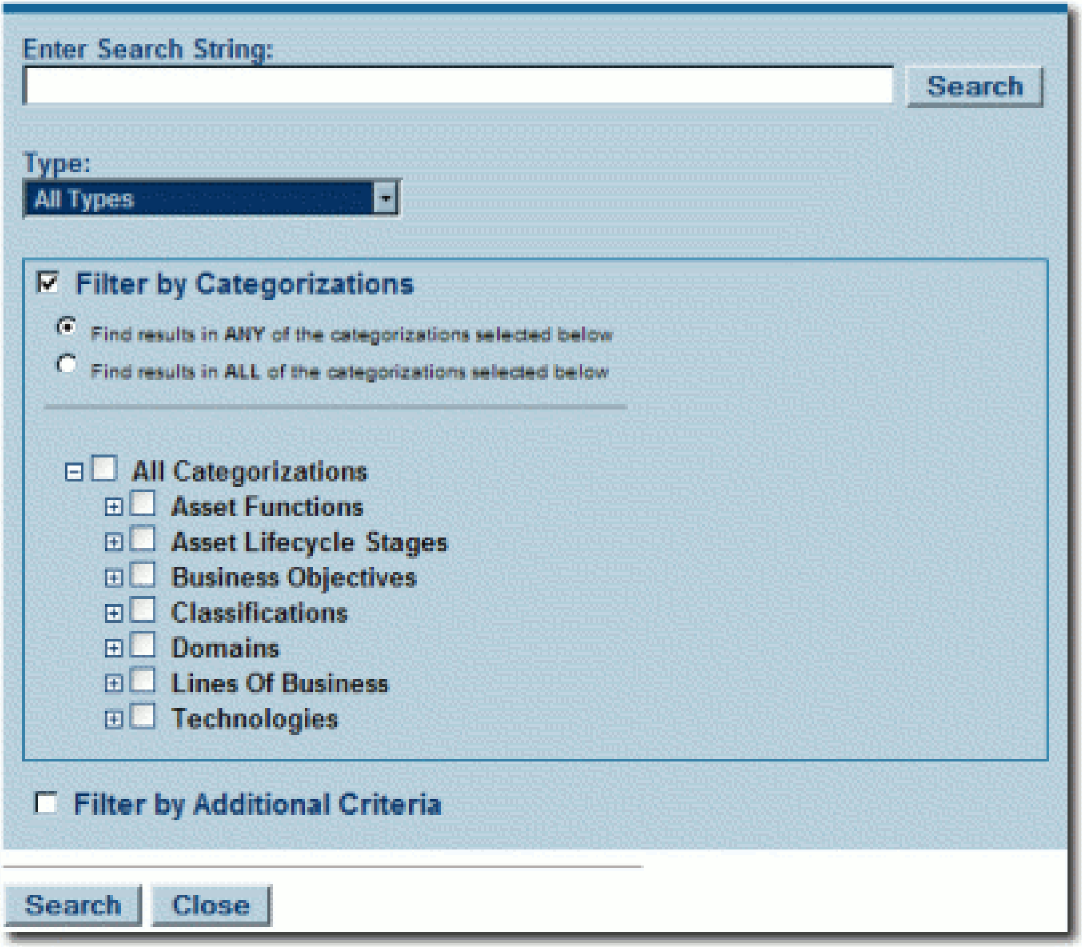
Using **Advanced Search** involves a cascading series of selections and features to create a refined set of search parameters. Selections made at each step in the process will determine the specific features and functions displayed in the **Advanced Search** pop-up.

Performing an Advanced Search

This procdeure begins on the AquaLogic Enterprise Repository **Assets** screen.

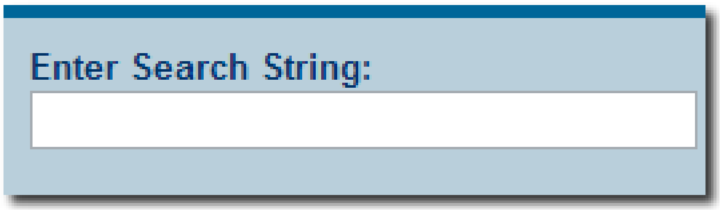
1. Click **Advanced Search**.

   The **Advanced Search** pop-up opens.



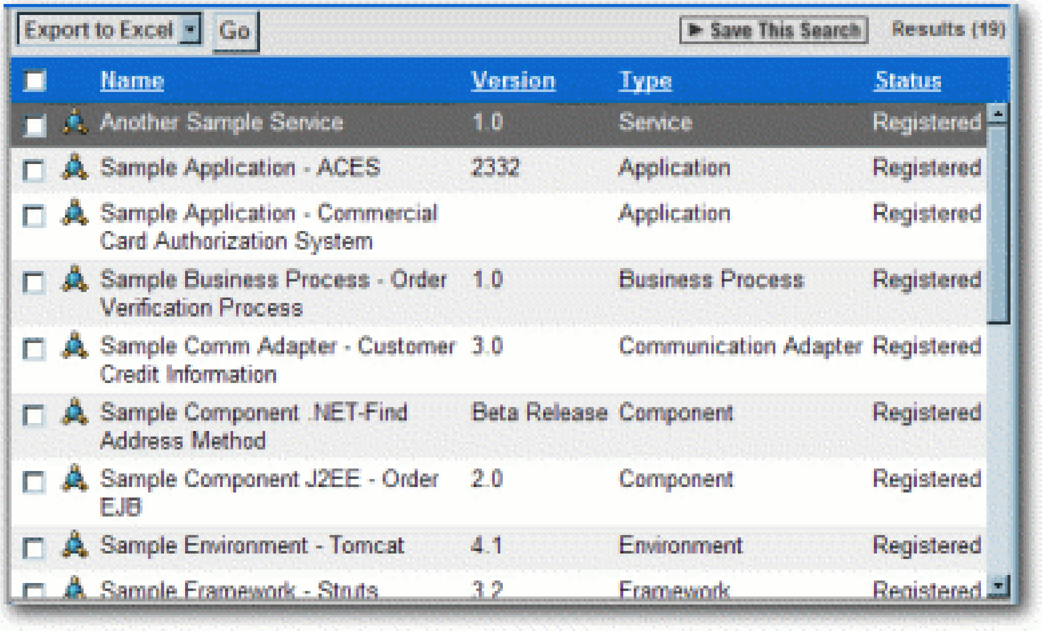
Note that the **Filter by Categorizations** option is selected by default, as is the **Find results in ANY of the categorizations selected below** radio button. (The actual list of categorizations is determined by the specific configuration of AquaLogic Enterprise Repository.)

2. Enter an appropriate search string in the **Enter Search String** text box.



3. Click the **Search** button at this point to run the search without further refinement.

   Search results are listed in the upper frame of the main pane of the **Assets** screen.



The **Advanced Search** pop-up remains open to allow search refinement.

Filtering an Advanced Search by Type and/or Registration Status

This procedure is performed in the **Advanced Search** pop-up.

Note: Registration Status is available as a search filtering option only if the AquaLogic Enterprise Repository **Assets in Progress** option is activated.

1. Select an appropriate type from the **Type** drop-down.

2. As necessary, select the appropriate registration status from the **Registration Status** drop-down.

3. Click the **Search** button at this point to run the search without further filtering.

   Search results are listed in the upper frame of the main pane of the **Assets** screen.

   The **Advanced Search** pop-up remains open to allow search refinement.

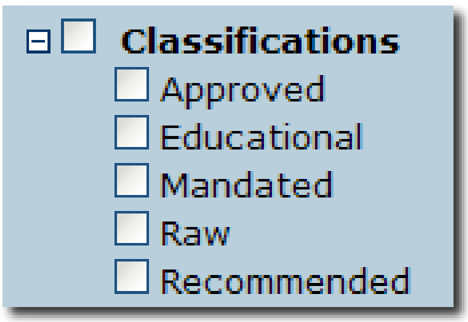
Filtering an Advanced Search by Categorizations

This procedure is performed in the **Advanced Search** pop-up.

1. Select the appropriate radio button in the **Filter by Categorizations** section to locate the search string in **Any** or **All** of the selected **Categorizations**.

2. Select the appropriate checkbox to determine the categorizations to be searched.

3. Click the **+** icon next to any categorization to expand the sub-categorization tree to further refine the seach.



4. Click the **Search** button at this point to run the search without further filtering.

   Search results are listed in the upper frame of the main pane of the **Assets** screen.

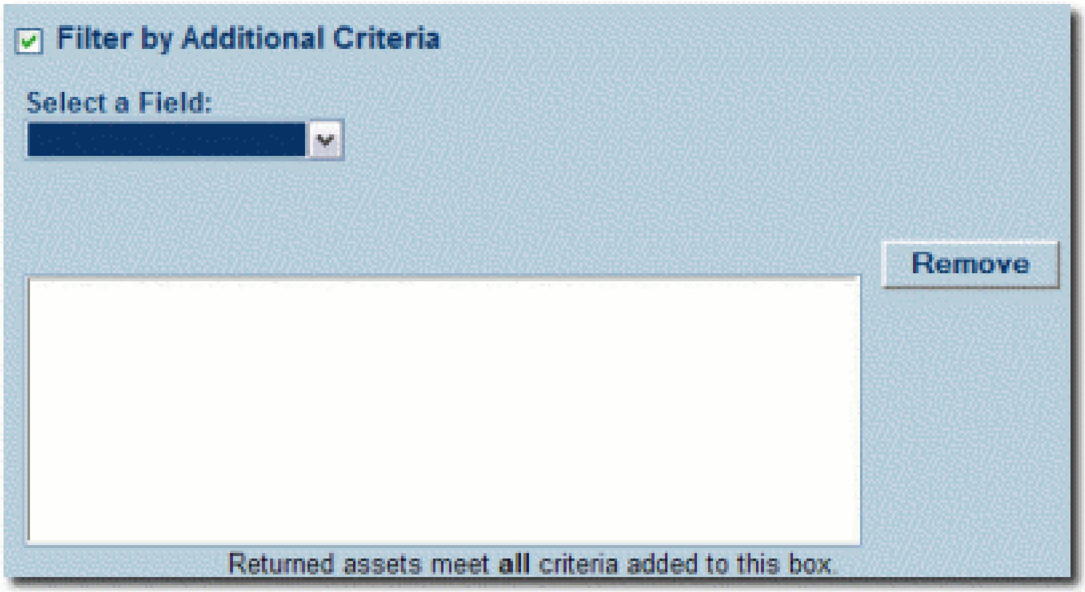
The **Advanced Search** pop-up remains open to allow search refinement.

Filtering an Advanced Search by Additional Criteria

This procedure is performed in the **Advanced Search** pop-up.

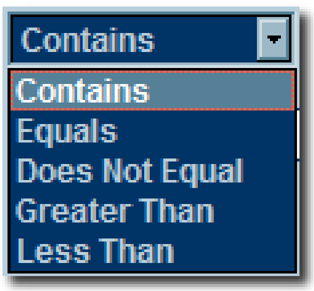
1. Select the **Filter by Additional Criteria** checkbox.

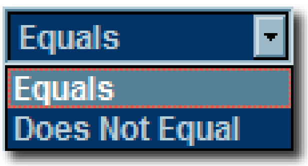
   The **Filter by Additional Criteria** section opens.



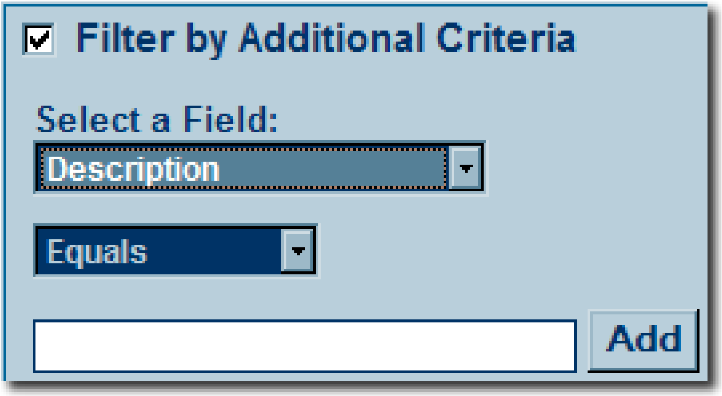
   Note that the available options in the **Select a Field** drop-down are determined by the selections made in **Filtering an Advanced Search by Type and/or Registration Status**, above.

2. Select one of the options listed in the **Select a Field** drop-down. This action will determine the visibility and contents of subsequent drop-down menus in the **Filter by Additional Criteria** section:





3. Select the appropriate additional parameter from the available drop-downs. This selection will determine whether an additional drop-down menu or a text box appears to the left of the **Add** button. (The example below shows the text box.)



4. As necessary, enter text in the text box, or select an item from the drop down.

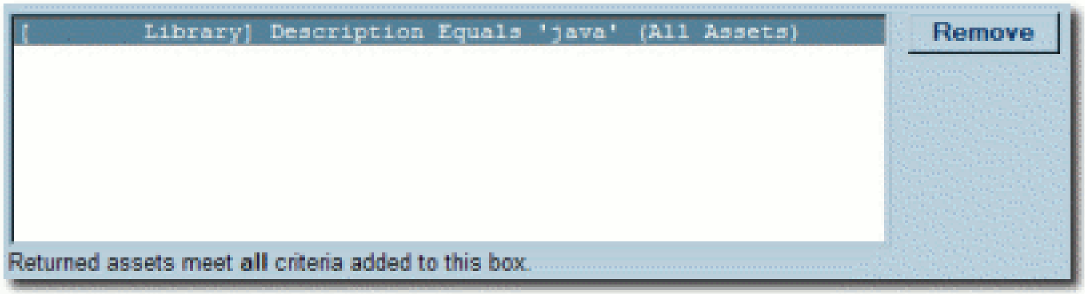
5. Click the **Add** button.

   The search parameter appears in the large text box.

6. Add addtional parameters as necessary.

7. To remove a parameter:

   - Select (single-click) the parameter.
   - Click the **Remove** button.



8. When the all search parameters have been added, click the **Search** button.

   Search results appear in the upper frame of the main pane of the **Assets** screen. The **Advanced Search** pop-up remains open in the background.

   - **Note:**

- Search criteria remain intact as long as the **Advanced Search** pop-up remains open, even when navigating to other areas in AquaLogic Enterprise Repository.

- Click the **Advanced Search** link in the sidebar in the **Assets** screen at any time to move the open **Advanced Search** pop-up to the foreground, with no change to the criteria established in the current search session.

- Click the **Search** button in the **Advanced Search** pop-up at any time to refresh the search results and move the search results display to the foreground.

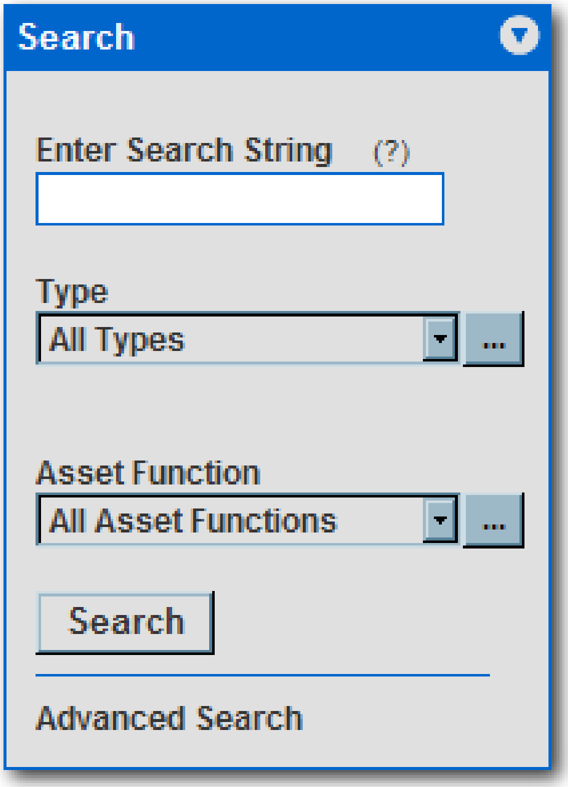
9. If necessary, **save the search**.

Saving Searches

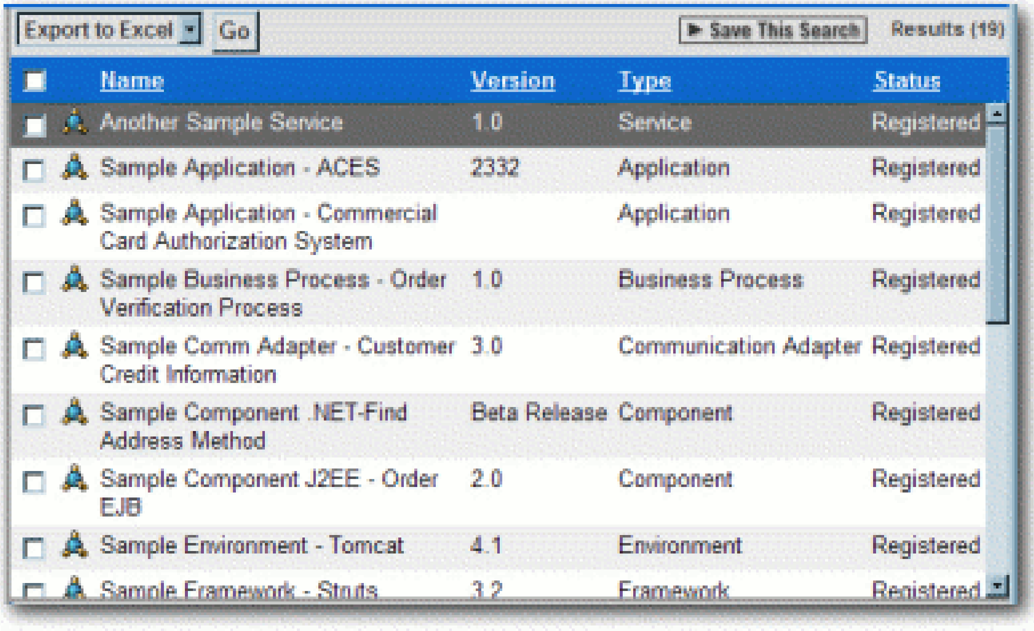
This procedure is performed on the BEA AquaLogic Enterprise Repository **Assets** screen.

(The **Saved Searches** feature must be activated before searches can be saved. See the *BEA AquaLogic Enterprise Repository Administration Guide* for more information.)

1. Perform a standard or **Advanced Search**.

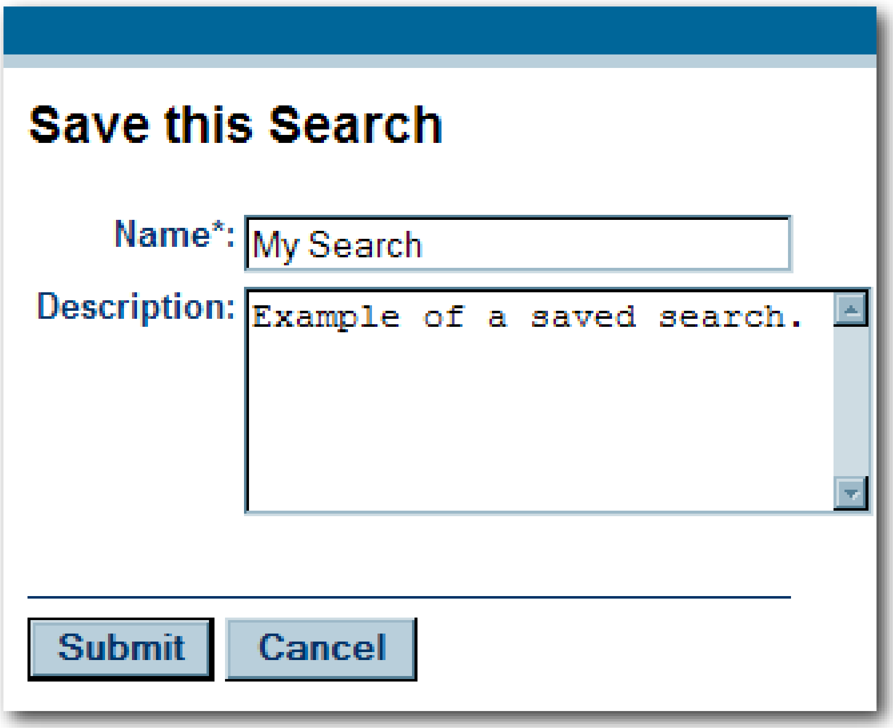


Search results appear in the upper frame of the main pane.



2. Click the **Save This Search** button (upper right, above the search results).

The **Save this Search** pop-up opens.



3. Enter the appropriate information in the **Name** and **Description** text boxes.

4. Click the **Submit** button.

The saved search now appears in the **Saved Searches** drop-down.

Saved searches are also listed in the **Saved Searches** section on the **My Stuff** screen.

Executing a Saved Search

From the BEA AquaLogic Enterprise Repository Assets screen.

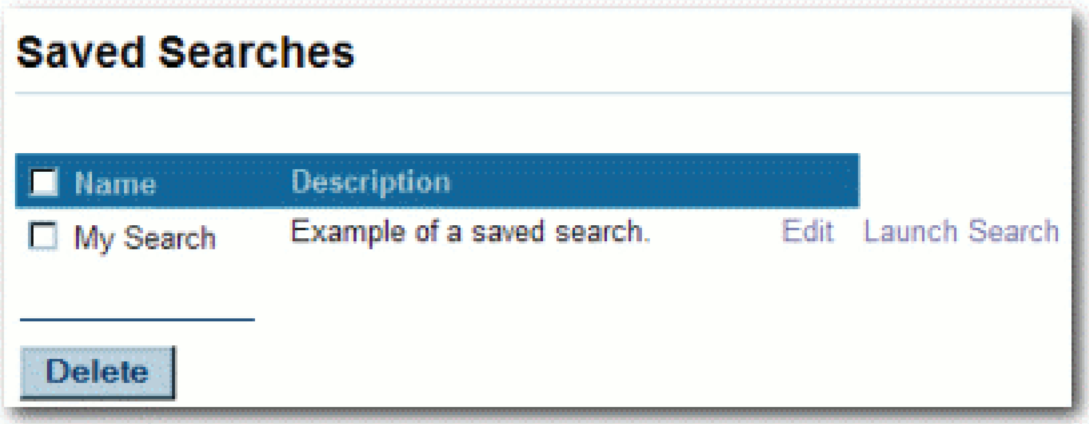
1. Select the search to be executed from the **Saved Searches** drop-down.

2. Click the **Search** button.

   Search results are listed in the upper frame of the main pane.

Managing Saved Searches

These procedures are performed in the **Saved Searches** section on the BEA AquaLogic Enterprise Repository **My Stuff** screen.



Executing a Saved Search

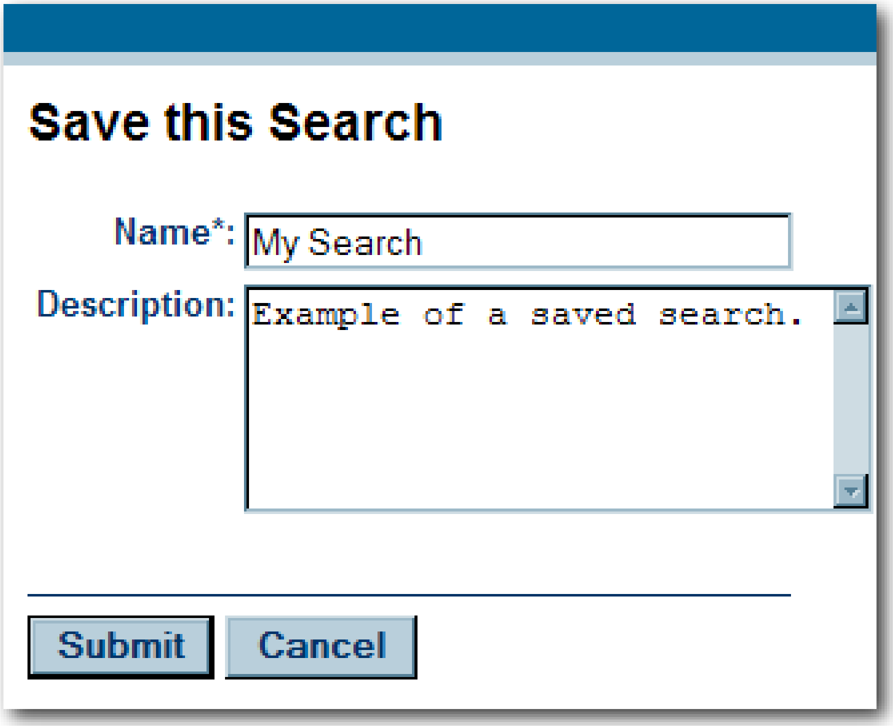
1. Click the text link for the search to be executed.

   Search results appear in the upper frame of the main pane on the **Assets** screen.

Editing a Saved Search

1. Click the **Edit** button next to the saved search.

   The **Save this Search** pop-up opens



2. Make changes as appropriate to the text in the **Name** and **Description** fields. (Search parameters cannot be edited.)

3. Click the **Save** button.

Deleting a Saved Search.

1. Select the checkbox for the search to be deleted. (Select the **Name** checkbox to select ALL saved searches.)

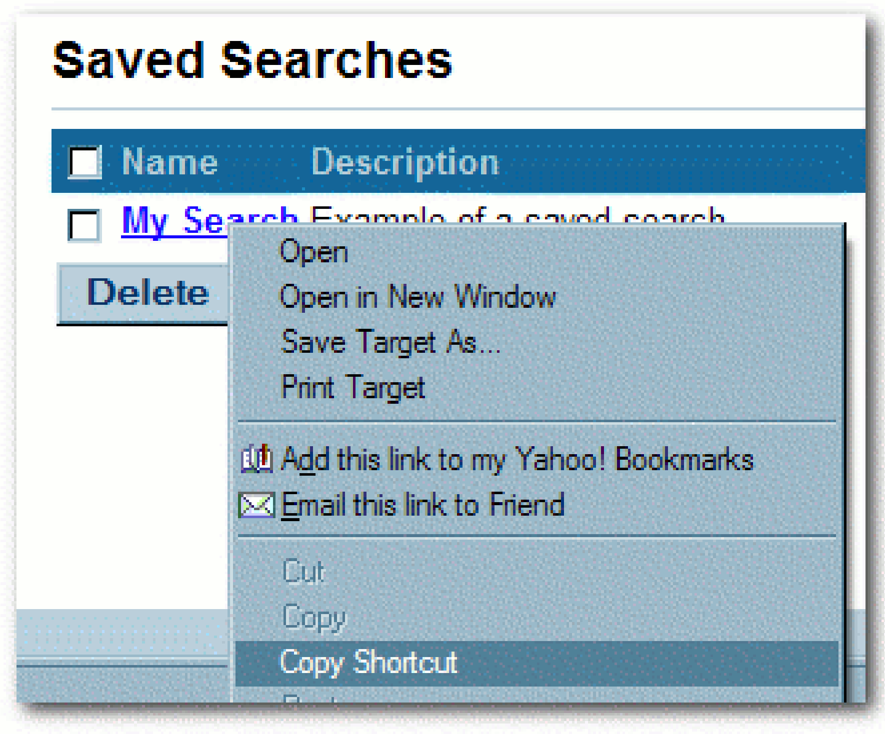
2. Click the **Delete** button.

   The selected search is deleted.

Linking to a Saved Search

1. Right-click over the text link for the selected asset.

   The browser right-click menu opens. (This example uses Internet Explorer.)



2. Select the appropriate function to copy the link information.

3. Use the copied link information to create a direct link to the saved search. The correct syntax is: `http://servername/appname/index.jsp?savedsearchid=SEARCHID`, where `SEARCHID` is the ID number of the saved search.

Factors Affecting Search Results

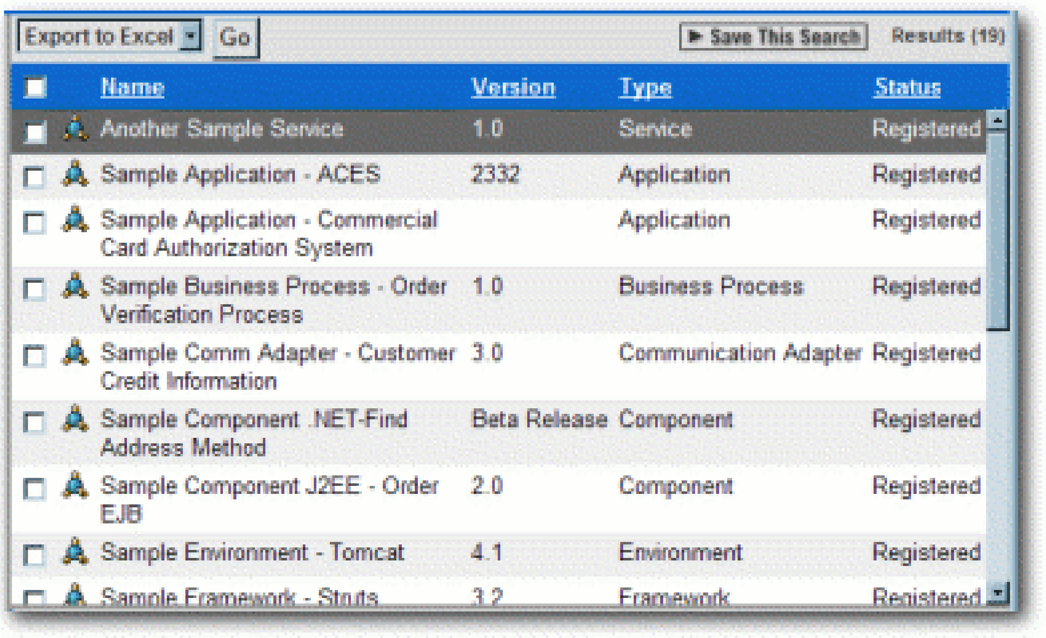
- Search results may change over time as asset are added to/removed from BEA AquaLogic Enterprise Repository.
- Individual search results are subject to user permission settings.
- Activation of the BEA AquaLogic Enterprise Repository **Assets in Progress** feature may affect the results of existing **Saved Searches**.

Print Search Results

(This feature works only in the Internet Explorer browser.)

1. Perform a search.

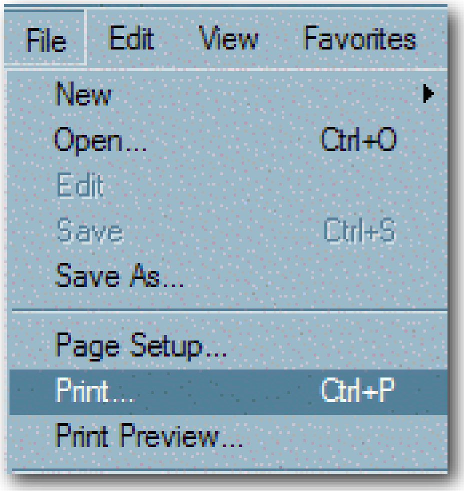
   The search results list appears in the upper frame of the main pane.



2. Click anywhere in the list pane to select the browser frame.

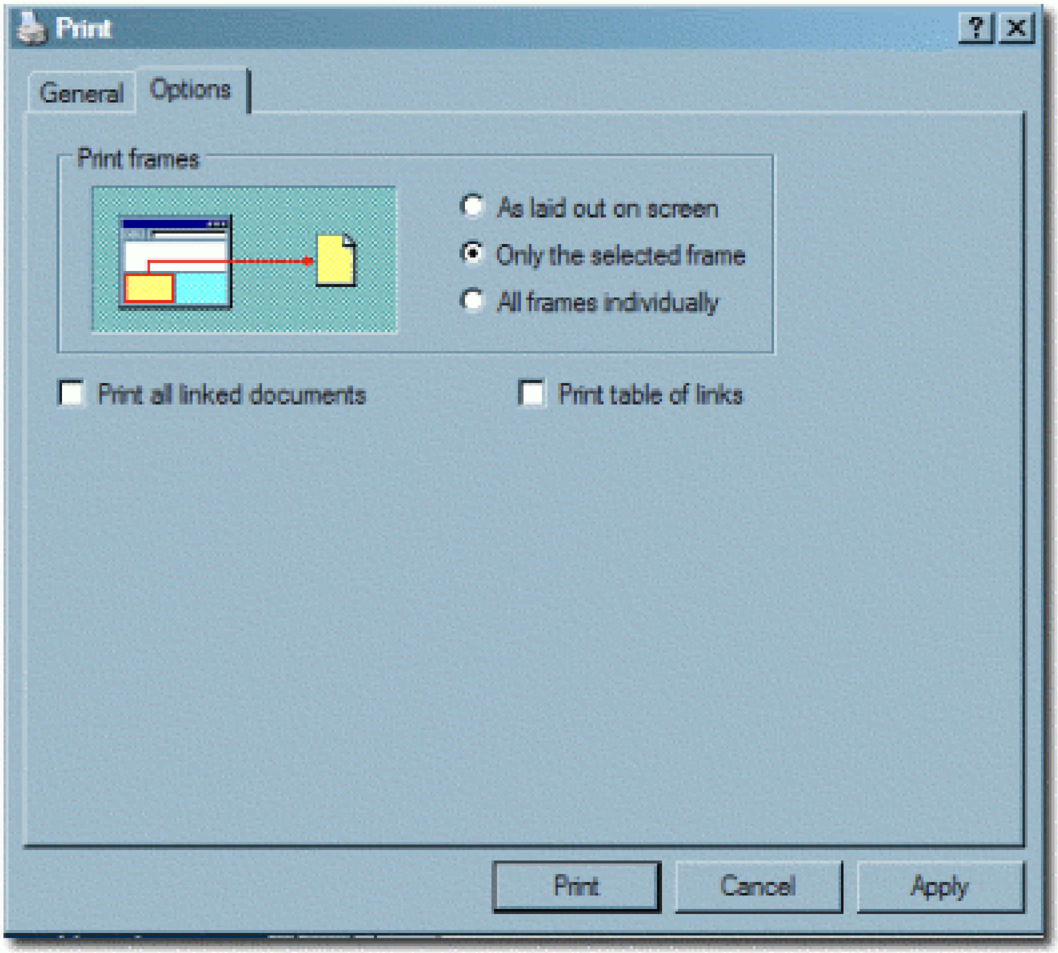
3. **Option 1**

   1. Click **Print** in the browser **File** menu.



The **Print** pop-up opens.

2. Click the **Options** tab in the **Print** pop-up.



3. Select the **Only the selected frame** radio button.

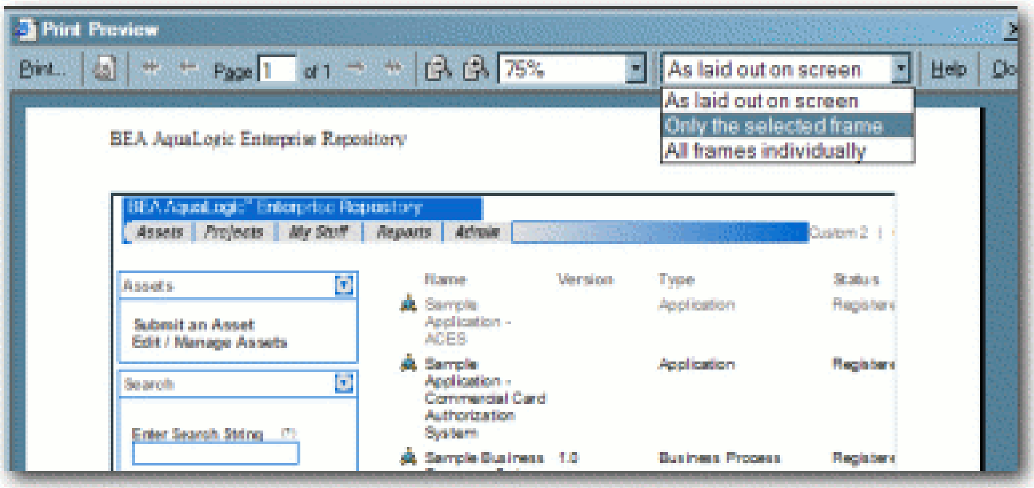
4. Click the **Print** button.

The document is sent to the printer.

4. **Option 2**

   1. Click **Print Preview** in the browser **File** menu.

      The **Print Preview** window opens.

   2. Select **Only the selected frame** in the drop-down.

   3. Click the **Print** button.

      The document is sent to the printer.

EasyLinks

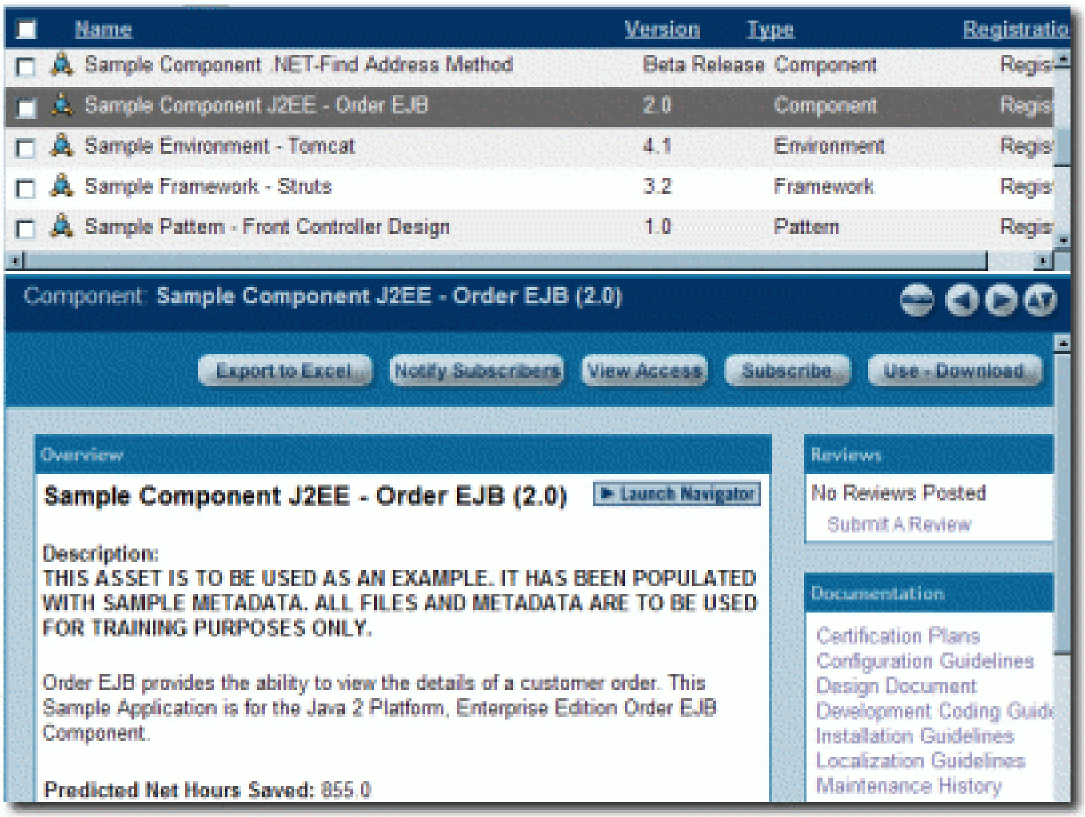
The EasyLink icon is displayed on assets and saved searches. These icons are standard html image links that can copied to the clipboard and pasted into documents or email messages as pointers to specific registry artifacts. EasyLinks can also be dragged and dropped onto the desktop.

- Click  to display the asset detail.
- Drag  onto your desktop or into an email or other document to set a link to an asset.

Evaluating Assets

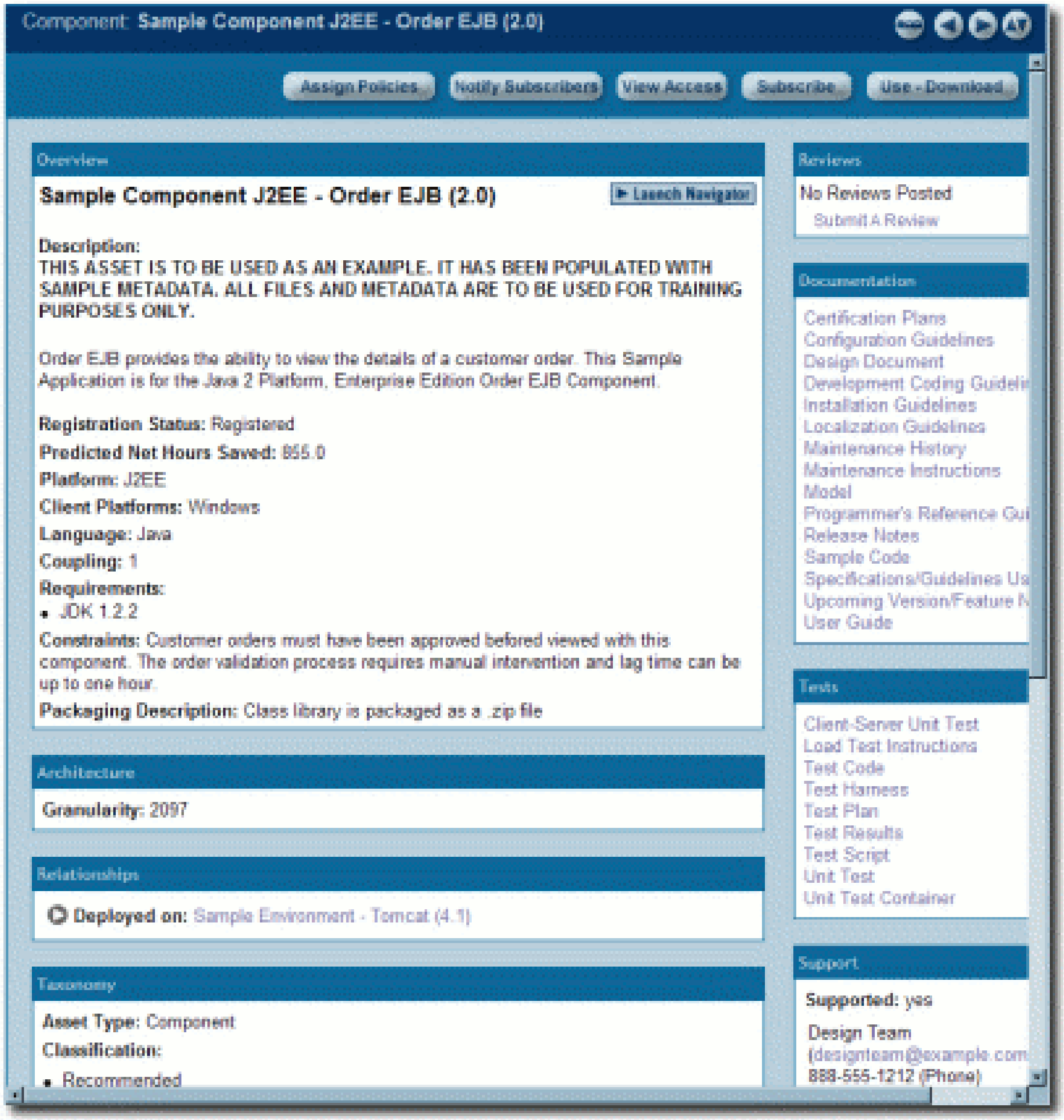
The **Asset Detail** provides a wide variety of information on the use, functionality, and history of an asset. Typically, asset metadata is provided by the asset producer and reviewed by the system administrators or registrars before presentation via AquaLogic Enterprise Repository. Information is displayed in the **Overview**, **Reviews**, **Documentation**, **Relationships**, and other elements of the **Asset Detail**, as determined by the specific configuration in the **Asset Editor** and **Type Manager**.

- After performing an asset search, click any asset listed in the search results to open its **Asset Detail** in the bottom pane.



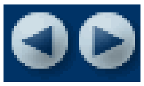
Note the icons in the title area of the asset detail. These icons offer a variety of viewing and navigation options to aid in the evaluation of assets.

- Click the  icon to expand the **Asset Detail**. (Click again to restore the search results list in the upper frame.)



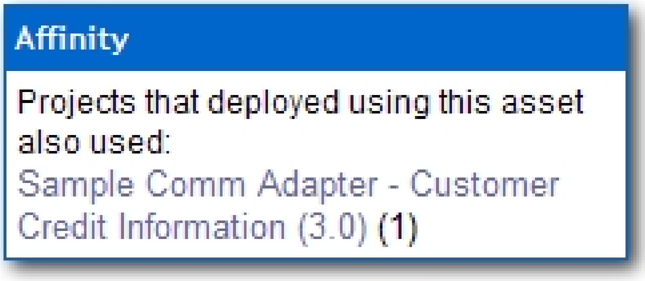
- Click the  icon to toggle the **Tabbed View** mode.

The **Tabbed View** places the information from each element in the default asset detail on its own tab. When viewing assets of the same type in **Tabbed View** mode, the selected tab appears for each asset selected from the search results, facilitating easy comparision of asset information. When viewing assets of different types, the selected tab will appear only if the assets have the tab in common. Otherwise, the system will default to the first tab listed in the asset detail.

- Click the  icons to navigate to the next/previous asset in the search results.

Asset Affinity

Within the context of ALER, **Affinity** is the condition that occurs when two or more assets are deployed in the same project. The **Affinity** element will appear in the asset detail for each asset that meets this condition, and will list other assets that have (deployed) projects in common.



Affinity provides valuable contextual information on asset use.

Using the Navigator

Prerequisite

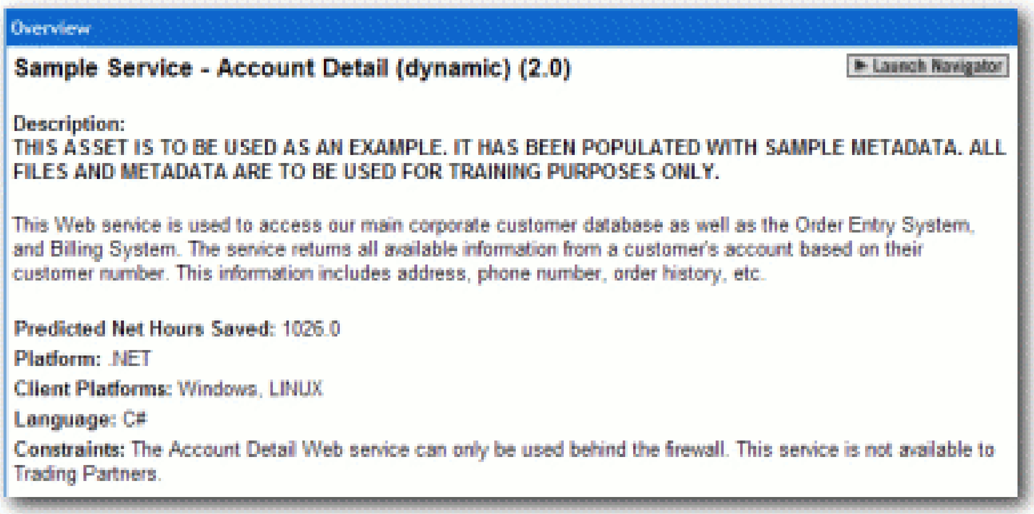
See **Functional Settings: Projects and Navigator** in the ALER Administration Guide for information on activating the Navigator.

Overview

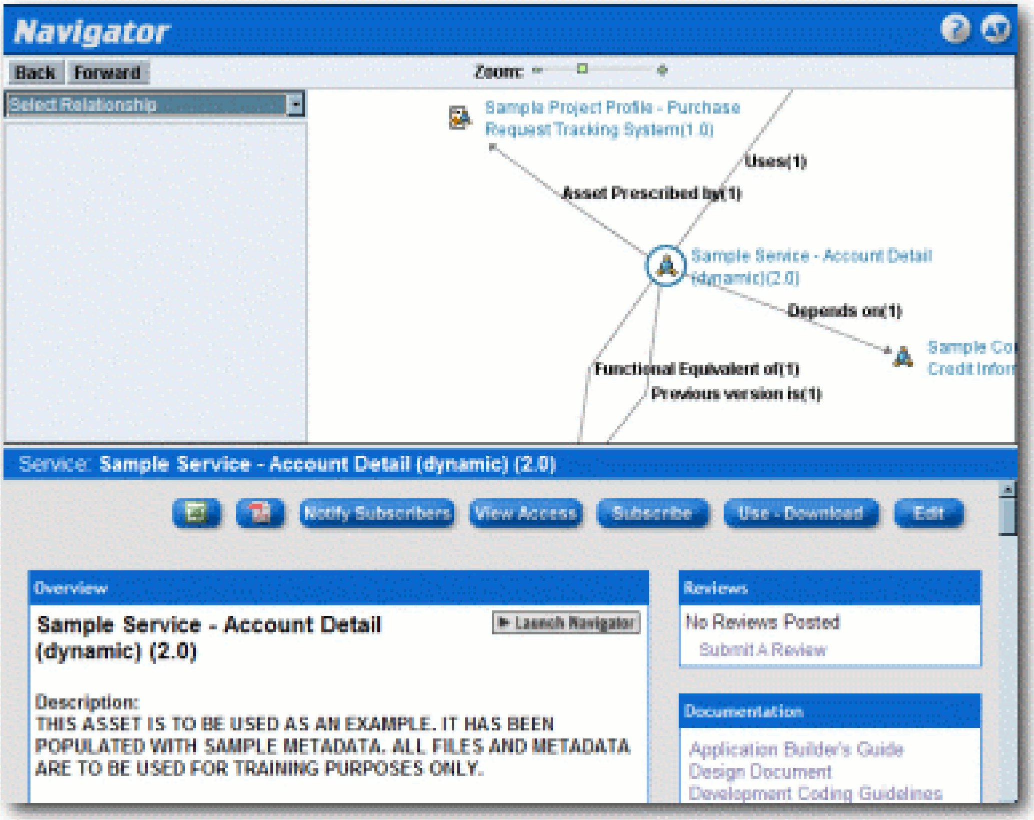
The AquaLogic Enterprise Repository **Navigator** provides a dynamic, three-dimensional graphical representation of assets and projects. This representation places the asset or project within the context of related resources within ALER.

Using the Navigator

Click ▶ Launch Navigator in the detail display of any asset or project.



The **Navigator** pop-up opens.



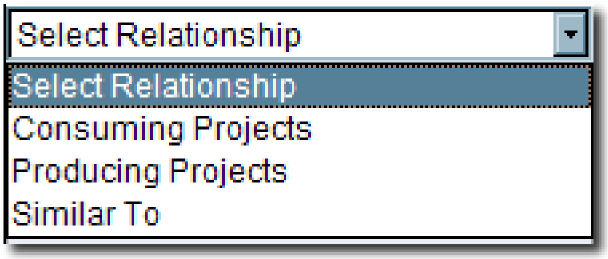
The Navigator View

The upper frame of the Navigator presents a dynamic, graphical display of the selected asset and all related assets and projects. The selected asset appears in the center of the upper frame of the Navigator display, as indicated by the asset icon within a blue circle. Any related assets and producing (the **Producing Projects** feature must be enabled) and/or consuming projects are displayed as nodes branching off the center. When a **Project** is centered, all parent and child projects are displayed, as are all assets produced or consumed by the centered project.

The lower frame of the Navigator presents the asset's detail, similar to the display on the ALER **Assets** screen.

Relationship View

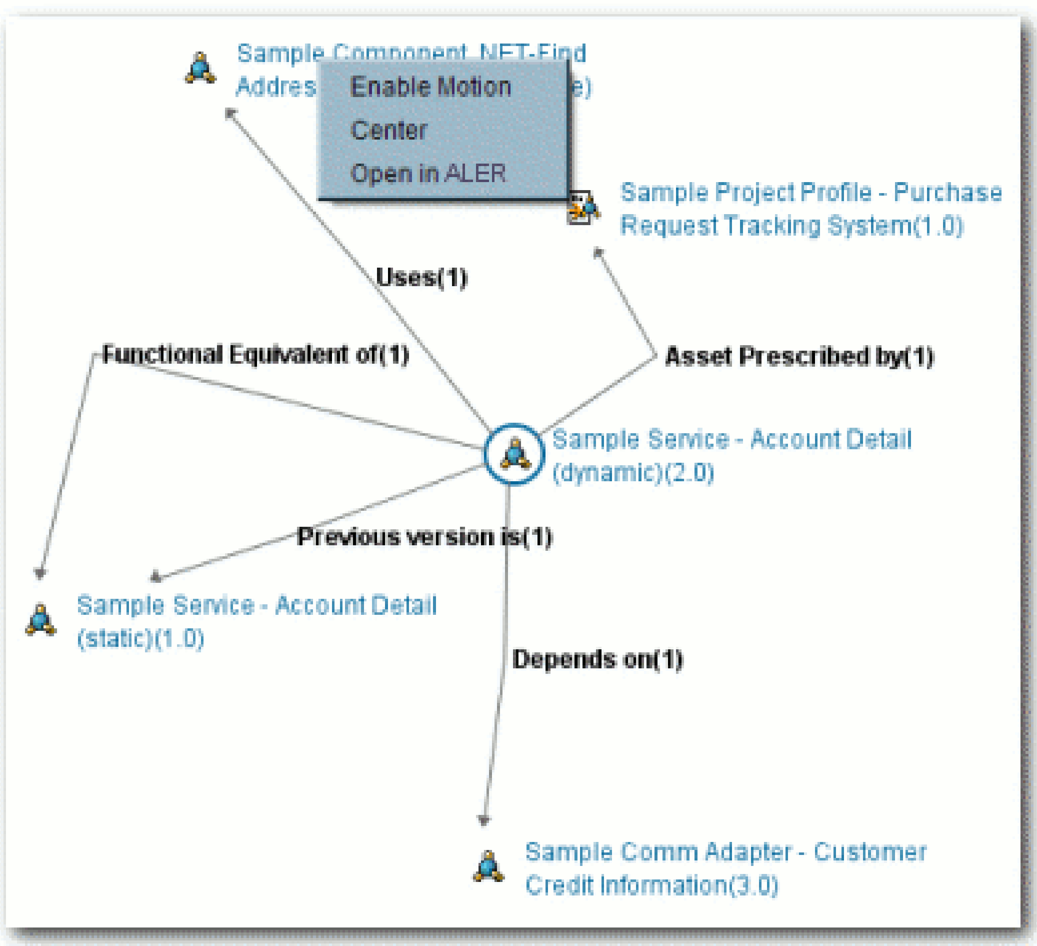
The **Select Relationship** menu displays a list of relationships relevant to the in-focus asset.



Click any relationship in the **Select Relationship** drop-down to view a list of assets or projects bearing the specified relationship to the focus asset. Click any item in that list to move that item to the center of the Navigator display.

Node Display Options

- Right click over any node in the display to open a menu of display options. The available options are determined by the type of node and its current display state.



- **Enable Motion**
  - Allows items in the display to be dragged around the window to aid viewing.
- **Center**
  - Shifts the focus to the selected item, and displays any available related assets or projects. (Does not change the detail display in the lower pane.)
    - Action can also be toggled by *single-clicking* the node icon.
- **Open in ALER**
  - Displays the item's detail in the bottom pane.
    - Action can also be toggled by *double-clicking* the node icon.

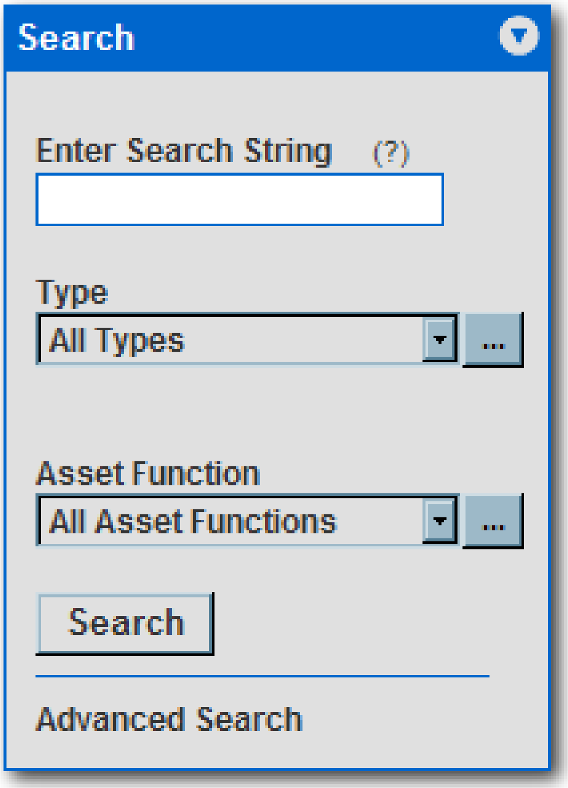
- Double-clicking any relationship node (**Depends on**, **Producing Projects**, and so on) expands/collapses the node.

Export Asset Detail to Excel

Export an Excel File from Search Results

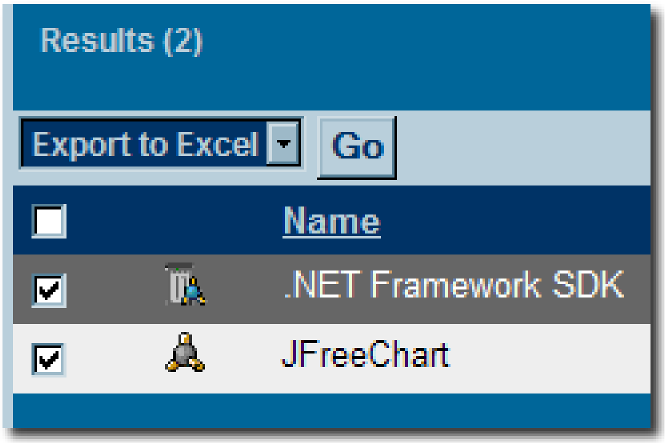
This procedure is performed on the AquaLogic Enterprise Repository **Assets** screen.

1. Perform an asset search by entering the appropriate terms in the **Keyword** text box in the **Search** section.



Use the **Type** and **Asset Function** drop-down menus as necessary to refine the search.

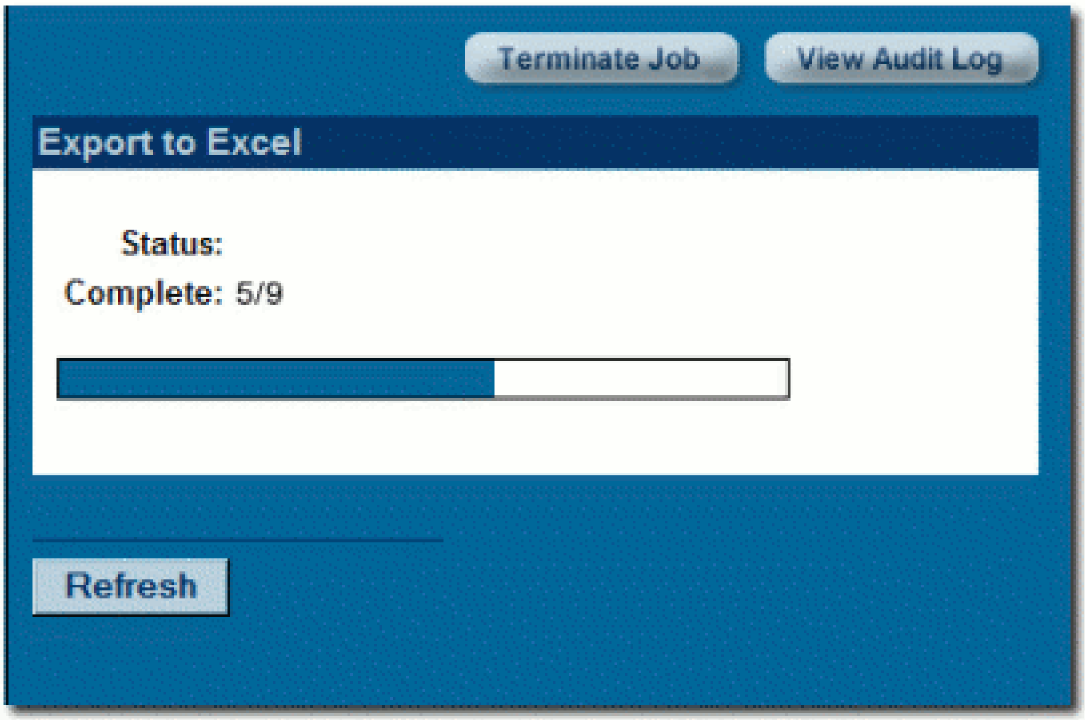
2. Select one or more assets from the search results by placing a check in the checkbox that appears to the left of assets listed in the **Search Results** pane.



3. Select **Export to Excel** in the drop-down at the top of the pane.

4. Click the **Go** button.

   Export progress is indicated in the progress window.

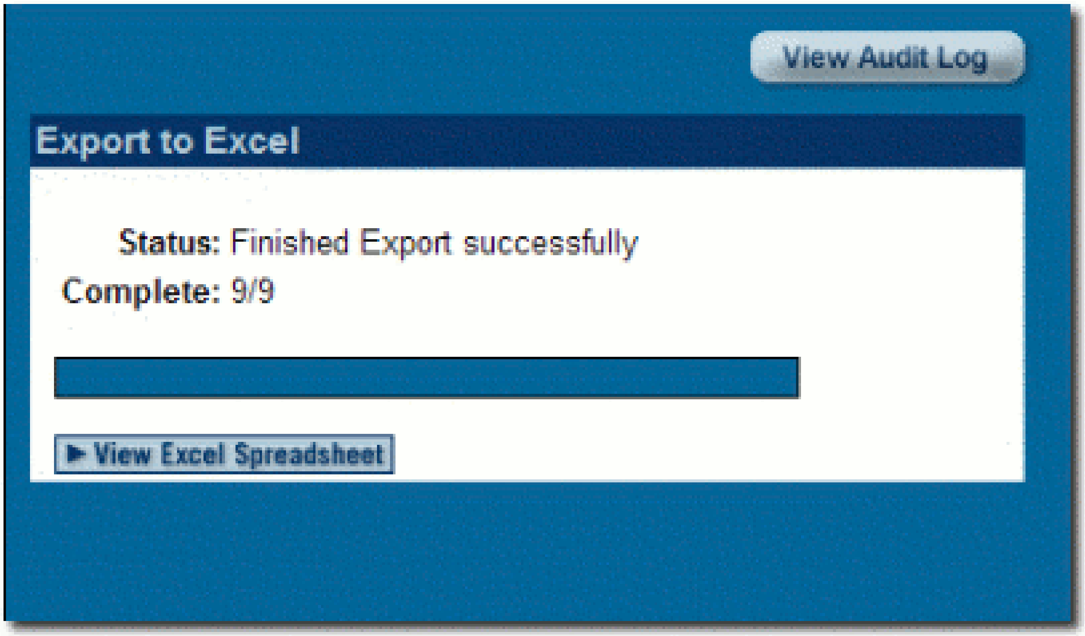


   - **Options:**

     - Click **Terminate Job** to end the export.

     - Click **View Audit Log** to open a log of the export process.

5. When the export is complete, click the **View Excel Spreadsheet** button in the progress window.



The spreadsheet opens in Microsoft® Excel®.

	A	B	C
1	Type Name: Component	Number of Assets: 2	Time of Export: Mon Jan 09 16:46:01 EST 2006
2		Sample Component .NET-Find Address Method (Beta Release)	Sample Component J2EE - Order EJB (2.0)
3	Overview		
4	Name	Sample Component .NET-Find Address Method (Beta Release)	Sample Component J2EE - Order EJB (2.0)
5	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. Using the Microsoft MapPoint web service, this component finds geographic locations in a specified data source based on an address. An array of possible results ordered by score, the top score, the number of results found, and the index into the array of results, is returned as a FindResults object. Maximum returned values is 250. Default number of returned results is 25.	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. Order EJB provides the ability to view the details of a customer order. This Sample Application is for the Java 2 Platform, Enterprise Edition Order EJB Component.
6	Predicted Net Hours Saved	342	855
7	Platform	.NET	J2EE
8	Client Platforms	IE	Windows
9		Netscape	
10		Mozilla	
11	Language	C#	Java
12	Constraints	The FindAddress method is valid with only the MapPoint.EU and MapPoint.NA data sources. For a table of the available data sources and the functions that can be performed on the data source, see MapPoint .NET Data Sources and Capabilities.	Customer orders must have been approved befored viewed with this component. The order validation process requires manual intervention and lag time can be up to one hour.
13	Packaging Description	Modifiable source files have been compbined and are available in a single .zip file.	Class library is packaged as a .zip file
14			
15	Taxonomy		
16	Asset Type	Component	Component
17	Classification	Educational	Recommended
18	Asset Function	Customer Information Acquisition	Application Adapters
19		Geographic Address Locators	Customer Information Acquisition
20	Domains	Customer Service	Customer Service
21		Marketing	Finance/Accounting
22		Sales & Distribution	Sales & Distribution
23	Line Of Business	[Product Line 1]	[Product Line 1]
24		[Service Offering 2]	[Product Line 2]
25			[Service Offering 1]
26			[Service Offering 2]
27	Technology	.NET	J2EE
28	Keywords	gps	commerce
29		street address	inventory

Component / Patterns / Service / Application

Assets are listed horizontally; **Asset Detail** elements are indicated by the light-green background (**Overview** and **Taxonomy** in the example above).

When assets of multiple types are exported, each type is assigned to a different worksheet tab.

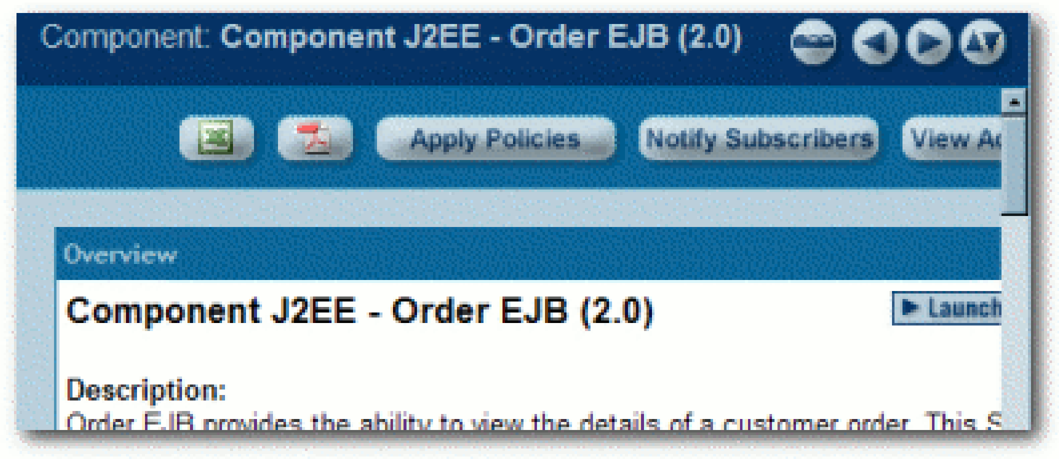
- **Note:**
  - The specific configuration of each asset type template determines the asset detail elements that will be exported to the spreadsheet.
  - System limitations prevent the export of the Relationships, Keywords, Contacts, Reviews, and Useage elements, and of tables, images, or HTML formatting.
  - Limitations in Excel restrict export to no more than 250 assets of the same type during the same export.

Export an Excel file from the Asset Detail

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

1. Locate the appropriate asset.

2. Click  in the asset detail.

   Export progress is indicated in the progress window.

3. When the export is complete, click the **View Excel Spreadsheet** button in the progress window to open the spreadsheet in Microsoft® Excel®.

   Note: The specific configuration of each asset type template determines the asset detail elements that will be exported to the spreadsheet.

Export to ZIP

Overview

When enabled, the **Export to ZIP** feature allows the export of asset information to a ZIP file, via a menu selection on the asset search results screen.

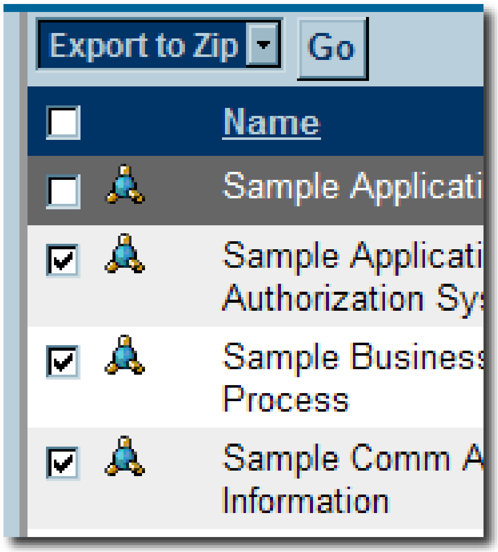
- The **Export to ZIP** feature is available only to users with **Administrator** permissions.
- **Import/Export** must be enabled. (See: *AquaLogic Enterprise Repository Import/ Export Tool User Guide*)
- The exported file contains all asset metadata in XML format, including relationships.

Exporting Asset Information to a ZIP file

This procedure is performed in the **Search Results** frame on the AquaLogic Enterprise Repository **Assets** screen.

1. Use **Search** or other means to locate the asset(s) to be exported to a ZIP file.

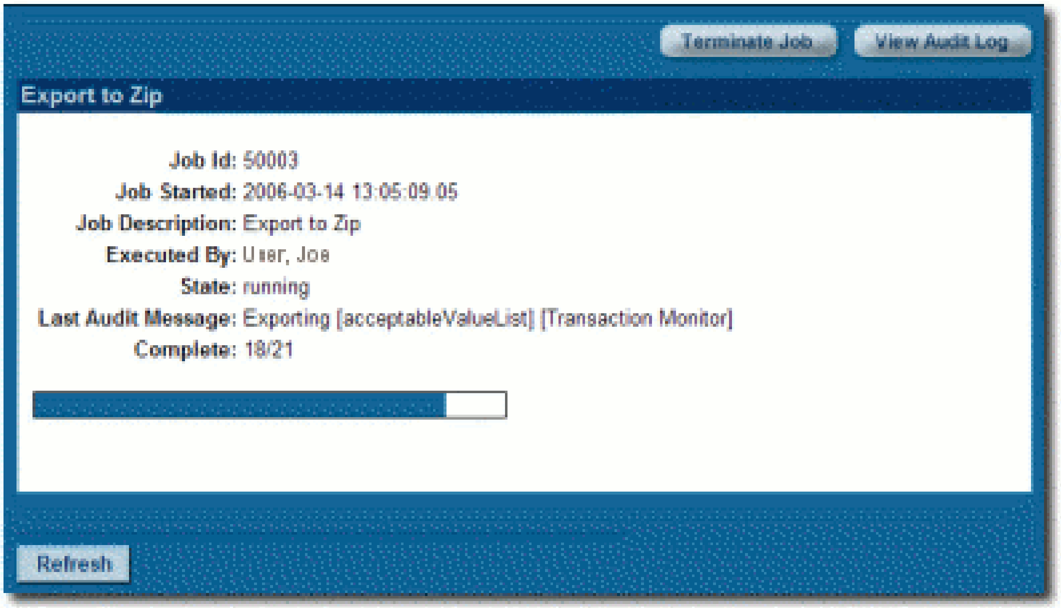
2. Use the checkboxes in the search results list to select the assets to be exported to ZIP.



3. Select **Export to ZIP** from the drop-down.

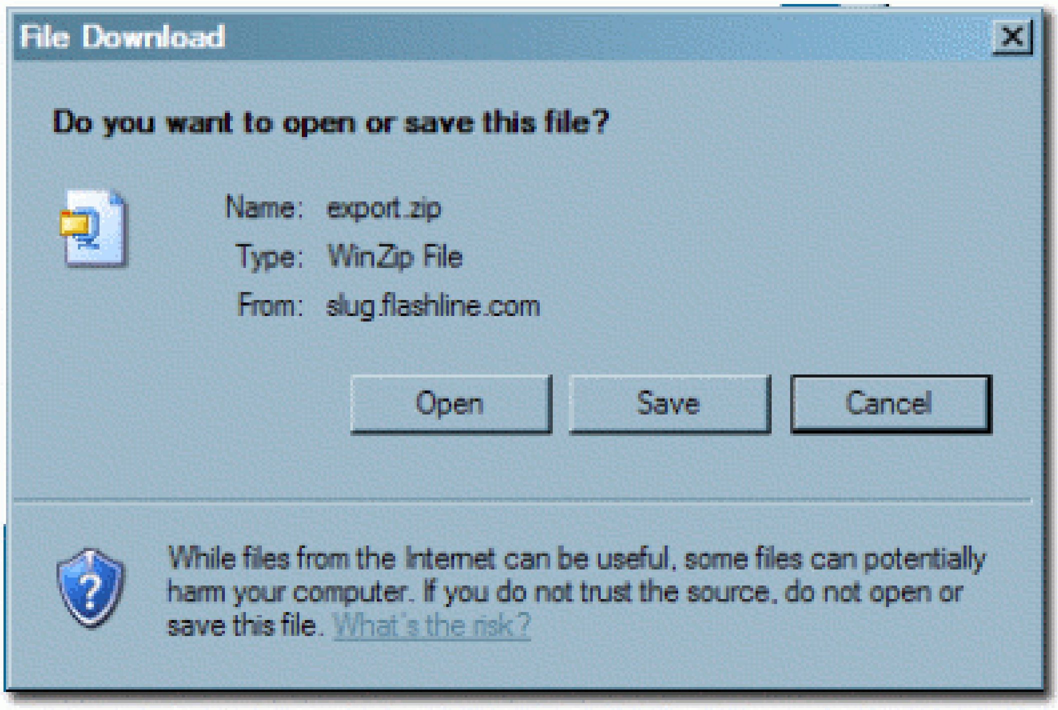
4. Click the **Go** button.

   The **Export to ZIP** progress pop-up opens.



5. When the export is complete, click the **Download** button to download the exported zip file.

   The **File Download** pop-up opens.

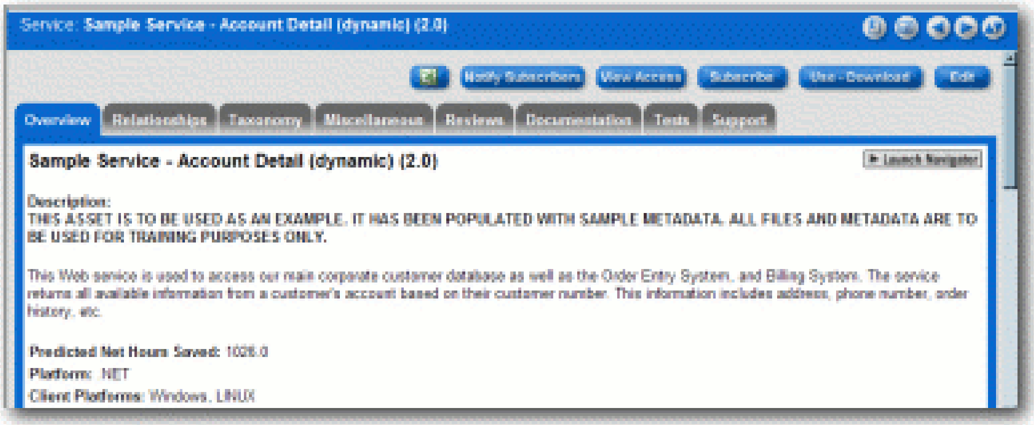


6. Select **Open**, **Save**, or **Cancel**, as appropriate.

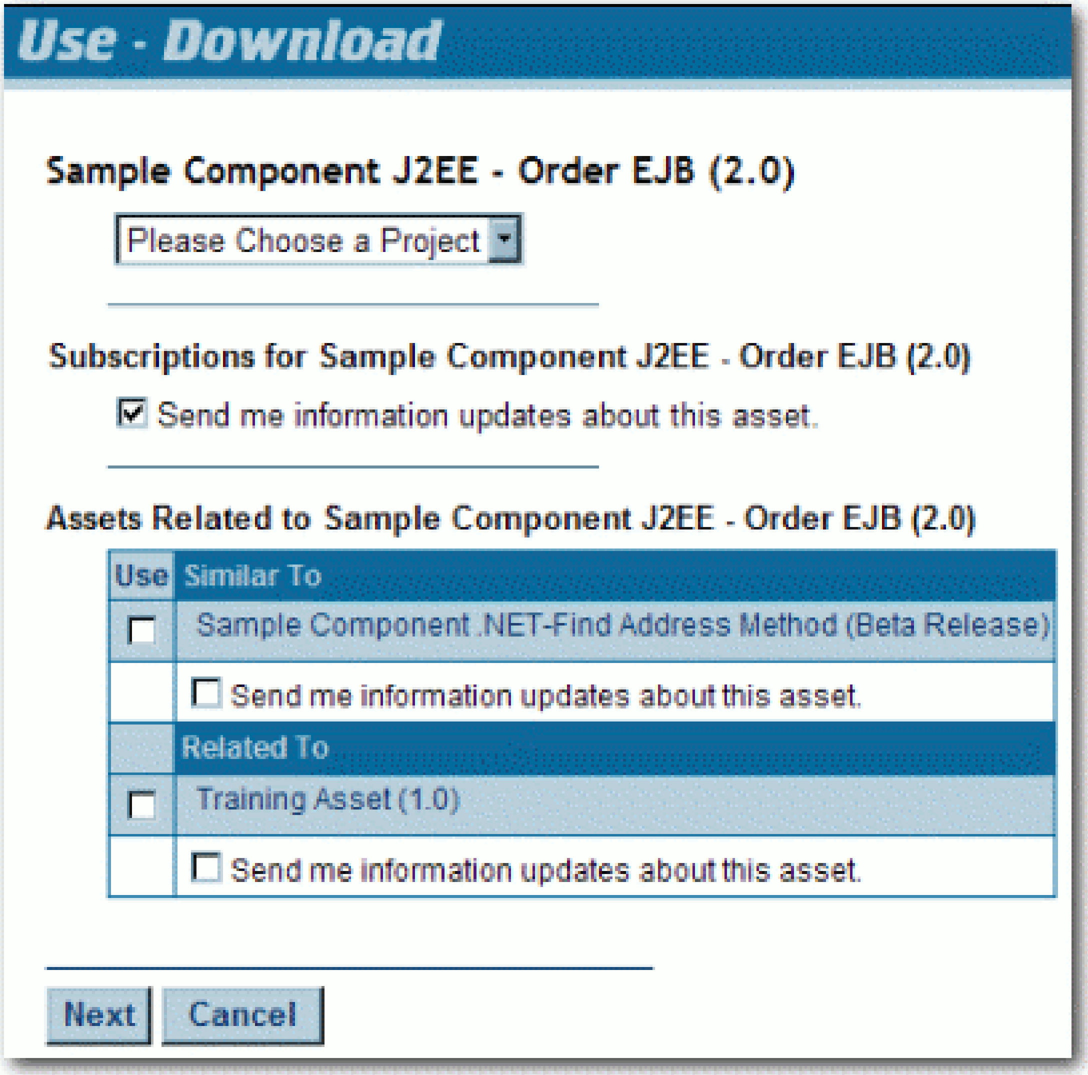
Using/Downloading an Asset

1. Use **Search** or other means to locate the asset to be used.

2. Click the **Use / Download** button in the asset detail.



The **Use - Download** pop-up appears.



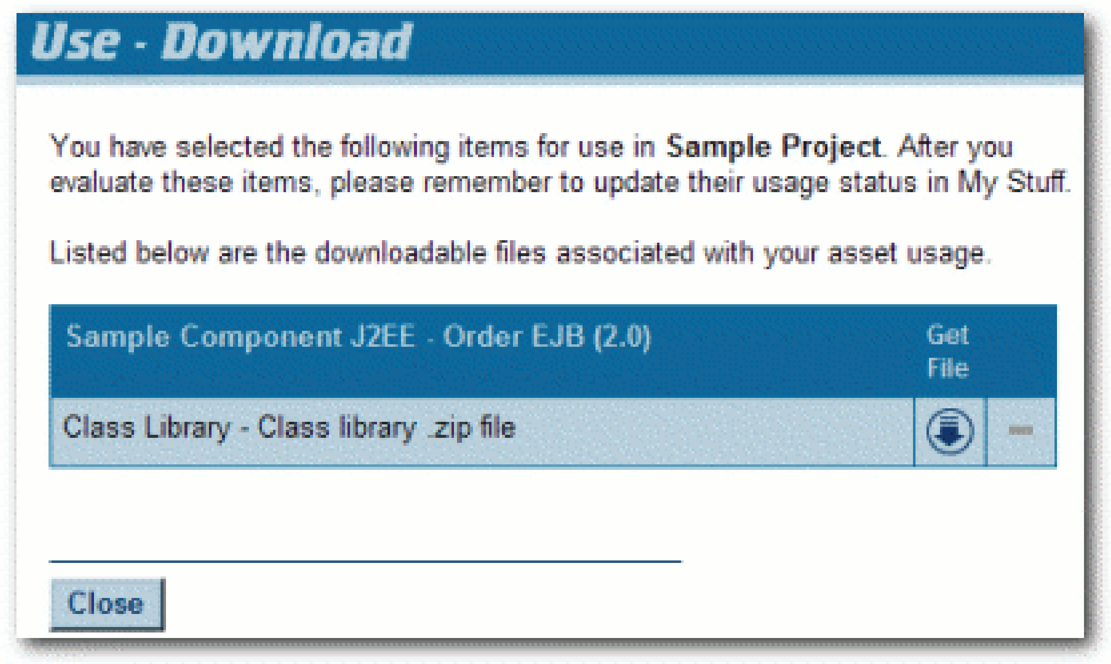
3. Use the **Please Choose a Project** drop-down to assign the asset to a project (mandatory).

4. Make the appropriate selection in the **Subscription** checkbox.

5. As necessary, select any available related assets for inclusion in the download and/or subscription.

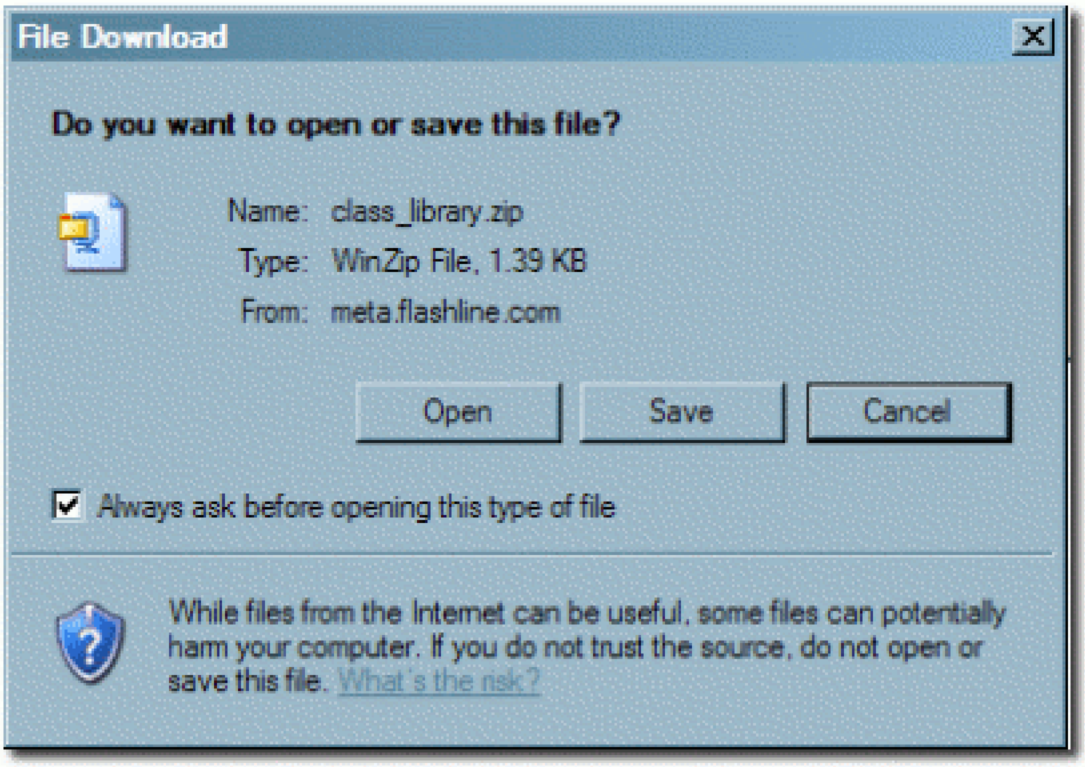
6. Click **Next**.

   A new pop-up opens to display the downloadable files in the asset payload.



7. Click the **Get File** icon.

   The **File Download** pop-up opens.



8. Proceed with the download as necessary.

9. Repeat Steps 7 and 8 as necessary to download other files in the asset payload.

10. When finished, click **Close** to close the **Use - Download** pop-up.

11. After evaluating the asset, be sure to **update** the asset's status on the **My Stuff** screen.

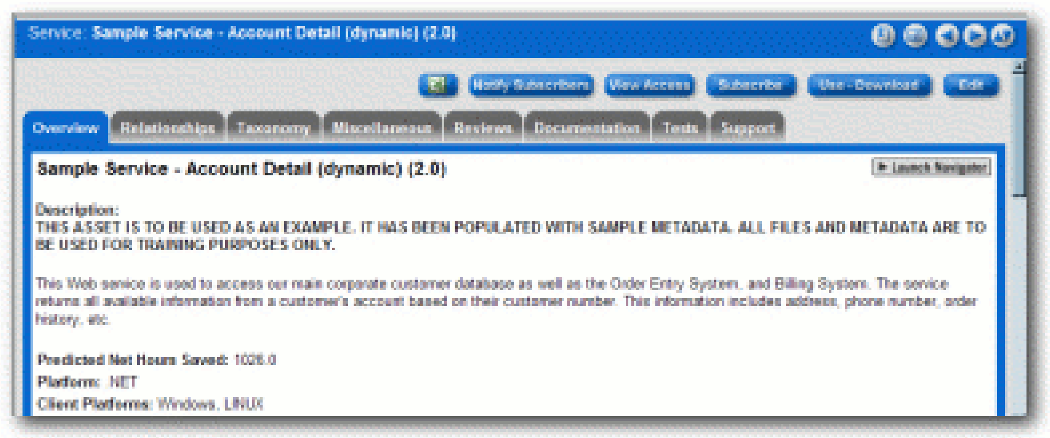
Asset Subscriptions

Overview

Users subscribed to an asset are automatically notified by email if a new version has been created or registered. Manual notification can also be used to communicate any metadata changes to the asset.

Subscribing to an Asset

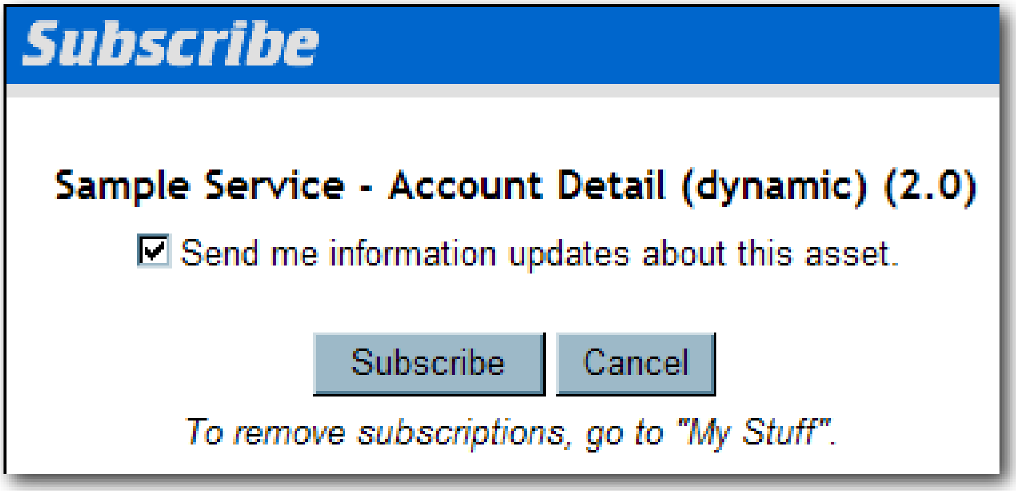
1. Use **Search** or other means to locate an asset.
2. Open the asset's detail display.



3. Click 

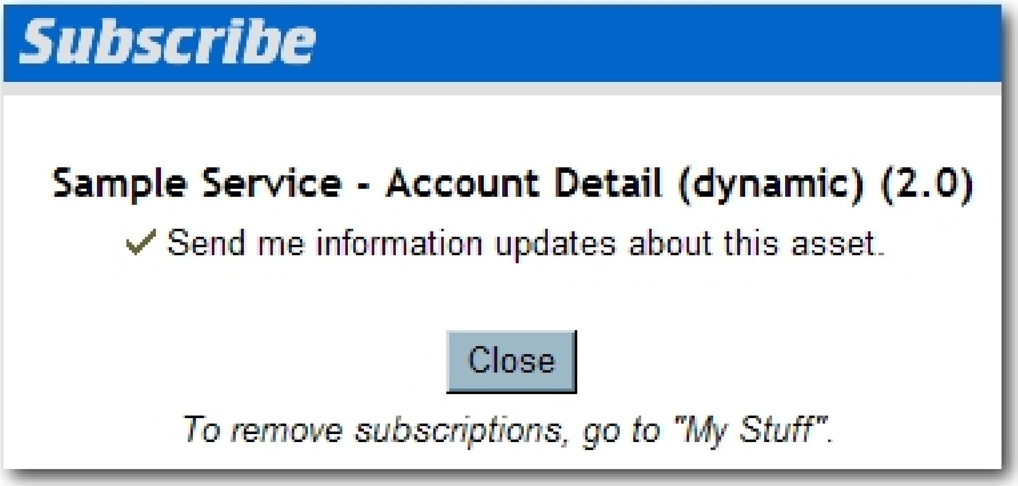
in the asset detail.

   The **Subscribe** pop-up opens.



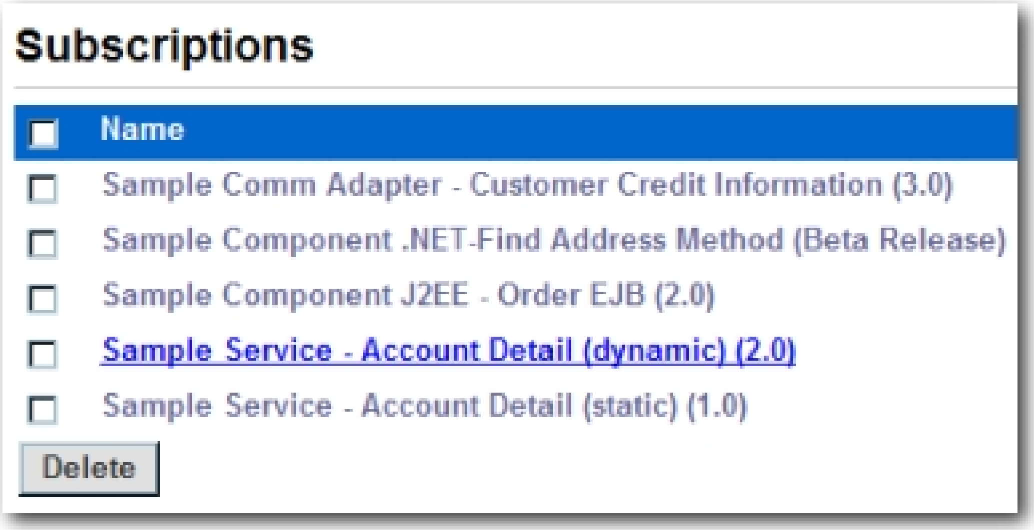
4. Click Subscribe

   The asset subscription pop-up appears.



5. Click Close

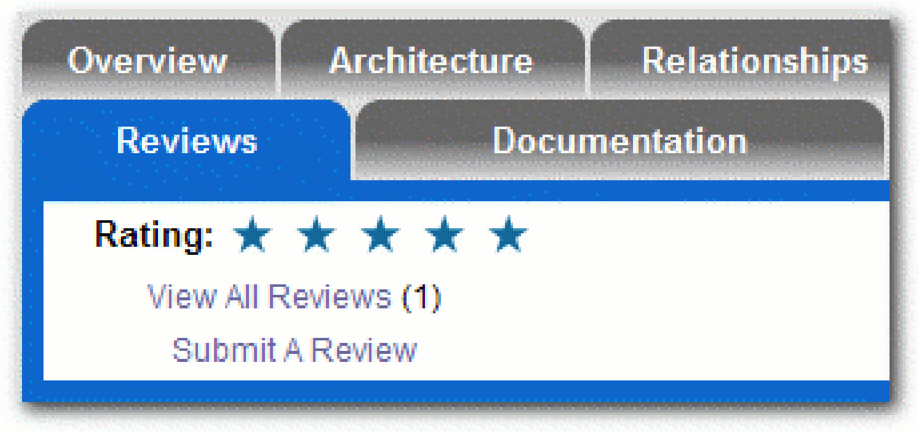
   The asset is added to the list of asset subscriptions on **My Stuff**


Subscriptions
Name
Sample Comm Adapter - Customer Credit Information (3.0)
Sample Component .NET-Find Address Method (Beta Release)
Sample Component J2EE - Order EJB (2.0)
Sample Service - Account Detail (dynamic) (2.0)
Sample Service - Account Detail (static) (1.0)
Delete

Reviewing Assets

1. Use **Search** or other means to locate the asset to be reviewed.

2. Click **Submit a Review** in the **Reviews** section of the asset detail.



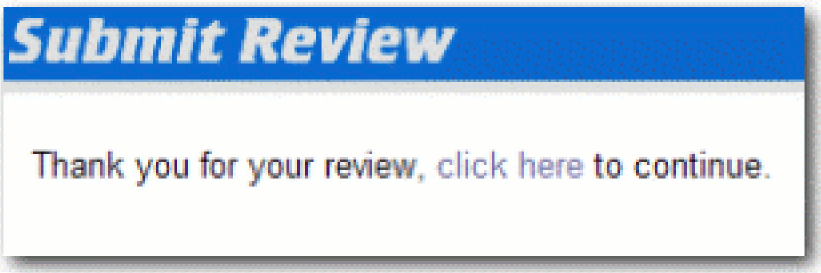
The **Submit Review** pop-up opens.

3. Select the appropriate rating from the **Rating** drop-down.

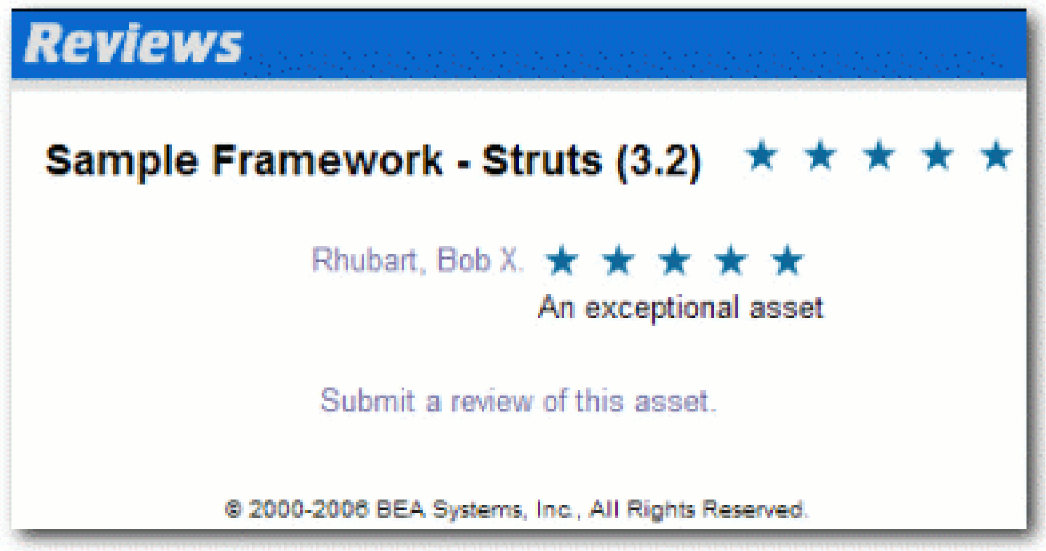
4. Enter the appropriate information in the **Comments** text box.

5. Click **Submit**.

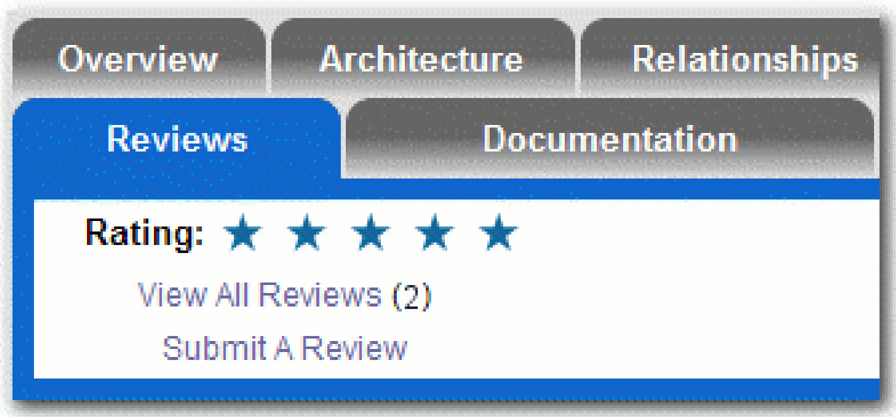
   A confirmation message appears.



6. Close the window, or click **click here** to display the review.



The review is now listed on the **Reviews** tab in the asset detail.



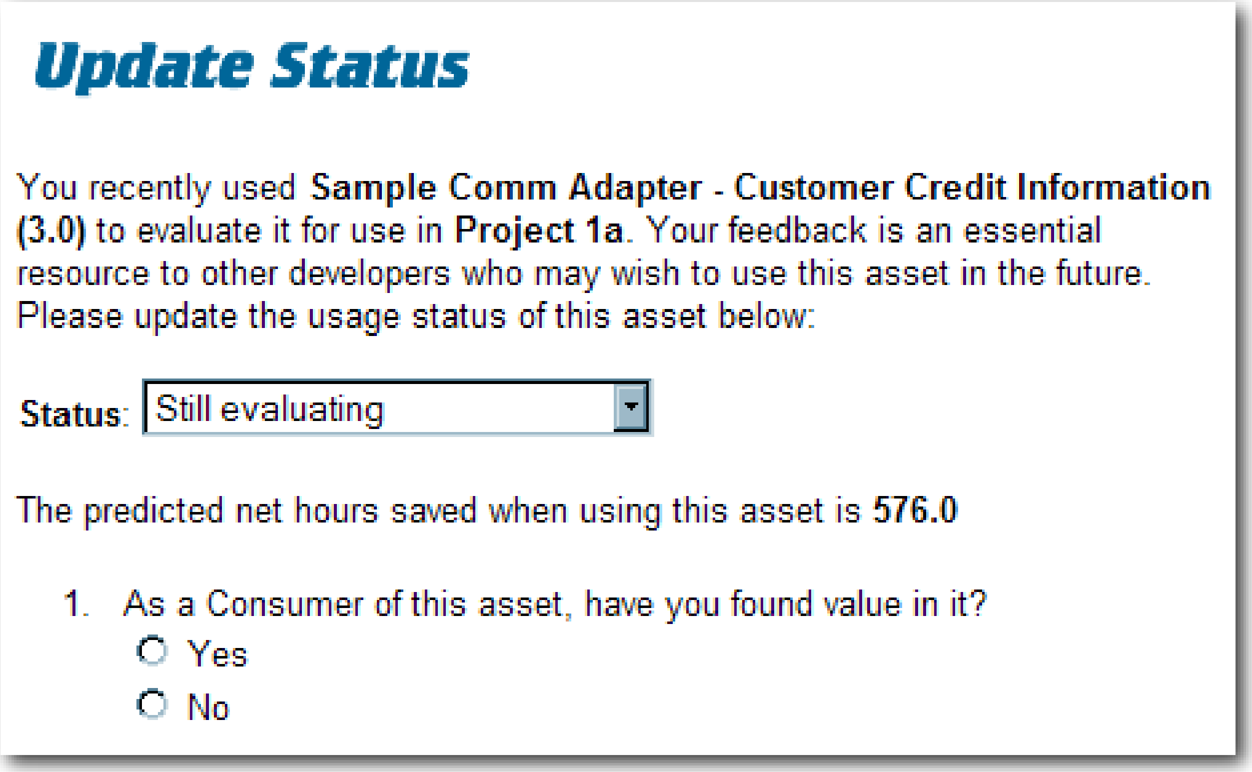
Consumer Survey of Asset Value

Overview

The **Consumer Survey of Asset Value** provides a general measure of an asset's value, usage context, and cost-to-use.

It is essential that the consumer of an asset complete the survey in order to provide robust, accurate metrics regarding the value of an asset as used in a particular project. The results of the consumer surveys are integrated in the BEA AquaLogic Enterprise Repository reports.

Survey Fields



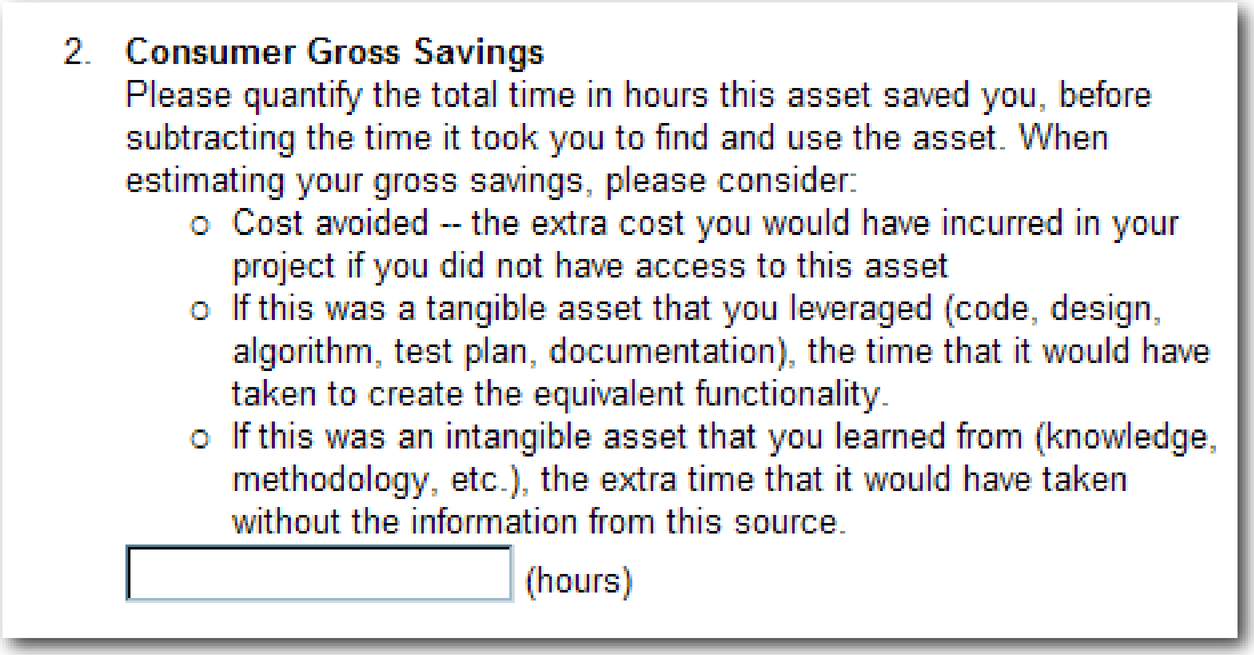
- **Status**

- Choices are:
    - *Still evaluating*
    - *Tentatively accepted for use*
    - *Reject this asset*

- **Note:** The user will continue to receive the **Usage Query 2** Notification email until usage status is updated.

1. Simple question, Yes/No response.

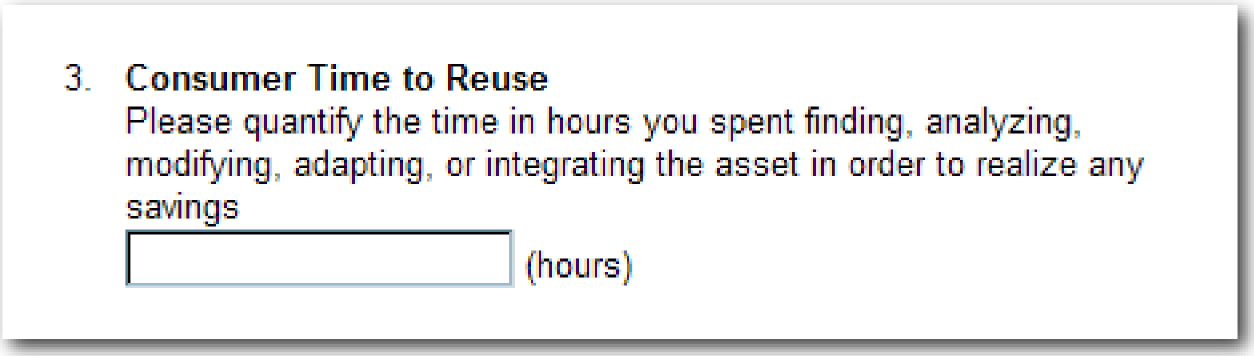
2. **Consumer Gross Savings** records the total time (hours) this asset saved the consumer.



2. **Consumer Gross Savings**
Please quantify the total time in hours this asset saved you, before subtracting the time it took you to find and use the asset. When estimating your gross savings, please consider:
    - Cost avoided -- the extra cost you would have incurred in your project if you did not have access to this asset
    - If this was a tangible asset that you leveraged (code, design, algorithm, test plan, documentation), the time that it would have taken to create the equivalent functionality.
    - If this was an intangible asset that you learned from (knowledge, methodology, etc.), the extra time that it would have taken without the information from this source.

(hours)

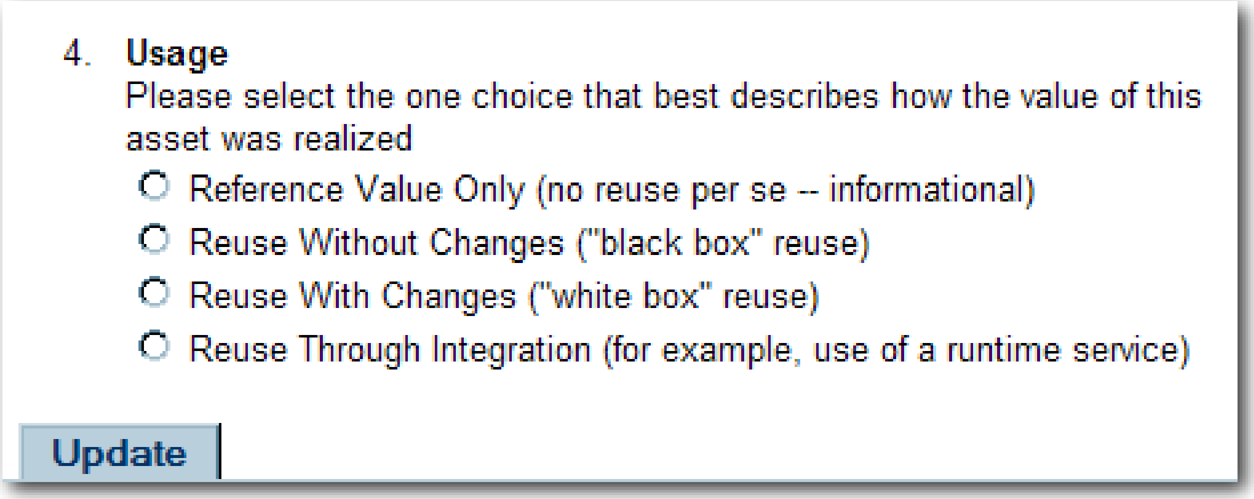
3. **Consumer Time to Reuse** records the total time (hours) it took for the consumer to use or integrate the asset in the project.



3. **Consumer Time to Reuse**
Please quantify the time in hours you spent finding, analyzing, modifying, adapting, or integrating the asset in order to realize any savings

(hours)

4. **Usage** records how the value of this asset was realized (reference, black box, white box, or reuse through integration).



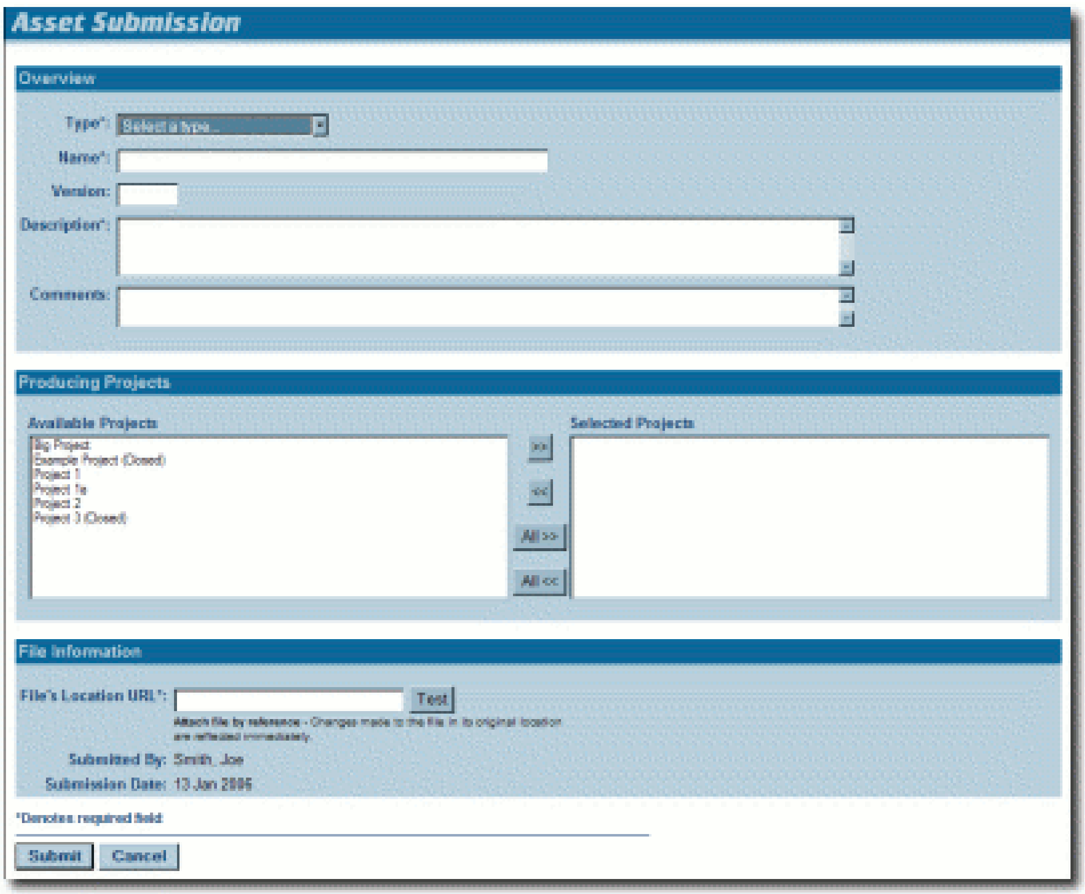
When the survey is complete, click **Update**.

Standard Asset Submission

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

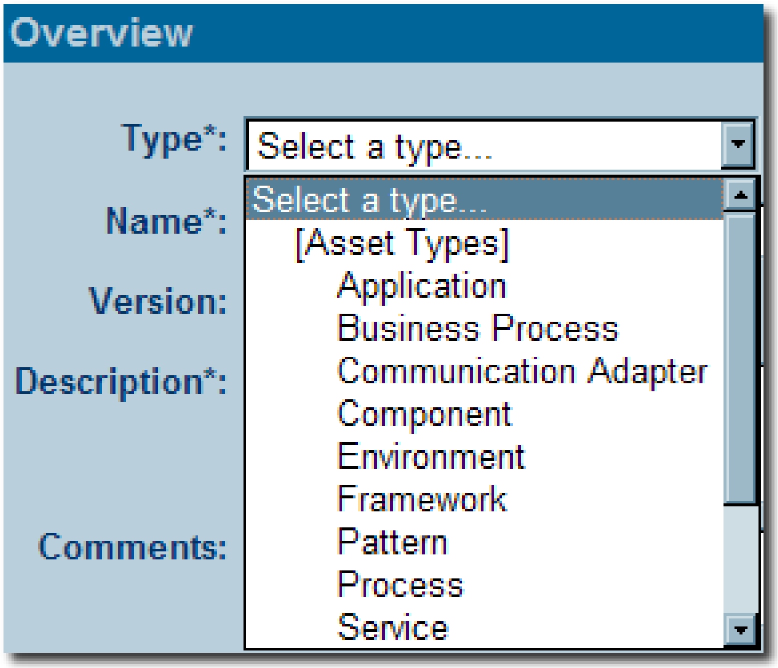
1. Click **Submit an Asset** in the sidebar.

The **Asset Submission** popup opens.

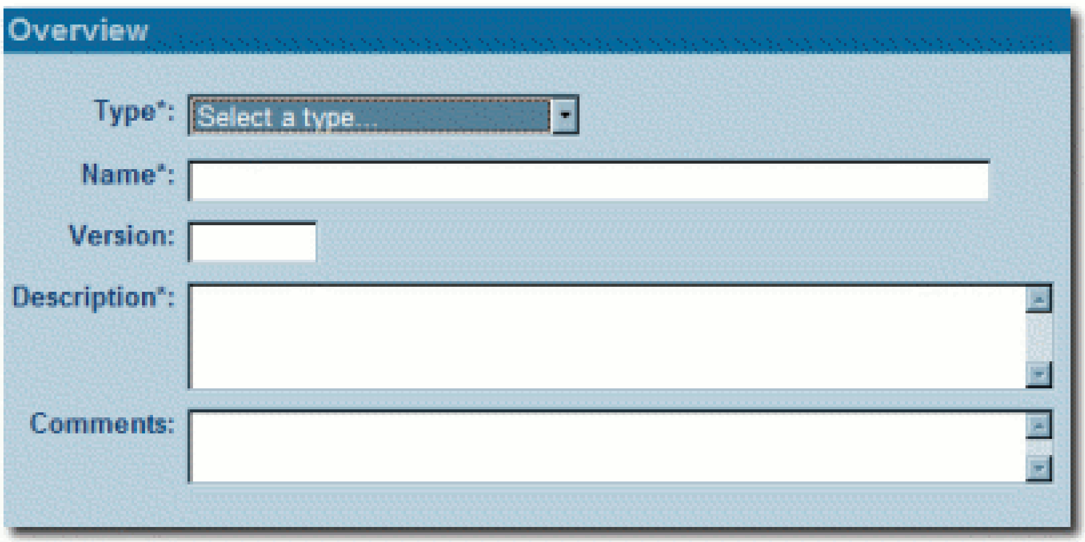


2. Select the appropriate **Type** template to apply to the asset from the drop-down in the

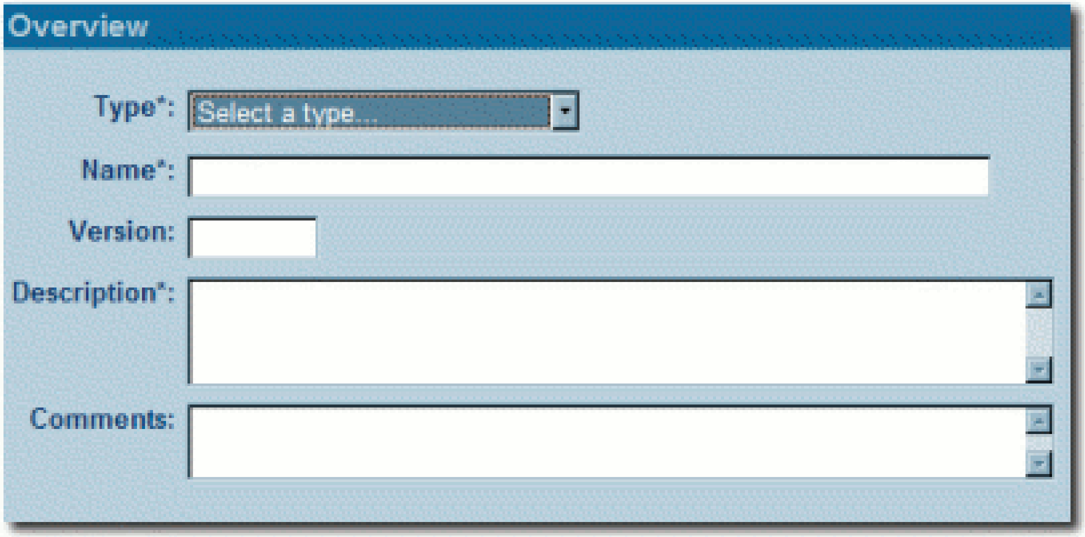
Overview section.



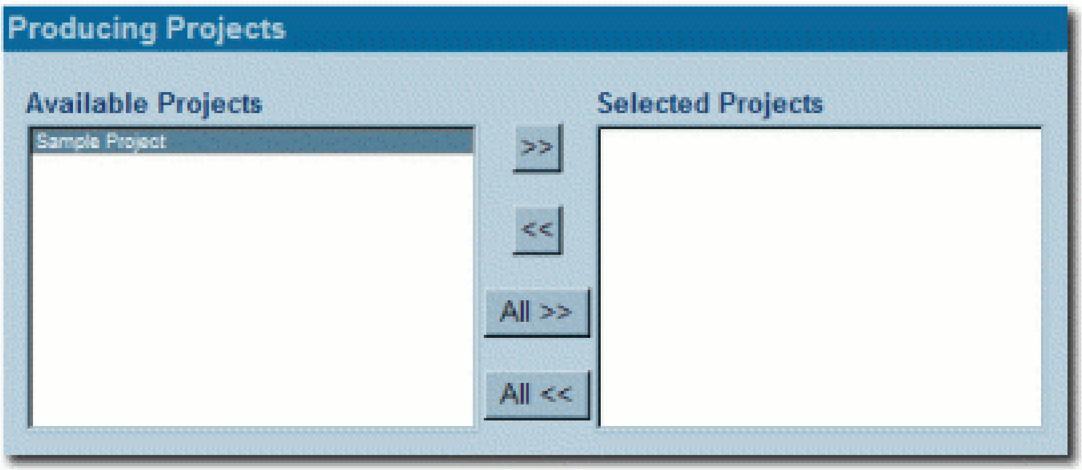
3. Enter the appropriate information in the **Name**, **Version**, and **Description** text boxes in the **Overview** section. (Required)



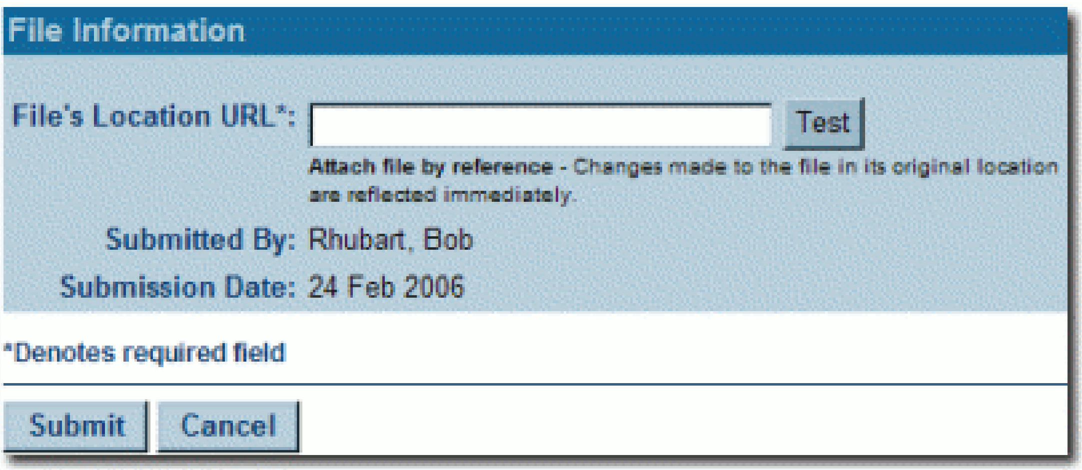
4. Enter the appropriate information in the **Comments** section. (Optional)



5. As necessary, designate the project that produced the asset by using the **>>** and **<<** buttons to move the appropriate item from the **Available Projects** to the **Selected Projects** columns.



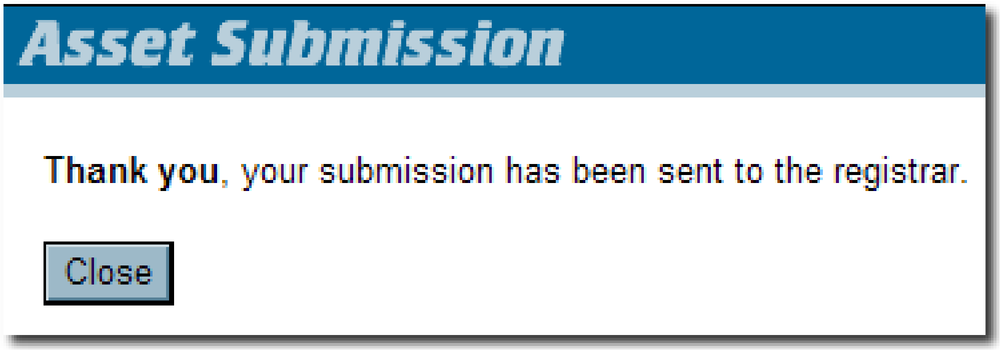
6. Enter the URL of the file containing the asset to be submitted in the **File's Location URL** text box in the **File Information** section. (Required)



7. Click the **Test** button to validate that the file location URL is correct.

8. When finished, click **Submit**.

   The **Asset Submission** confirmation pop-up appears, confirming that the asset has entered the asset registration queue.

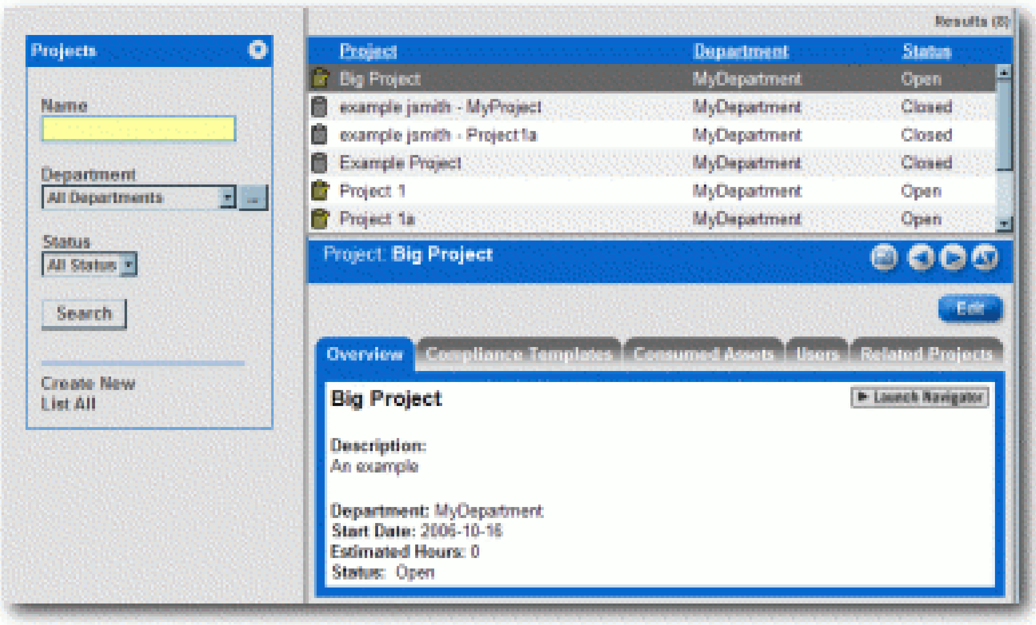


Note: See the AquaLogic Enterprise Repository **Registrar Guide** for information on advanced asset submission and the use of the **Asset Editor** and the **Type Manager**.

Projects

Overview

The AquaLogic Enterprise Repository **Projects** screen provides access to tools for creating and managing projects.

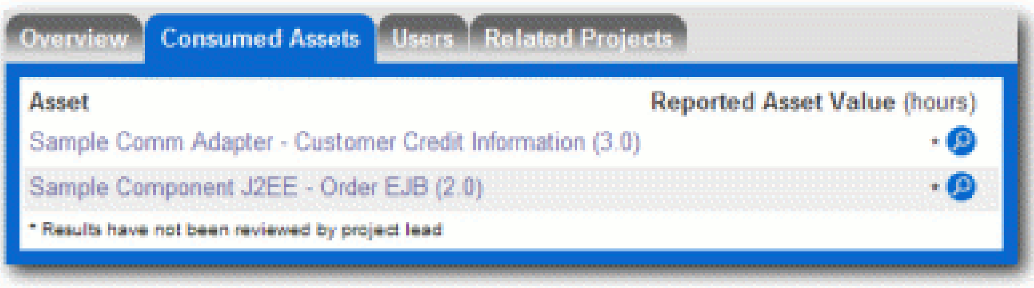


The Project Detail

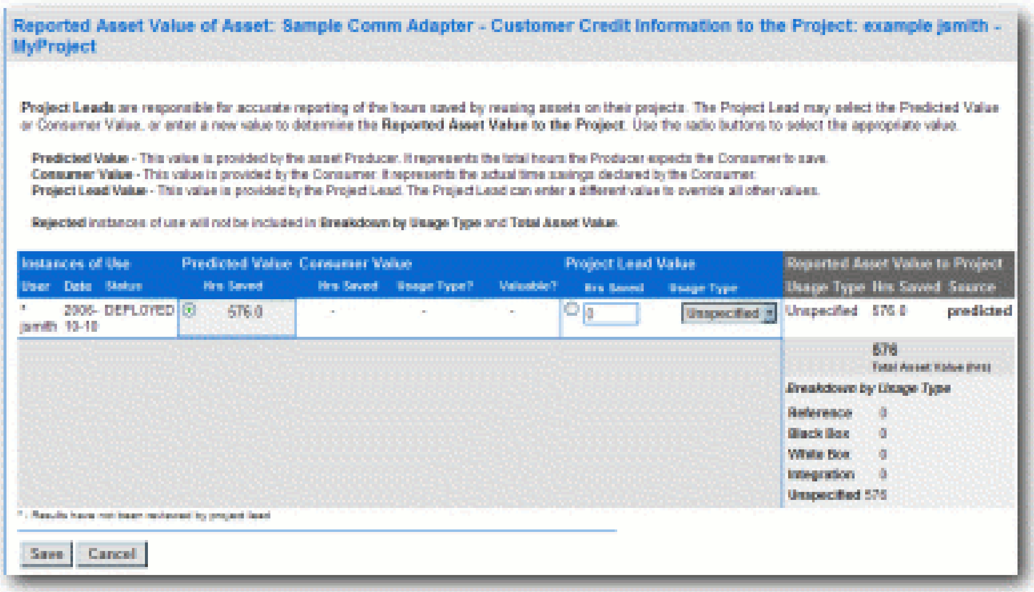
Project information is displayed in the same manner as asset information, via a series of tabs:

- **Overview**
  - Includes a project **Description**, and indicates the assigned **Department**, **Start Date**, **Estimated Hours**, and project **Status**.
- **Consumed Assets**

- ○ Lists any assets used in (or under consideration for use in) the project.

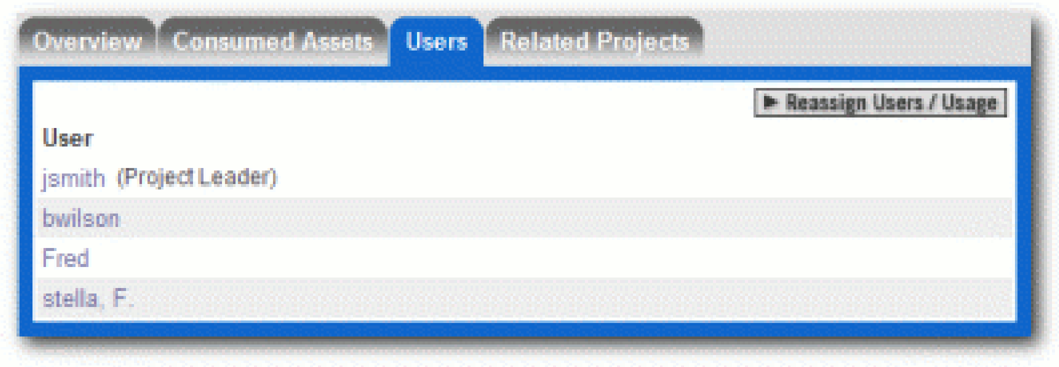


Click next to any listed asset to display its **Reported Asset Value**. (This feature is only available to the project leader.)



- **Produced Assets**
  - ○ Lists any assets produced by the project.

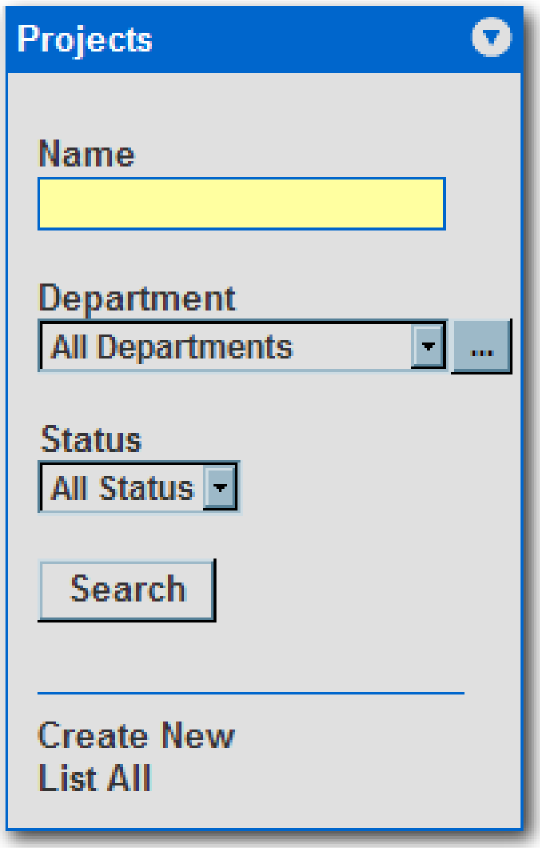
- **Users**
  - ○ Lists all users associated with the project, as well as each user's role on the project (leader/members).



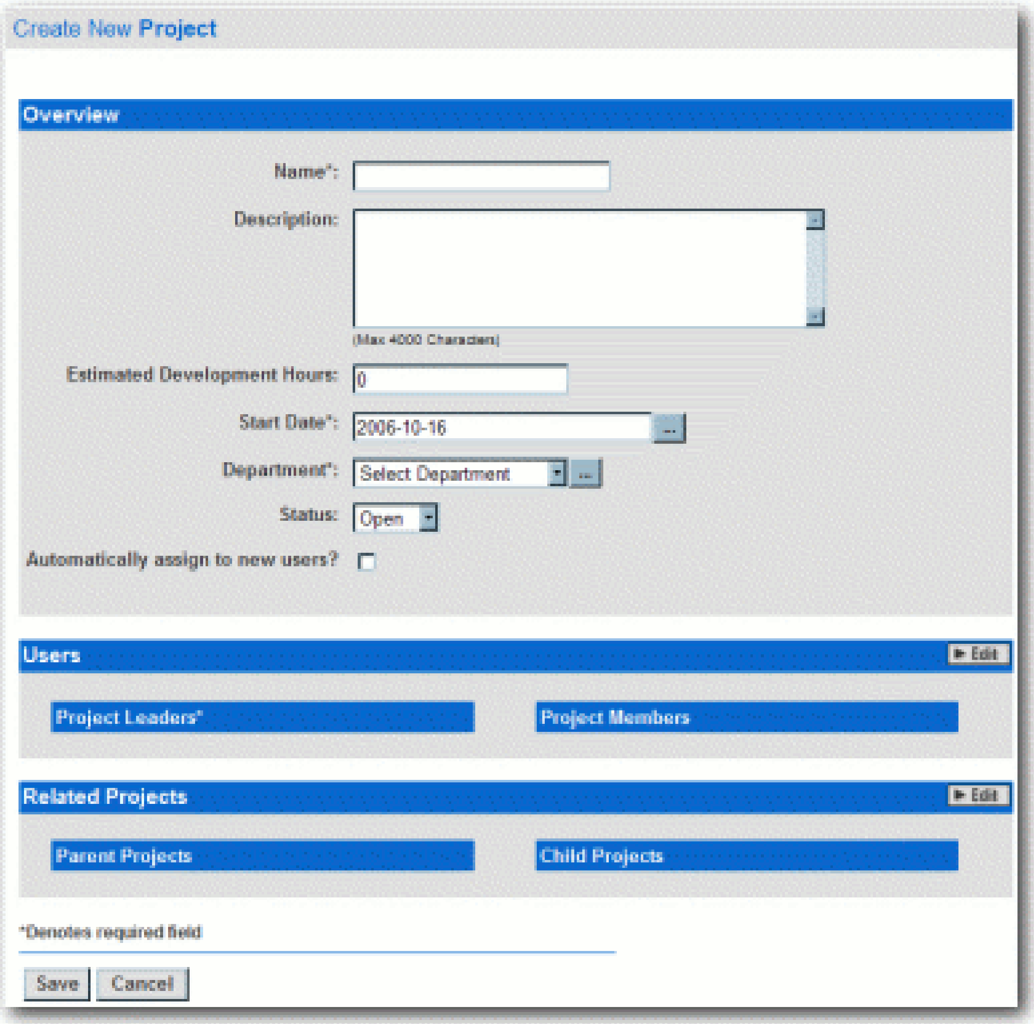
- **Related Projects**
  - When enabled, lists any related projects, and defines the relationships in parent/child terms.

Create a Project

1. Click **Create New** in the **Projects** sidebar.

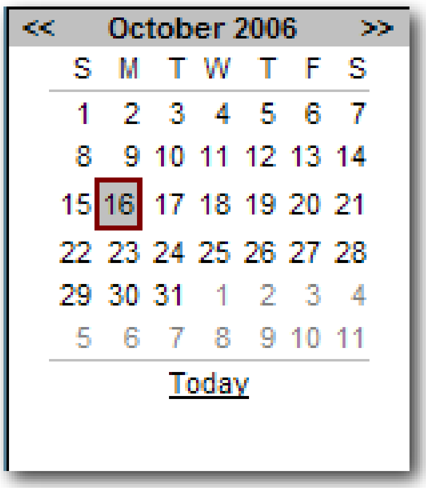


The **Create New Project** pop-up opens.

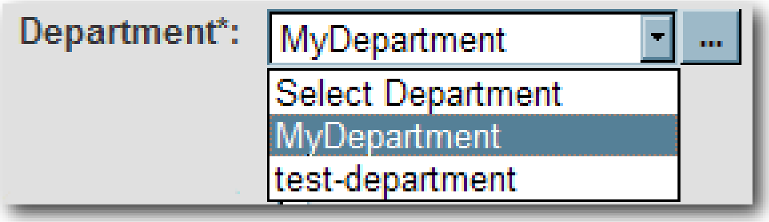


2. Enter the appropriate information in the **Name**, **Description**, and **Estimated Development Hours** text boxes.

3. Click  to open the calendar to select a **Start Date**.



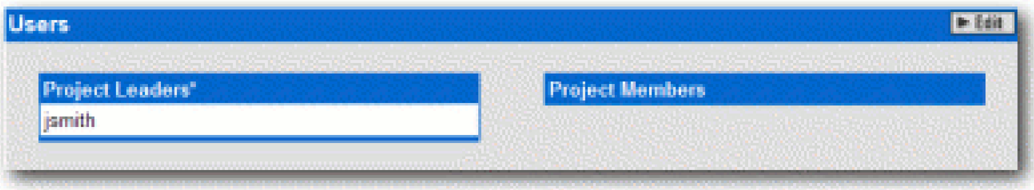
4. Select a department from the **Department** drop-down.



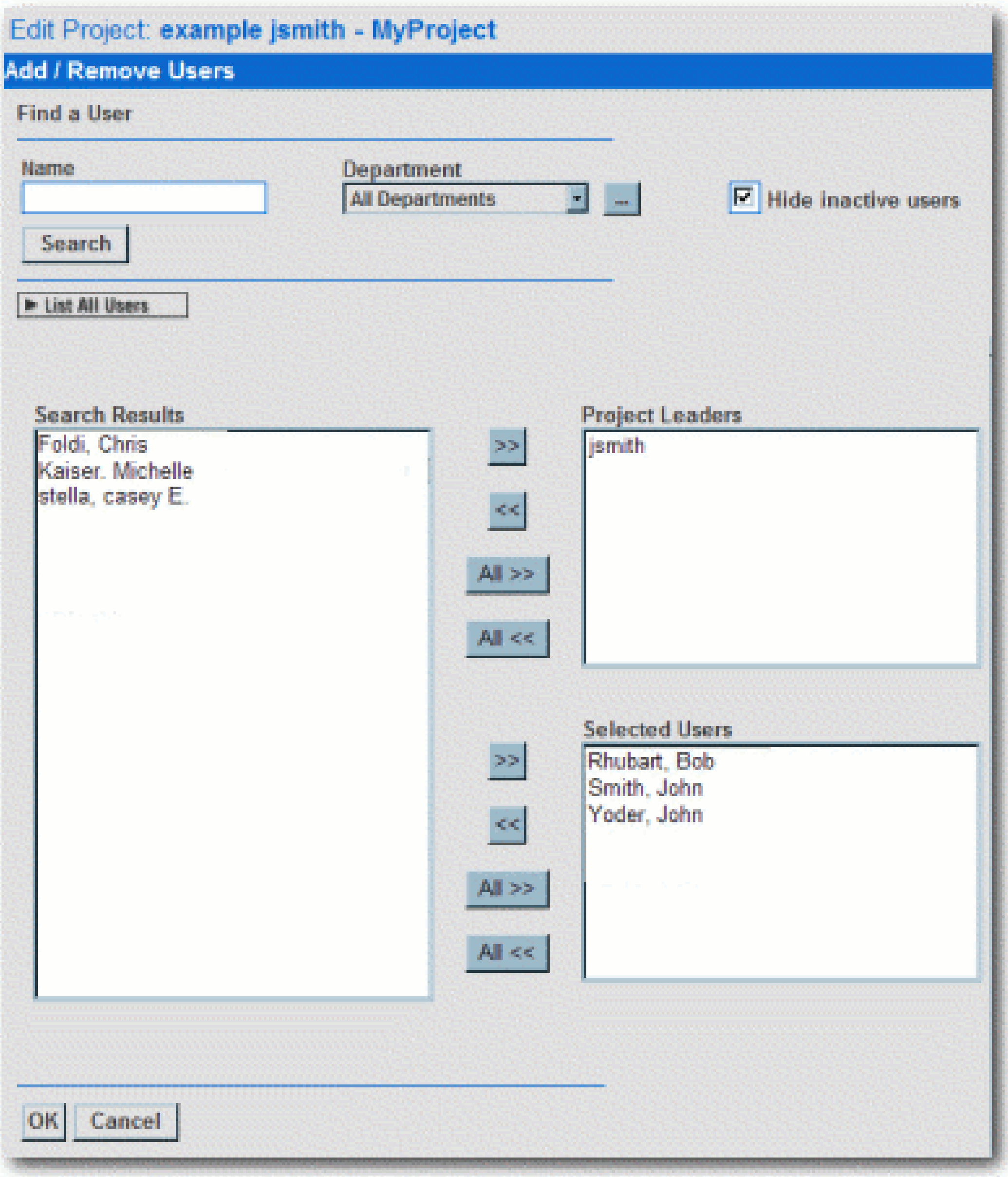
5. Select the appropriate status in the **Status** drop-down.

6. If necesssary, select **Automatically Assign New Users**.

7. Click **Edit** in the **Users** section.



The **Add / Remove Users** pop-up opens.



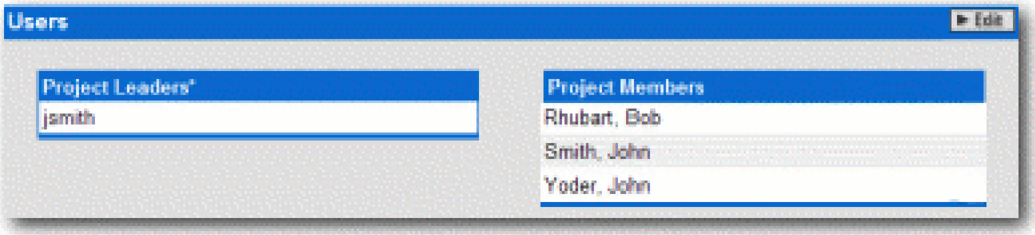
8. Use **Search** or **List All Users** to display a list of users in the **Search Results** section.

   - Use the **Department** drop-down to filter search results.

9. Use the **>>** and **<<** buttons to move users between the **Search Results**, **Project Leaders**, and **Selected Users** sections.

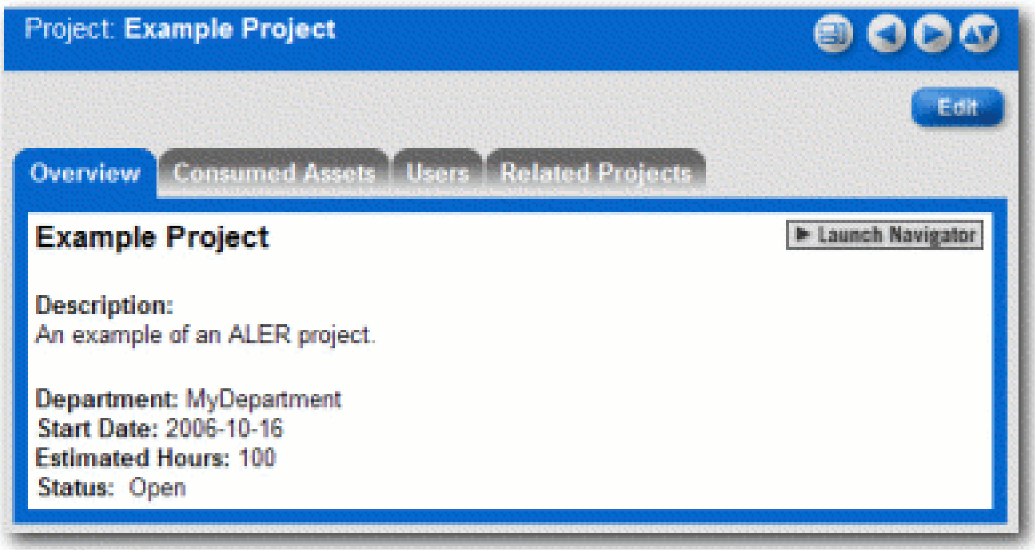
10. Click **OK**.

    The assigned **Project Leaders** and **Project Members** appear in the **Users** section of the **Create New Project** pop-up.



11. Click **Save**

    The **Create New Project** pop-up closes, and the new project detail appears on the **Projects** screen.

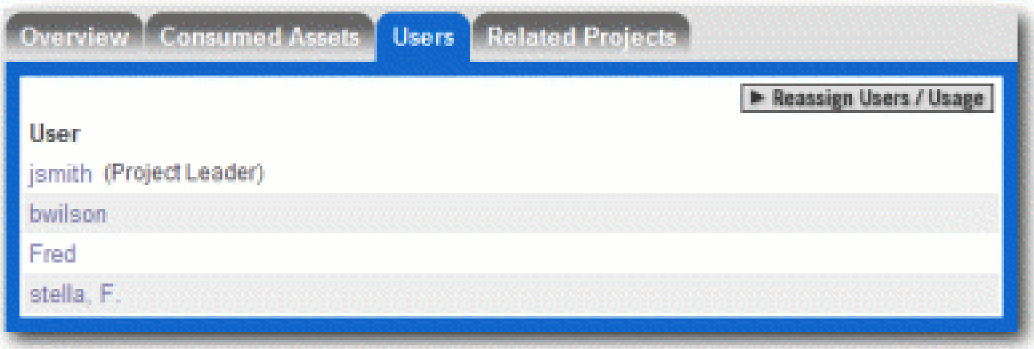


Edit a Project

1. Use **Search** or other means to locate the project to be edited.
2. Click the **Edit** button in the project detail.
3. Edit the project information as necessary. (See **Create a Project**.)

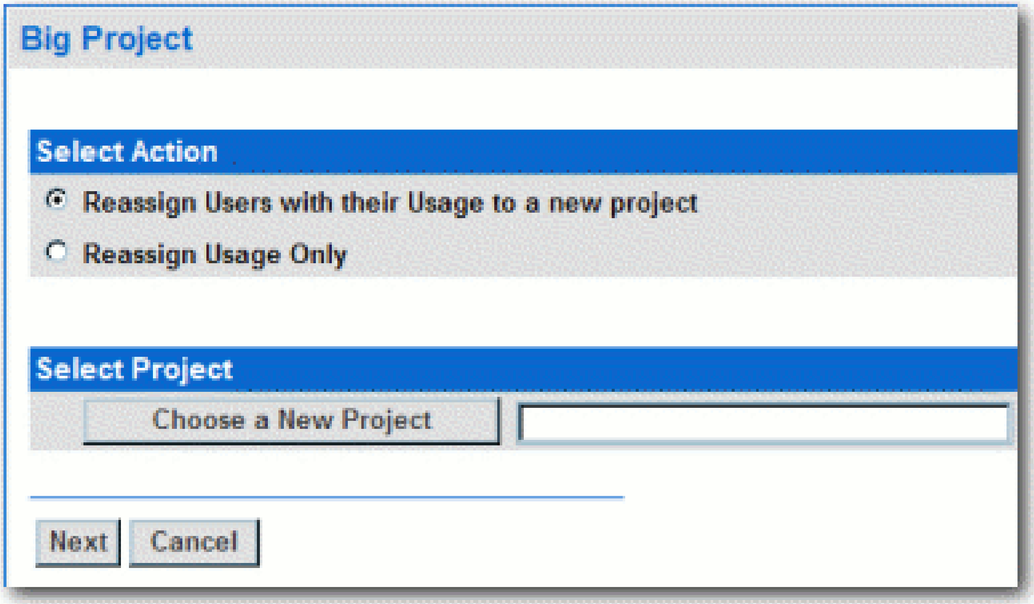
Reassign Users / Usage

1. Select the **Users** tab.



2. Click 

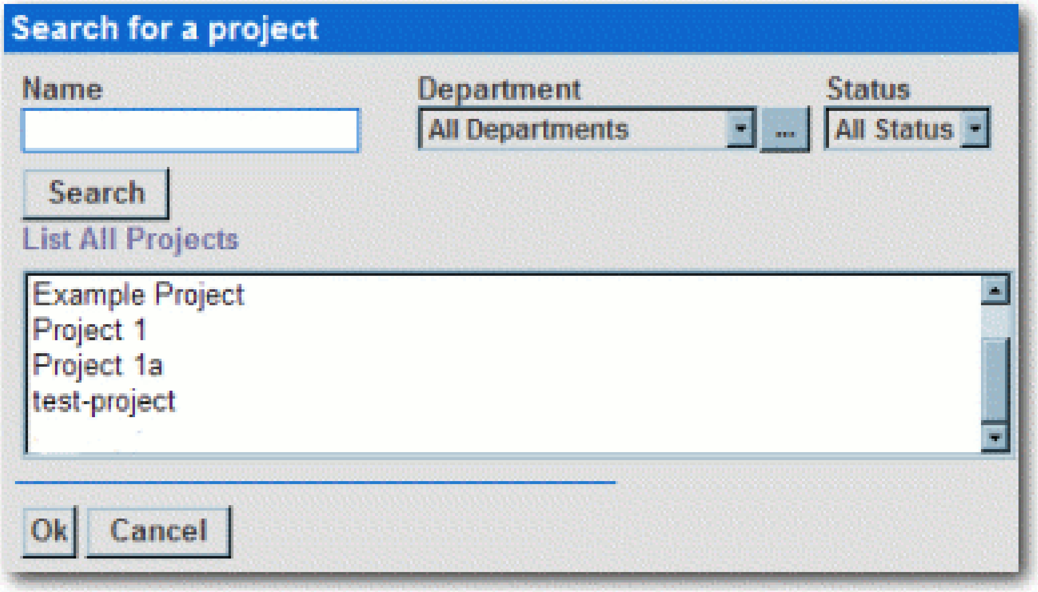
   The **Reassign** pop-up opens.



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

4. Click 

   The **Search for a Project** pop-up opens.

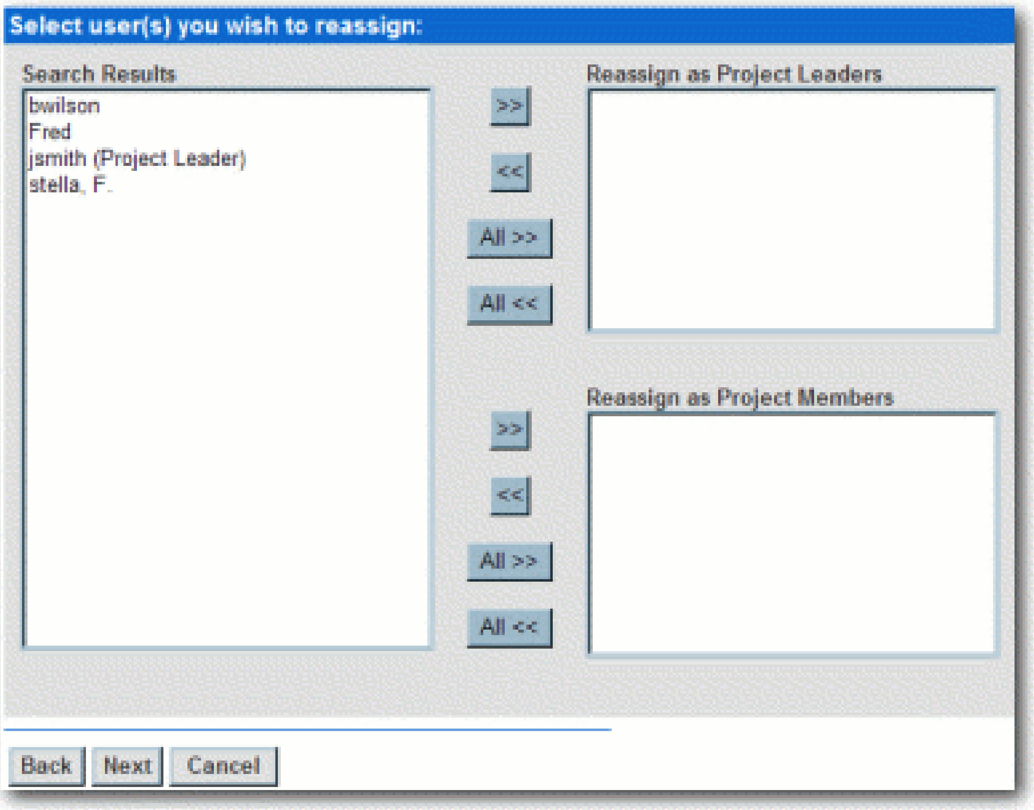


5. Use **Search** or **List All** to display a list of projects.

6. Select the project to which the users and/or usages are to be reassigned.

7. Click **Next**

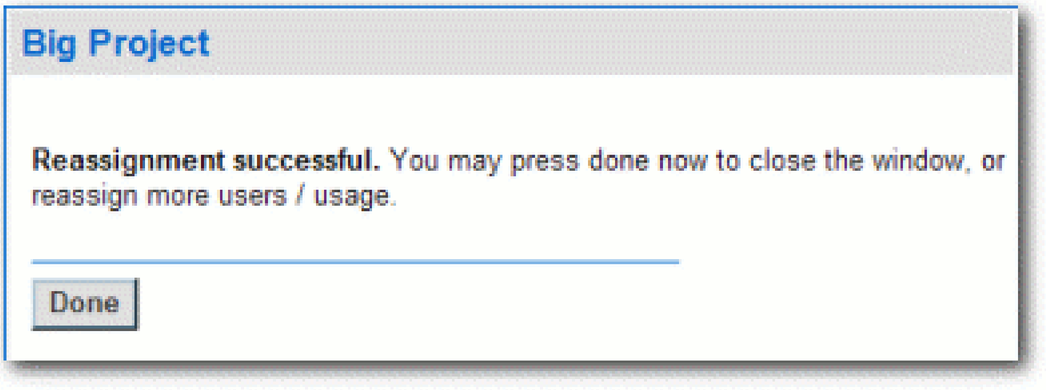
   The **Select users you wish to reassign** pop-up opens.



8. Use the **>>** and **<<** buttons to reassign users as **Project Leaders** and/or **Project Members**.

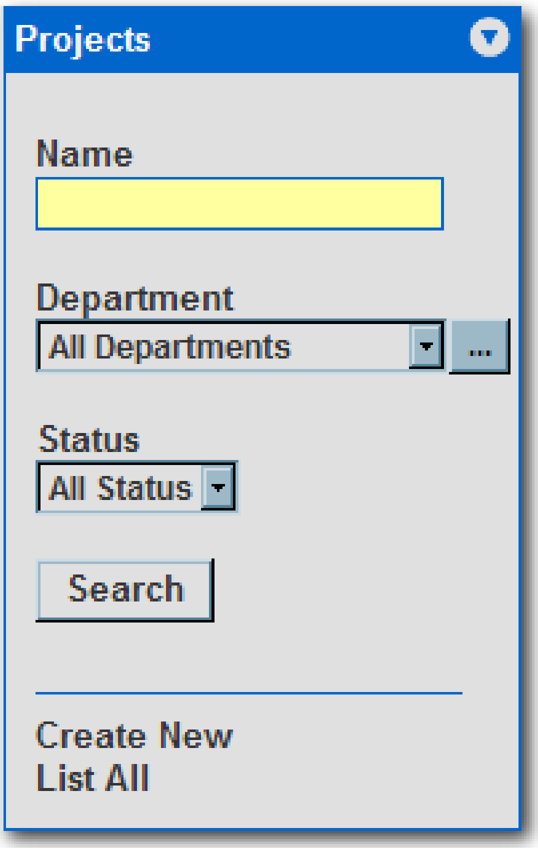
9. Click **Next**.

   A confirmation message appears.



10. Click **Done**

Locate a Project

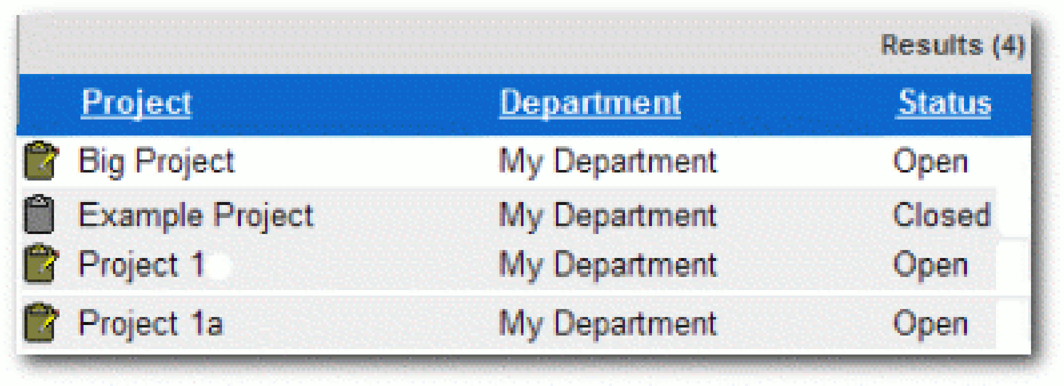


1. Enter a keyword or search term in the **Name** text box.

2. Use the **Department** and **Status** drop-downs as necessary to filter the search.

3. Click the **Search** button.

   Search results are listed in the main pane.



Closing a Project

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

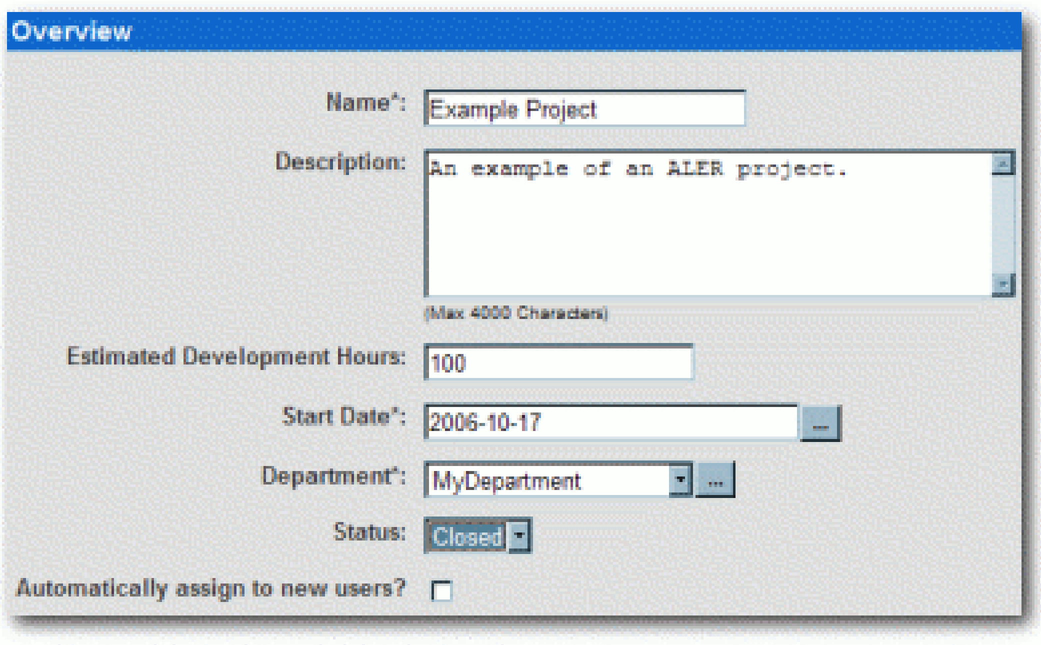
1. Select the project to be closed.

   The project detail is displayed in the bottom frame.

2. Click 

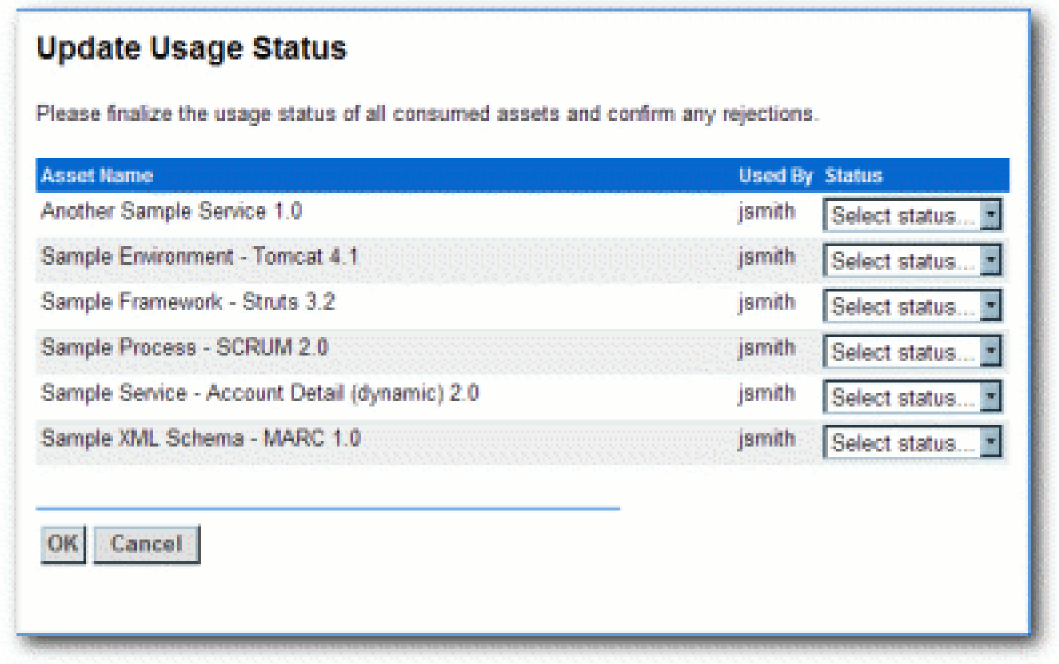
   The **Edit Project** pop-up opens.

3. Select **Closed** from the **Status** drop-down menu in the **Overview** section of the **Edit Project** pop-up..



4. Click **Save**.

   If the project has consumed assets, the **Update Usage Status** pop-up will appear. The consumed assets are listed in this pop-up, each with a Status drop-down.



5. Update the status of each consumed asset as necessary.

   IMPORTANT: Depending on the specific role and permissions assigned to the project leader, certain assets consumed by the project will not appear in the list. If this is the case, an **ATTENTION** message will appear in the **Update Usage Status** pop-up. **Be advised:** Only the project members listed below the **ATTENTION** message can reject the asset. Otherwise, clicking **OK** in the **Update Usage Status** pop-up will set the status of any hidden assets to **Deployed.**

6. When the **Update Usage Status** pop-closes the view returns to the **Edit Project** pop-up.

7. Click **Save**.

   The project is closed.

Project Relationships

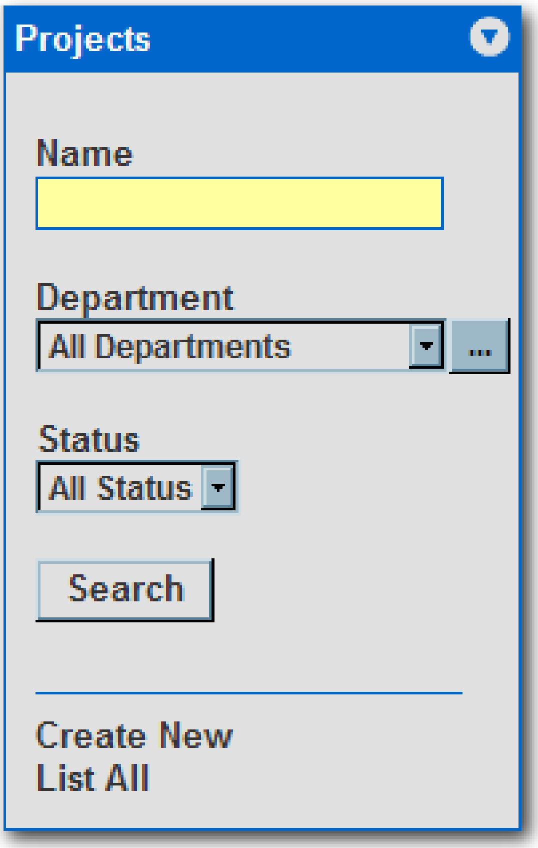
Overview

The **Project Relationships** feature provides the means to map the relationships between projects on a parent/child basis.

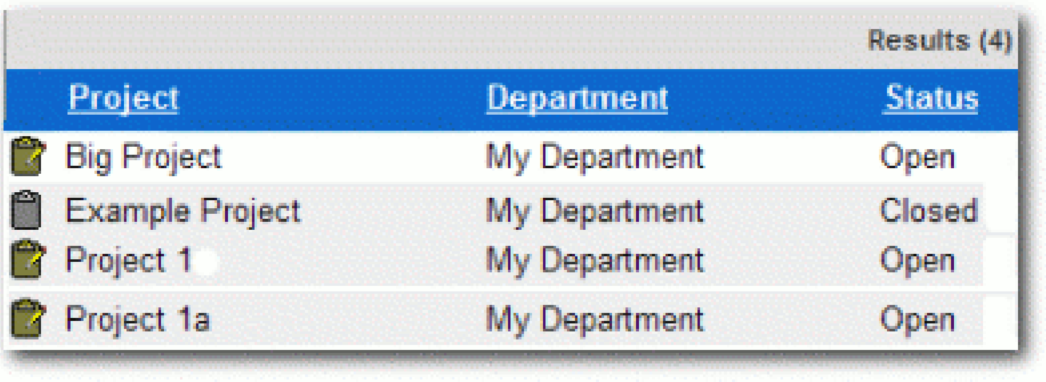
Adding a Relationship to a Project

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

1. Click **List All** in the **Projects** section.

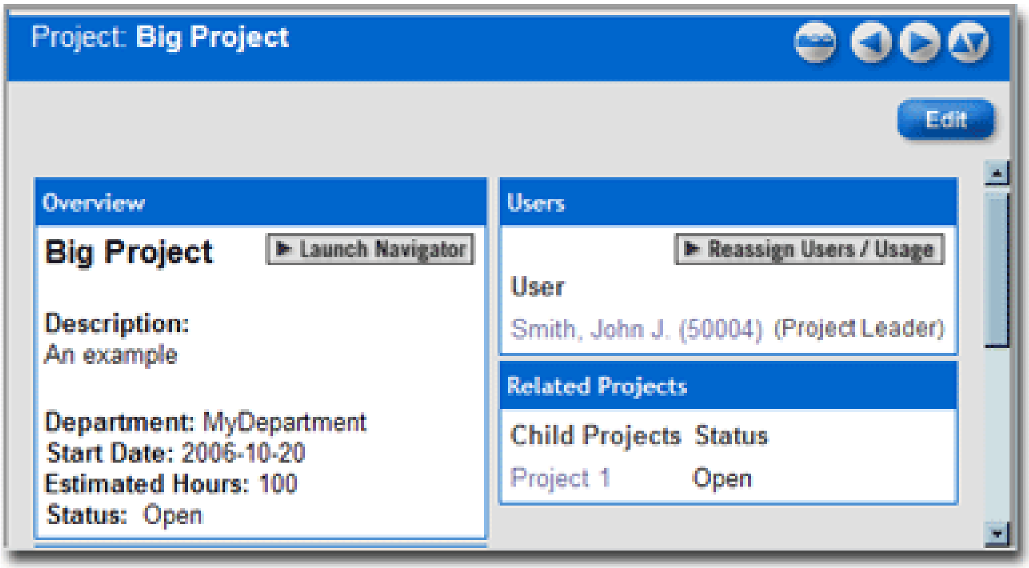


A list of projects appears in the top section of the main pane.



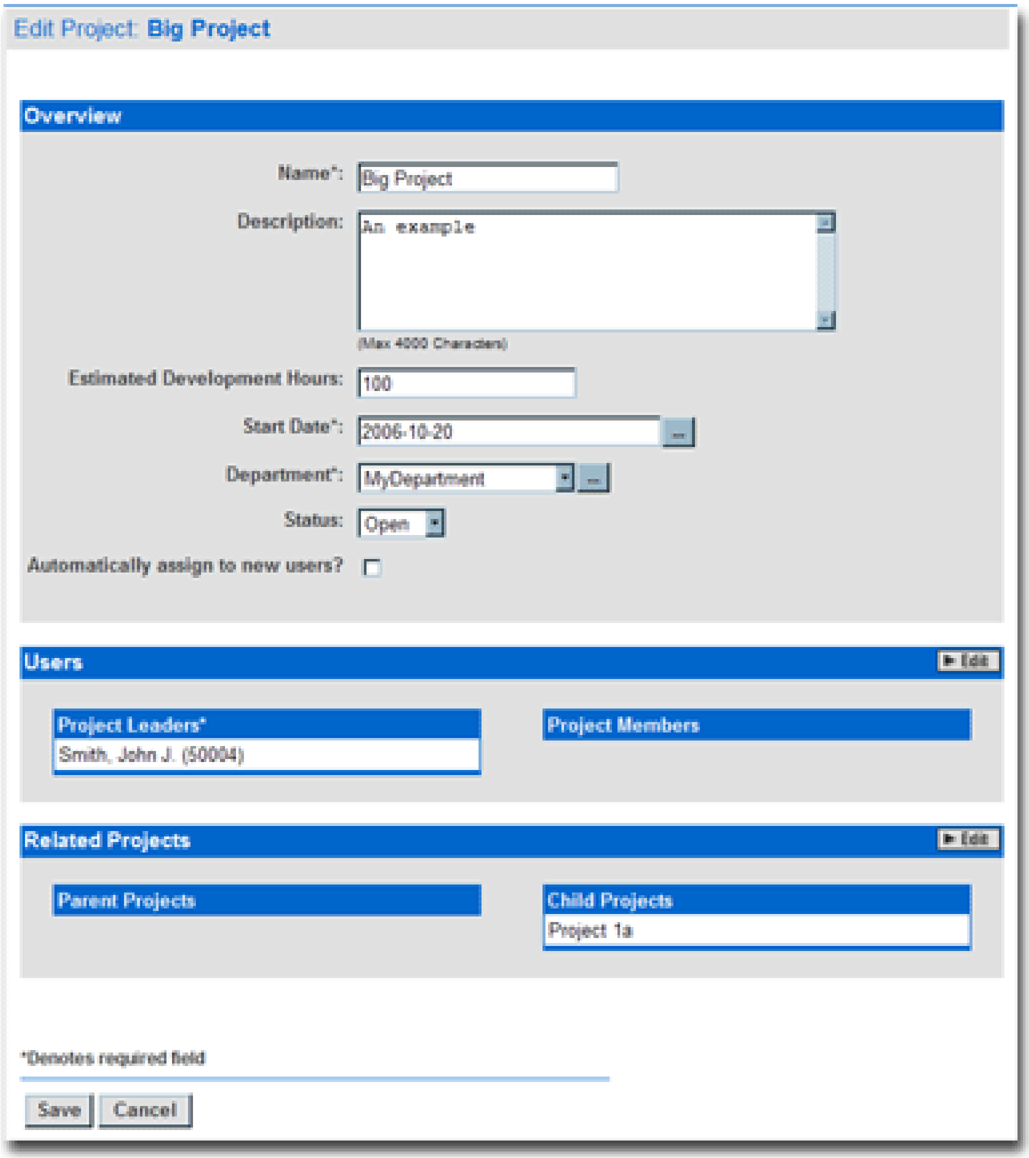
2. Select the project to be edited.

   The **Project Detail** opens in the bottom section of the main pane.



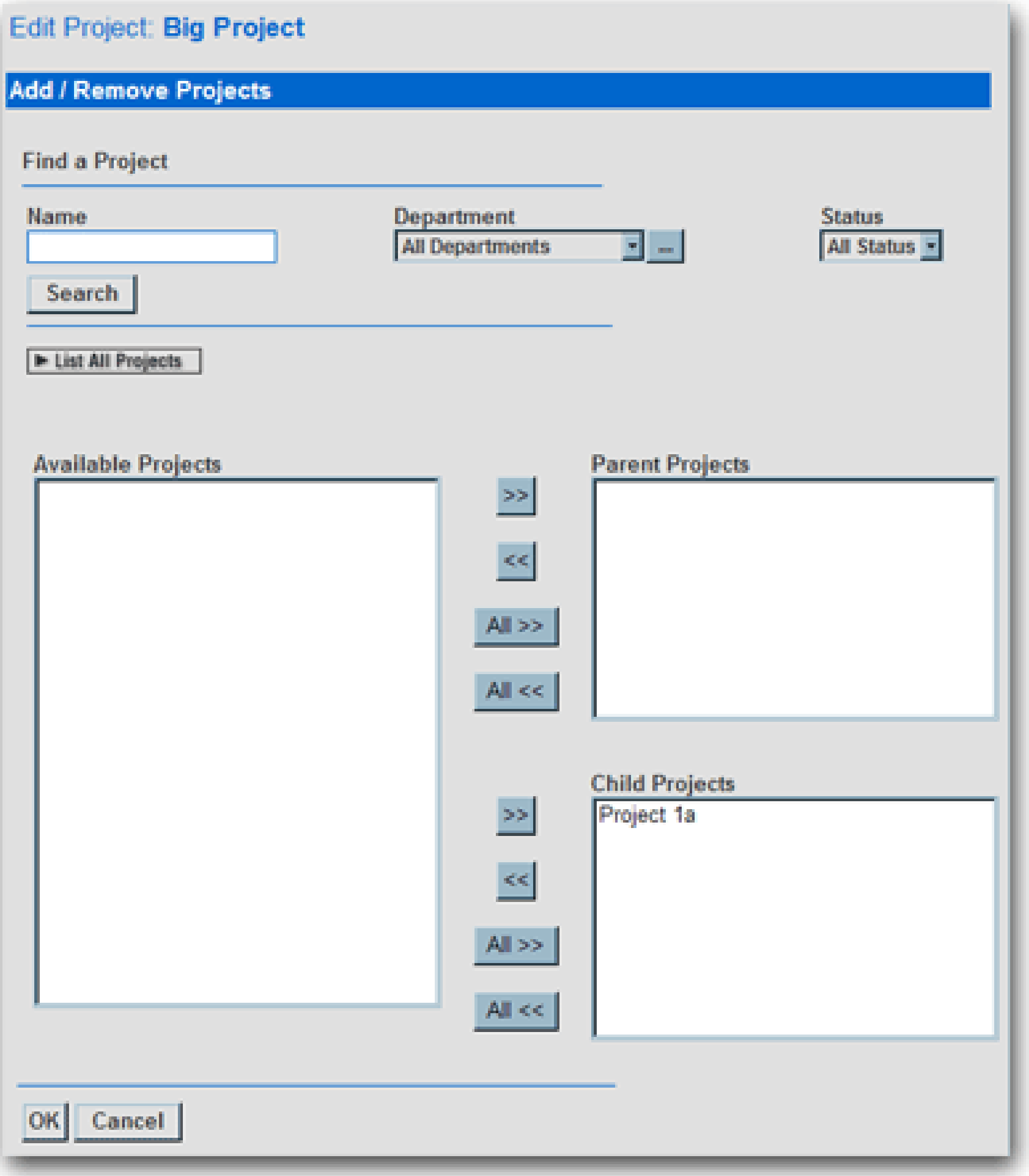
3. Click **Edit** in the **Project Detail**.

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



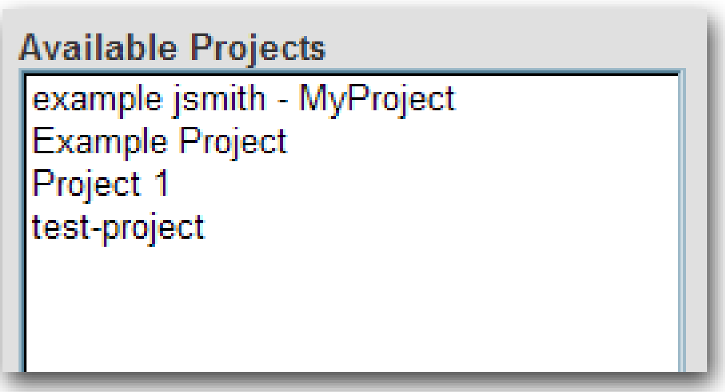
4. Click the **Edit** button in the **Related Projects** section of the **Edit Projects** pop-up.

   The **Add/Remove Projects** pop-up opens.



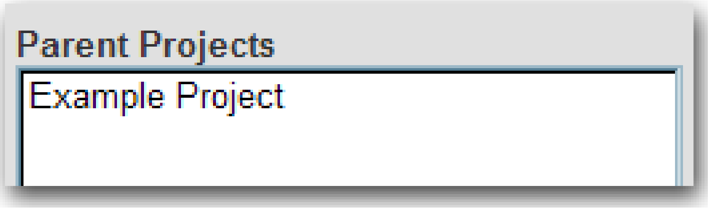
5. Click the **List All Projects** button.

   A list appears in the **Available Projects** window.



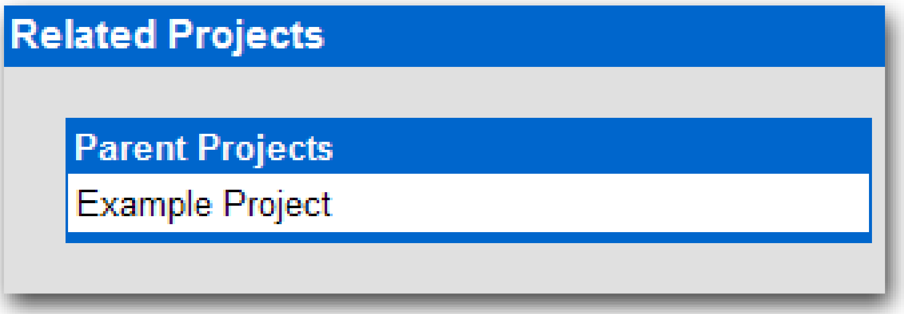
6. Select the project to be added and use the >> button to move it to either the **Parent Projects** or the **Child Projects** category window, as appropriate.

   The project appears in the selected window.



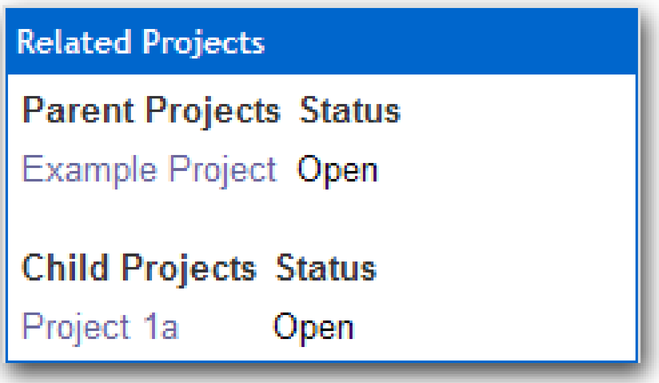
7. Click **OK** to close the **Add/Remove Projects** pop-up.

   The new project relationship appears in the appropriate list in the **Related Projects** section of the **Edit Project** pop-up.



8. Click **OK** to close the **Edit Project** pop-up.

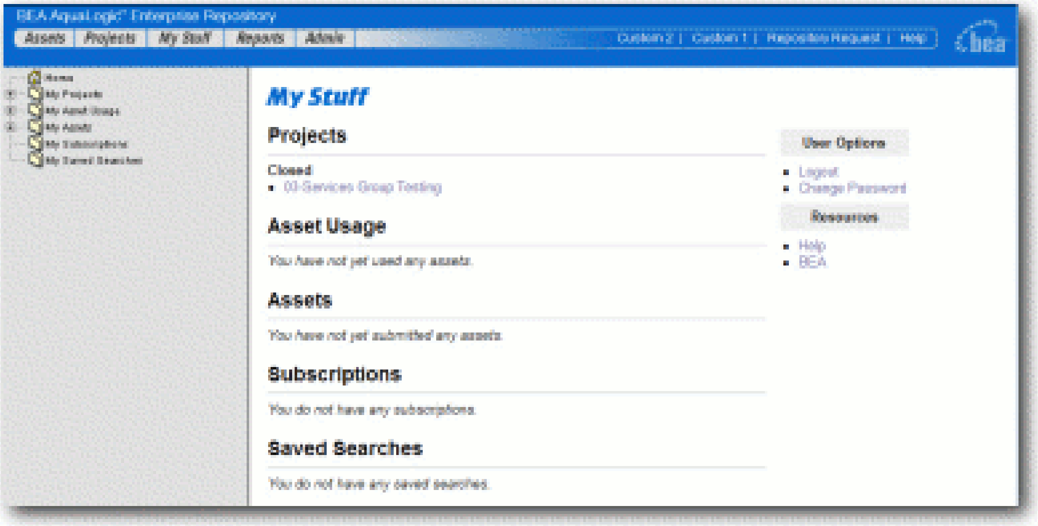
   The new project relationship appears in the **Related Projects** section of the **Asset Detail**.



Project relationship are also diplayed in the **Navigator**.

My Stuff

My Stuff provides each user with a personalized BEA AquaLogic Enterprise Repository homepage.



The **My Stuff** screen is comprised of several elements, as described below.

Projects

Lists **Closed** and **Open** projects to which the user is assigned.

- Click any listed project to view its detail.

Asset Usage

Lists **In Process** and **Rejected** assets and the project to which that asset is/was associated.

- Click any listed asset to:
  - Update the asset's usage status
    - See **Consumer Survey of Asset Value**

- Submit an asset review
  - See **Reviewing Assets**
- View an asset overview (the asset detail)

Assets

Lists assets according to **Registration** status. (See the **Registrar Guide**.)

Click any listed asset to view the asset detail.

- **Submitted**
  - Pending Review
  - Under Review
- **Registered**

Subscriptions

Lists all asset subscriptions. (See **Asset Subscriptions**.)

Click any listed asset to view the asset detail.

Delete an Asset Subscription

1. Use the checkbox to select the asset to be deleted.

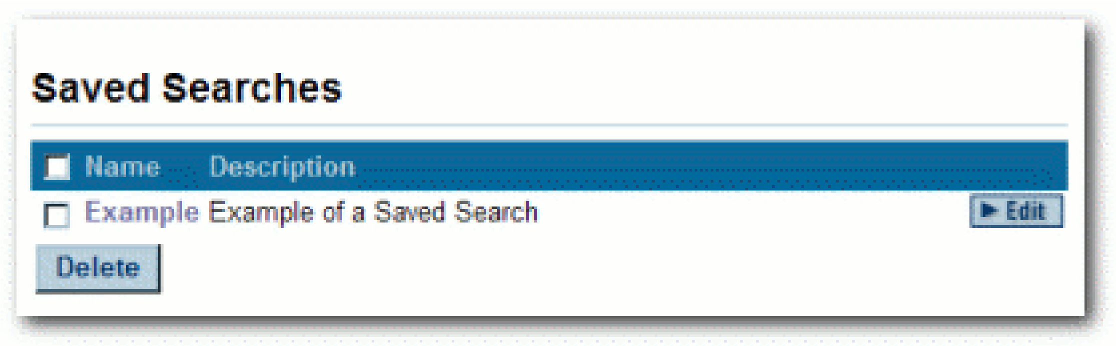
2. Click **Delete**.

   The subscription is cancelled and removed from the list.

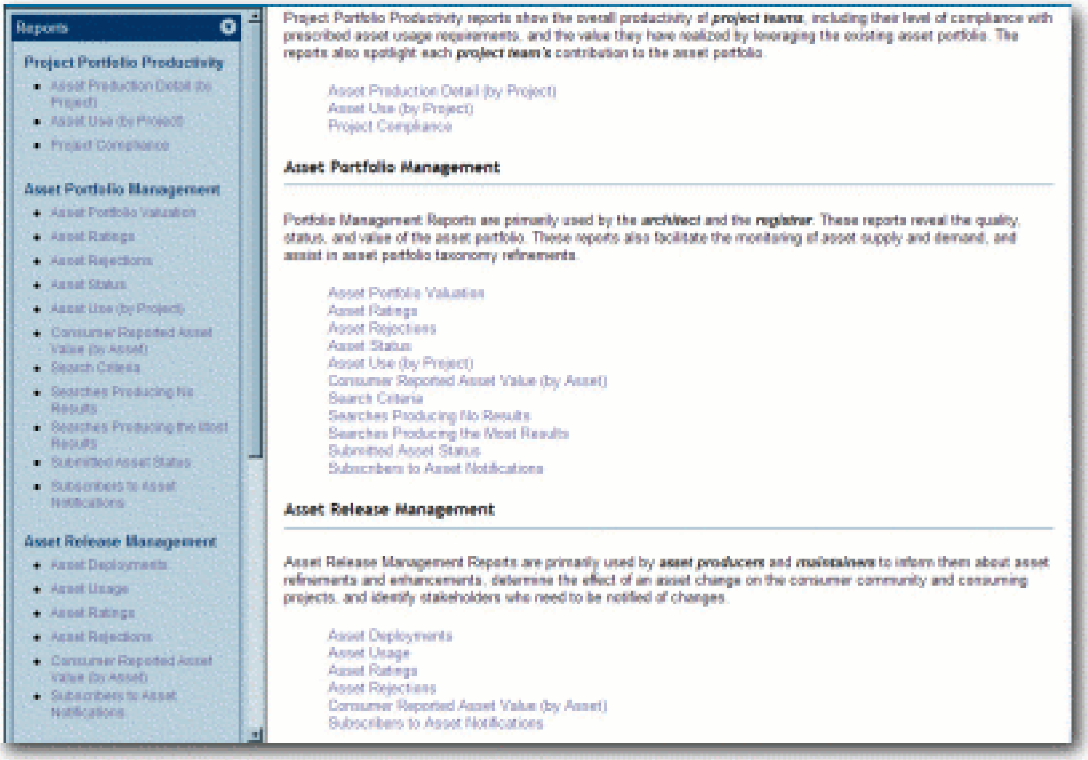
Saved Searches

Lists all saved searches. (See **Saving Searches**.)

Click any listed search to display the search results.



Reports



Report Types

Project Portfolio Productivity Reports

Project Portfolio Productivity reports show the overall productivity of project teams, including their level of compliance with prescribed asset usage requirements, and the value they have realized by leveraging the existing asset portfolio. The reports also spotlight each project team's contribution to the asset portfolio. Project portfolio productivity reports include:

- **Asset Production Detail by Project** (requires asset production tracking feature to be enabled)
  - Shows the individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging

standards in a portfolio. Managers can also use this report to quantify the value produced for clients.

- **Asset Use (by Project)**
  - Shows individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.

- **Project Compliance** (assumes use of Compliance Templates)
  - Shows the Compliance Templates applied to projects and whether the project is in compliance with the template.

Asset Portfolio Management Reports

Used primarily by architects and registrars, these reports show the quality, status, and value of the asset portfolio. These reports also monitor asset supply and demand, as well as assisting with asset portfolio taxonomy refinements. The reports included with this group of include:

- **Asset Portfolio Valuation**
  - Shows the number of assets used, how frequently each asset was used and the total savings in reuse time. Architects and registrars may use the report to find the most valuable and valued assets.

- **Asset Ratings**
  - Shows consumer ratings for assets. Architects and registrars may use the report to chart the perceived value of assets, while producers and maintainers can use the report as a feedback mechanism.

- **Asset Rejections**
  - Shows the reasons why an asset was rejected for use in a project. Architects and registrars may use this report to gauge the level of demand for specific assets, while producers and maintainers can use the report as a feedback mechanism.

- **Asset Status**
  - Shows the asset name, type and status (active, inactive, and so on). Registrars may use this report to determine the level of asset lifecycle maintenance

required for the asset portfolio.

- **Asset Use (by Project)**
  - Shows individual assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.

- **Consumer Reported Asset Value (by Asset)**
  - Shows the consumer reported savings associated with an asset, along with the predicted value of the assets. Managers may use this report to refine the numbers used to calculate predicted net hours. Architects and registrars may use this report to identify the most used and valuable assets in the registry. Producers and maintainers my use this report to determine actual asset value as realized by consumers, as well as identifying ongoing changes and enhancements to assets in the registry.

- **Search Criteria**
  - Shows the number of results of each search parameter. Architects and registrars may use this report to define taxonomies.

- **Searches Producing No Results**
  - Shows the search parameters in a search that produced no results. Ultimately, the report shows areas of unmet demand in the registry. Registrars and architects may use this report to refine taxonomies.

- **Searches Producing the Most Results**
  - Shows the search parameters in searches that returned the most results. This report may be used by architects and registrars to determine if users are finding required information in the registry. The report may also be used to refine taxonomies.

- **Submitted Asset Status**
  - Indicates asset status in the approval cycle. Registrars may use this report to determine scheduling for assets requiring work.

- **Subscribers to Asset Notifications**
  - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

Asset Release Management Reports

Used primarily by asset producers and maintainers, these reports inform these users about asset refinements and enhancements, determine the effect of an asset change to the consumer community and consuming projects. In addition, these reports identify stakeholders who need to be notified about changes. Asset release management reports include:

- **Asset Deployments**
  - Shows the names of deployed assets and the projects with which they are associated. Used by producers, maintainers, and project leads to assess the effect of change to an asset.
- **Asset Usages**
  - Lists the assets selected for use in specific projects. Used by producers, maintainers, and project leads to assess the potential impact of changes to an asset
- **Asset Ratings**
  - Shows consumer ratings for assets. Architects and registrars may use the report to chart the perceived value of assets, while producers and maintainers can use the report as a feedback mechanism.
- **Asset Rejections**
  - Lists the reasons an asset was rejected for use in a project. Architects and registrars may use this report to gauge the level of demand for specific assets, while producers and maintainers can use the report as a feedback mechanism.
- **Consumer Reported Asset Value (by Asset)**
  - Indicates the consumer reported savings associated with an asset, along with the predicted value of the assets. Managers may use this report to refine the numbers used to calculate predicted net hours. Architects and registrars may use this report to identify the most used and valuable assets in the registry. Producers and maintainers my use this report to determine actual asset value as realized by consumers, as well as identifying ongoing changes and enhancements to assets in the registry.
- **Subscribers to Asset Notifications**
  - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

Performance Reports

These reports allow individual users to quantify the value of their contributions to the organization. They also inform department heads about the performance of the producers, consumers, and project leads in their organizations. The performance reports presently included in BEA AquaLogic Enterprise Repository include:

- **Asset Use by Project Within a Department**
  - Shows the amount of asset use in each project within a department. The report shows the consumer name, project, asset type, and other groups of information used to identify departments that reuse assets. This report may be used by management to reward asset reuse by groups and individuals.

- **Asset Use (by project)**
  - Shows the assets used in a project, as well as the hours saved by using the asset. Managers can use this report to reward groups or individuals for reusing assets; architects and registrars can use the report to spot emerging standards in a portfolio. Managers can also use this report, with project leads, to quantify value produced for clients.

Program Management Reports

Used primarily by various managers, these reports expose the value that the program brings to the organization (ROI) and indicates whether the program successfully meets goals, demonstrates program growth and progress and serves as the basis for incentives and governance. The program management reports include:

- **Active and Unapproved User Login**
  - Shows the names of active and unapproved users and the number of times that they logged in. The system administrator or security administrator may use this report to reallocate registry licenses.

- **Active and Unapproved Users with Zero Logins**
  - Shows the names of active and unapproved users who have never logged in. The system administrator or security administrator may use this report to reallocate registry licenses.

- **Asset Portfolio Valuation**

    - Shows the number of assets used, how frequently each asset was used and the total savings in reuse time. Architects and registrars may use the report to find the most valuable and valued assets.

- **Asset Use by Project Within a Department**
    - Shows the amount of asset use in each project within a department. The report shows the consumer name, project, asset type, and other groups of information used to identify departments that reuse assets. This report may be used by management to reward asset reuse by groups and individuals.

- **Consumer Reported Asset Value (by Asset)**
    - Shows the consumer-reported savings associated with an asset, along with the predicted value of the assets. Managers may use this report to refine the numbers used to calculate predicted net hours. Architects and registrars may use this report to identify the most used and valuable assets in the registry. Producers and maintainers my use this report to determine actual asset value as realized by consumers, as well as identifying ongoing changes and enhancements to assets in the registry.

- **Password Event Log**
    - Shows the password changes made for users. The report may be used by security administrators or system administrators to identify security breaches.

- **Submission Status (by Producer)**
    - Shows the names of producers, the number of assets submitted and registered, number of use instances, and the estimated time saved by asset consumers.

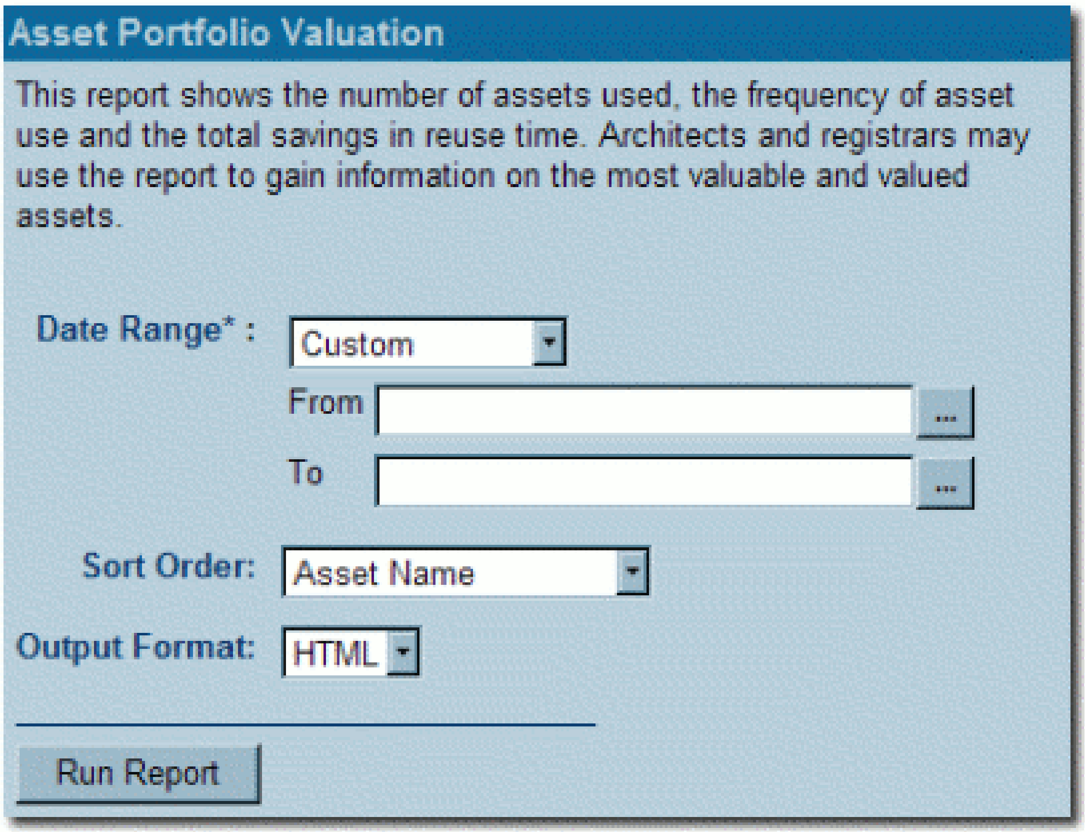
- **Subscribers to Asset Notifications**
    - Shows specific subscribers to asset information. This report may be used by architects and registrars to determine the level of demand on assets in the portfolio.

Running a Report

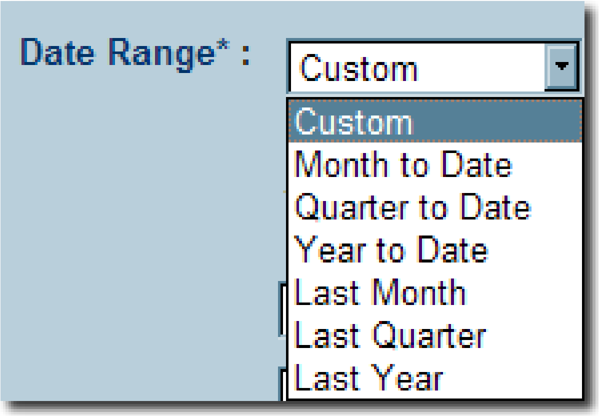
This procedure is performed on the BEA AquaLogic Enterprise Repository **Reports** screen.

1. Select the report from the list in the sidebar.

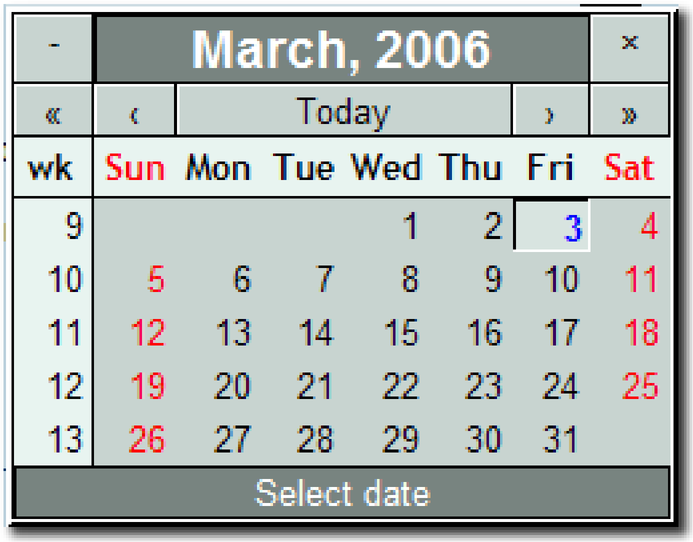
The report form opens in the main pane.



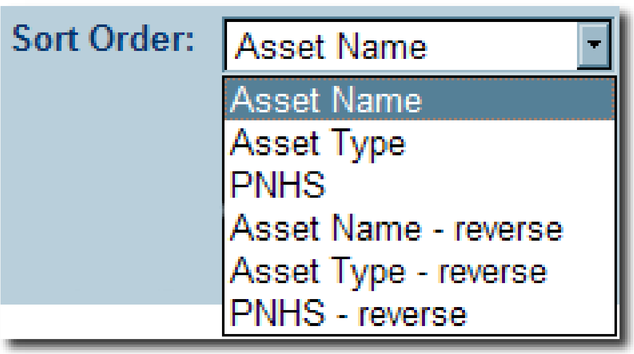
2. Select the appropriate **Date Range** in the drop-down.



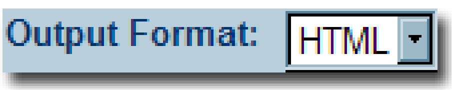
3. If necessary, click  to launch the calendar to select **From** and **To** dates.



4. Select the **Sort Order**. (Note: sort order selections vary according to the type of report.)



5. Select the **Output Format**



Note: HTML formatting errors may occur when the amount of data in a report exceeds the capacity of the reporting engine to properly render the HTML.

6. Click **Run Report**

The report is generated

Asset Portfolio Valuation

Use Date : 3/1/2006 - 3/3/2006
Sort : Asset Name

Asset Name	Asset Type	Predicted Net Hours Saved (PNHS)	# of Times Used	# of Times Rejected	# of Times In Use	In Use Total PNHS	# of Times Deployed	Deployed Total PNHS	Adoption % (Deployed / In Use)
MyAsset (1.0)	Component	0	2	0	2	0	0	0	0.00%
Sample Component J2EE - Order EJB (2.0)	Component	855	1	1	0	0	0	0	0.00%
Sample Project Profile - Purchase Request Tracking System (1.0)	Project Profile	0	1	0	1	0	0	0	0.00%
Training Asset (1.0)	Training	0	1	0	1	0	0	0	0.00%
	GRAND TOTALS :	855	5	1	4	0	0	0	0.00%

Number of Assets Returned : 4

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