BEA AquaLogic® Enterprise Repository

Registrar Guide

Version 3.0 RP1
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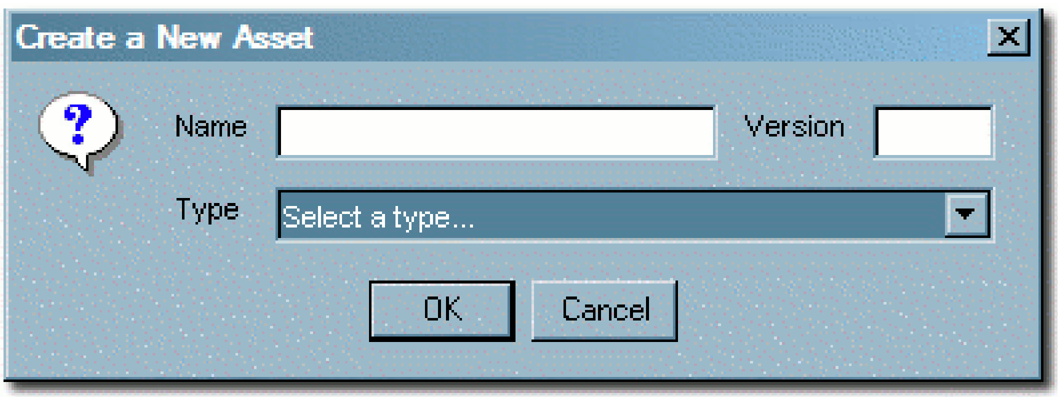
Advanced Asset Submission

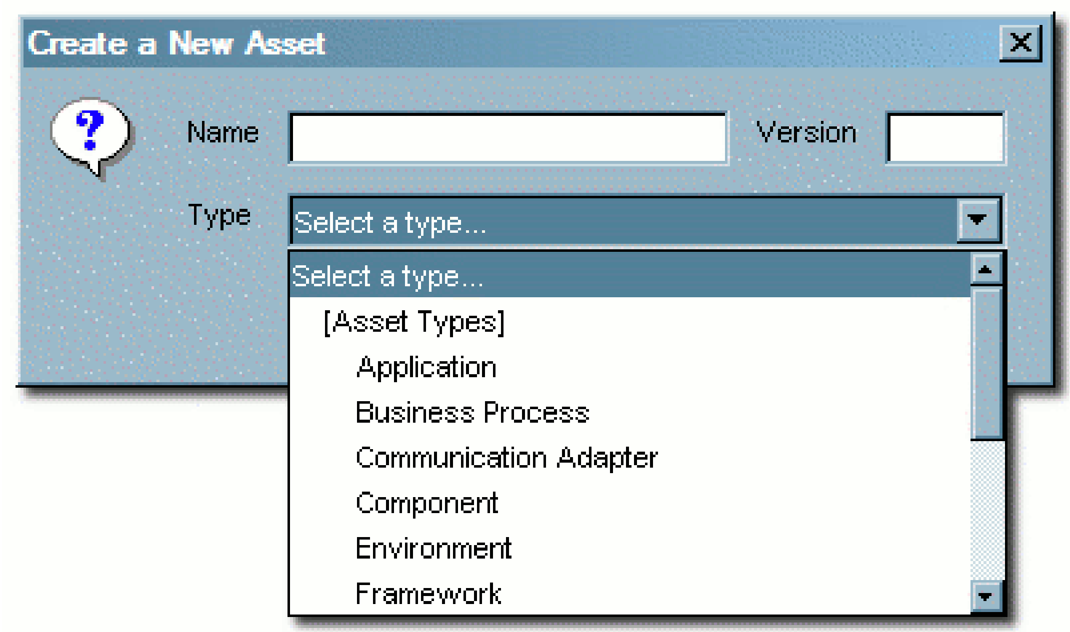
This procedure is performed in the **Asset Editor**. (Access to the **Asset Editor** is determined by the role to which the user is assigned.)

1. Open the **File** menu in the **Asset Editor** and select **New**

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

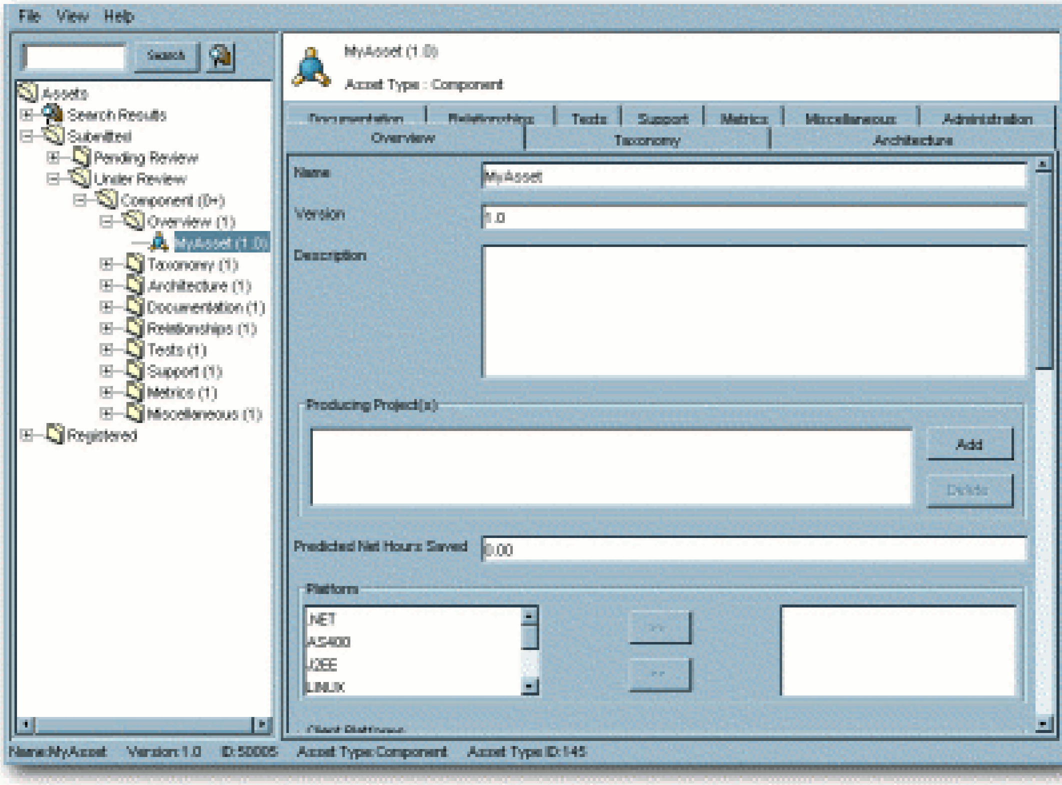


2. Enter the appropriate information in the **Name** and **Version** text boxes.
3. Select the appropriate **Type** template from the drop-down.



4. Click **OK**.

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



The asset is submitted for review and registration.

The Registration Process

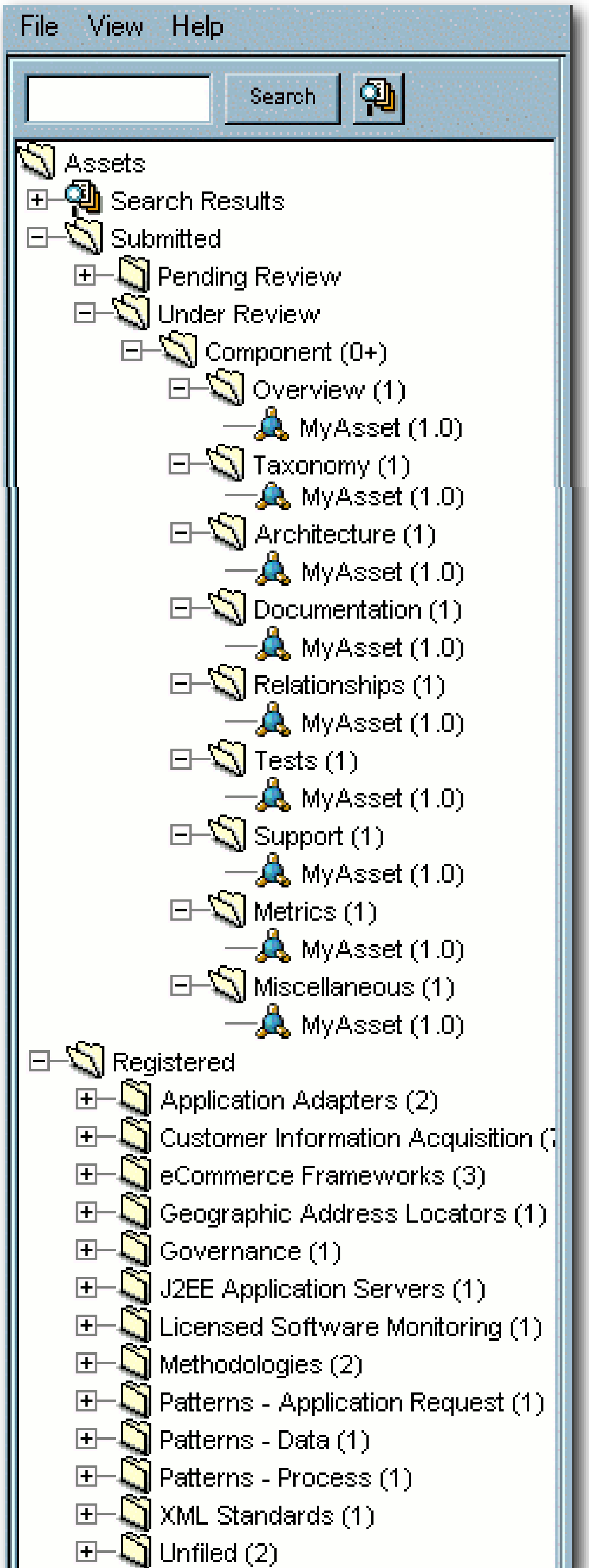
Overview

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**.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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.

Automated Asset Registration Using Advanced Registration Flows

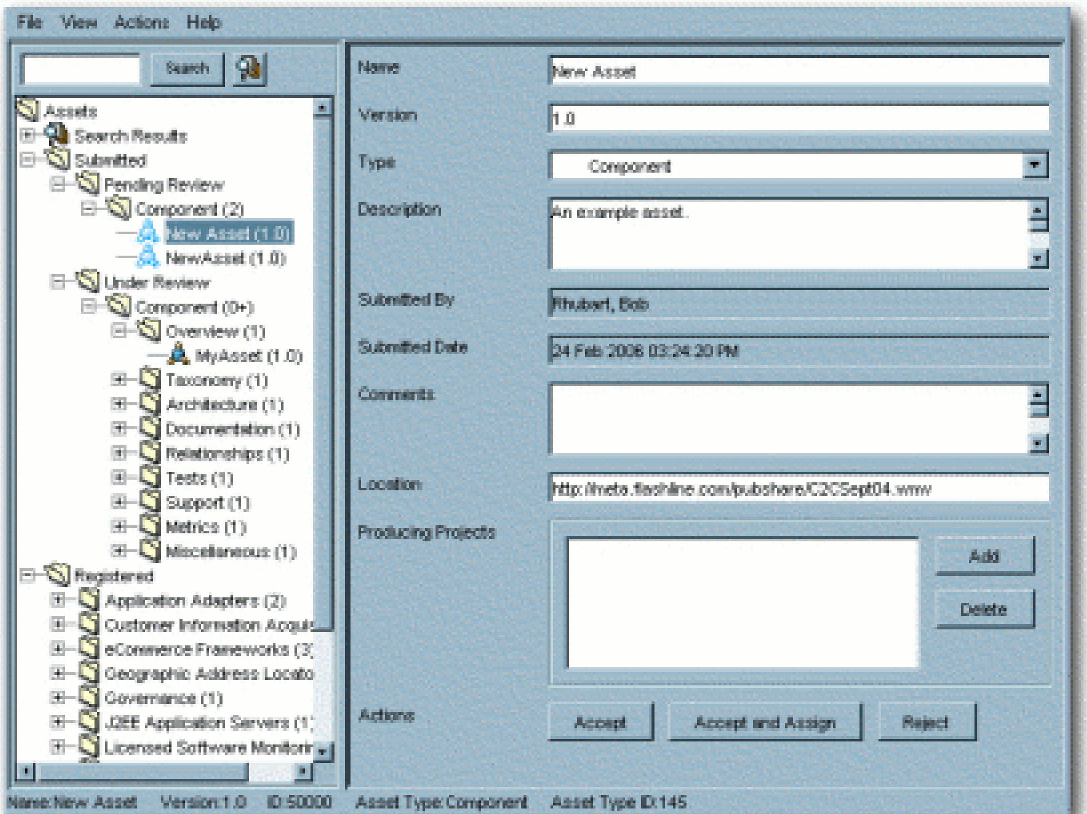
The ALER 3.0 Advanced Edition, bundles pre-built AquaLogic BPM asset registration flows that attempt to automate the registration and governance processes defined in **Understanding the Registration Process**. For ease of use, you can use the predefined ALPBM endpoint or create your own Web Service endpoints to subscribe to ALER events. There are also event monitoring and logging tools for troubleshooting and tuning purposes.

For more information about using the Advanced Registration Flows feature, see the ALER "Configuring and Managing Advanced Registration Flows" documentation.

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.



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**

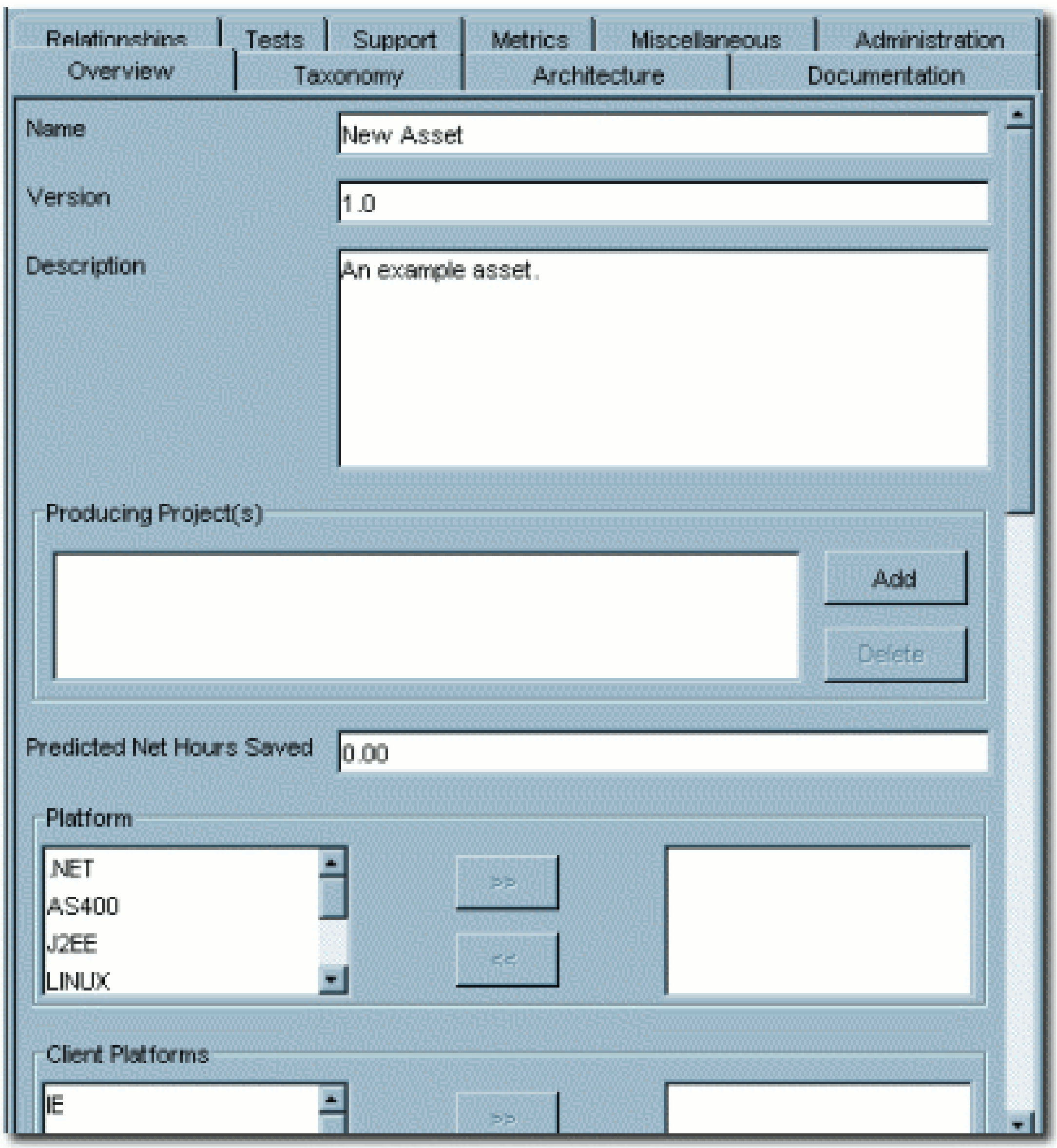
      The asset moves to the **Under Review** folder in the tree and is assigned to the selected user/users, who will provide the information required for each of the tabs in the **Asset Editor**. The assignees also may receive a notification e-mail that lets them know they are assigned to this asset.

Registering an Asset

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.

Overview Tab

1. Click the **Overview** tab.



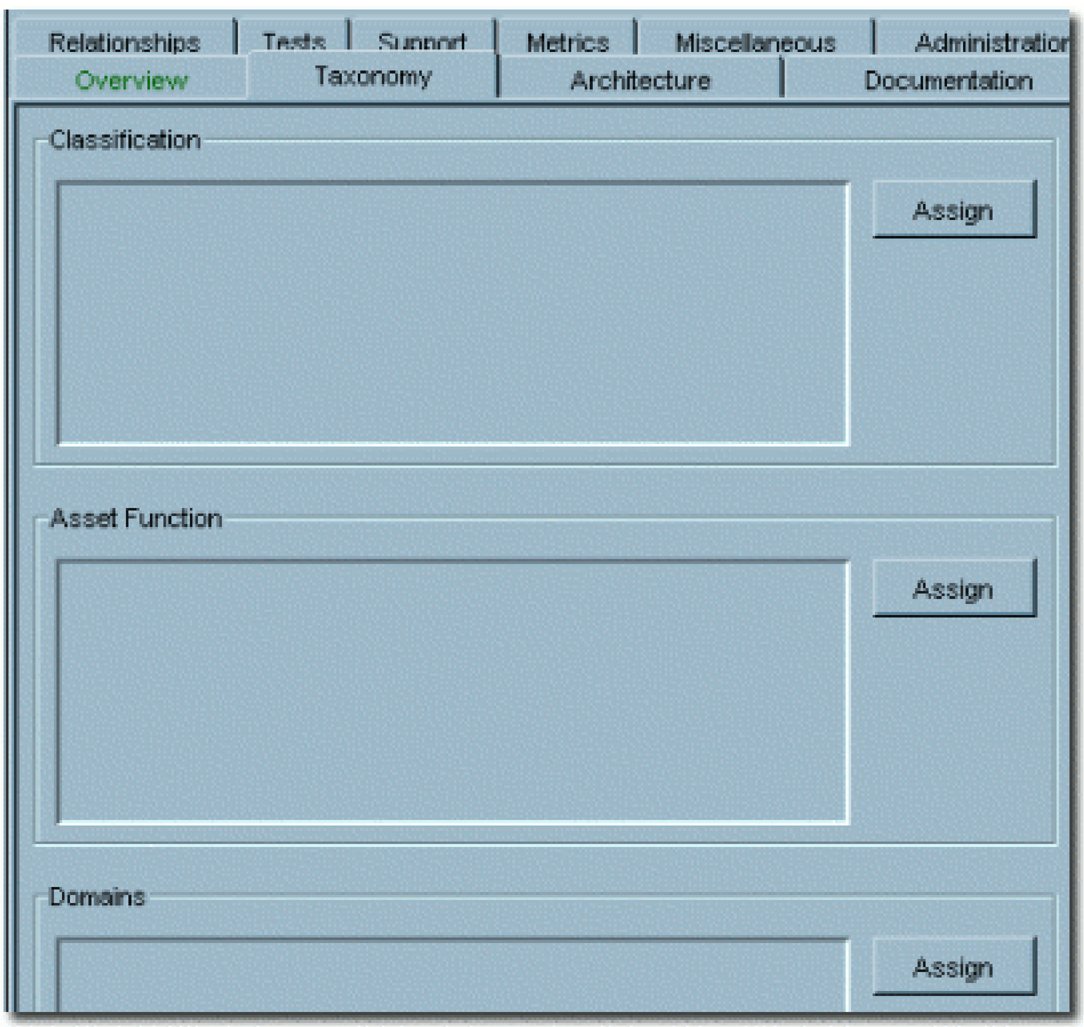
2. Enter the appropriate information in each of the fields.
3. Click **Approve**.

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

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

Taxonomy Tab

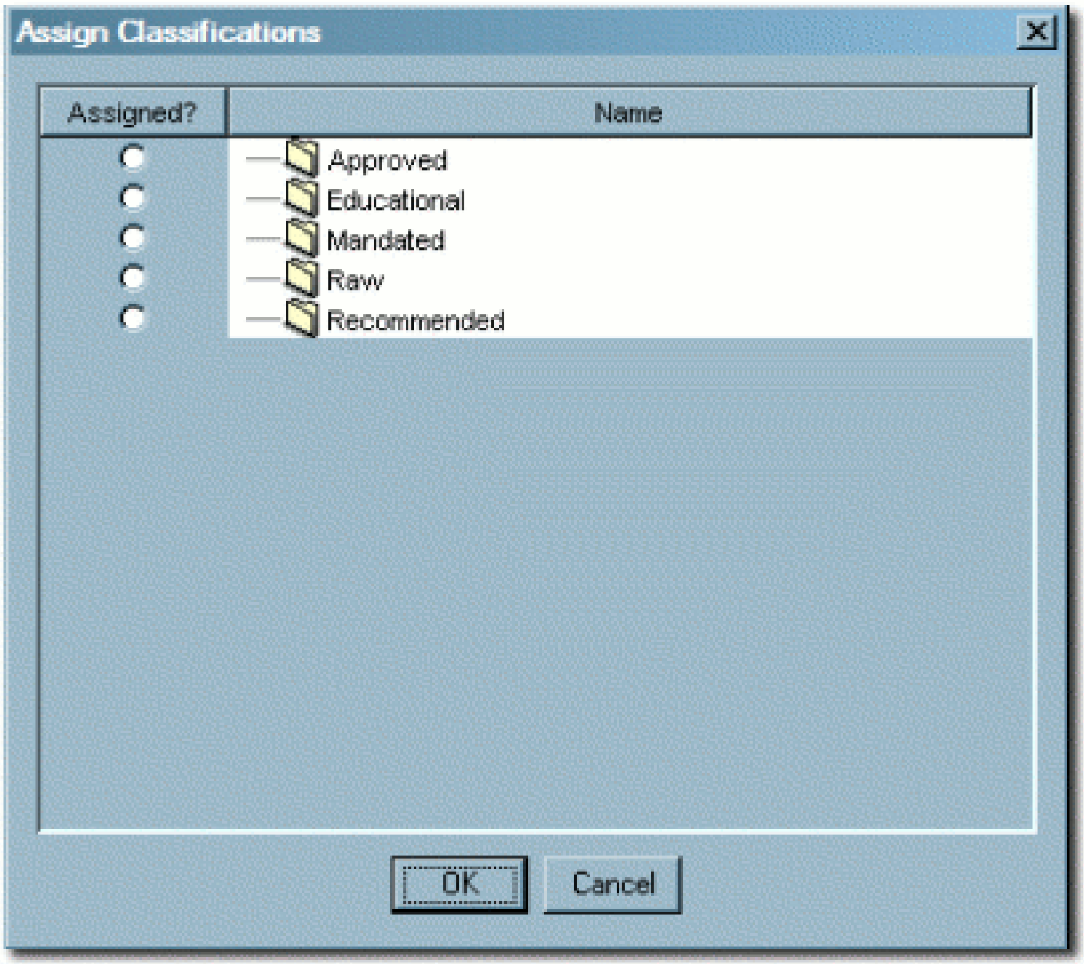
1. Click the **Taxonomy** tab.



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.

   - **Approved**
     - Approved by the Registrar for use in projects.
   - **Educational**
     - For educational/informational purposes only. Not approved for use in projects.
   - **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.).
   - **Raw**
     - No assurance of quality or completeness.
   - **Recommended**
     - Approved and successfully deployed in at least one project.

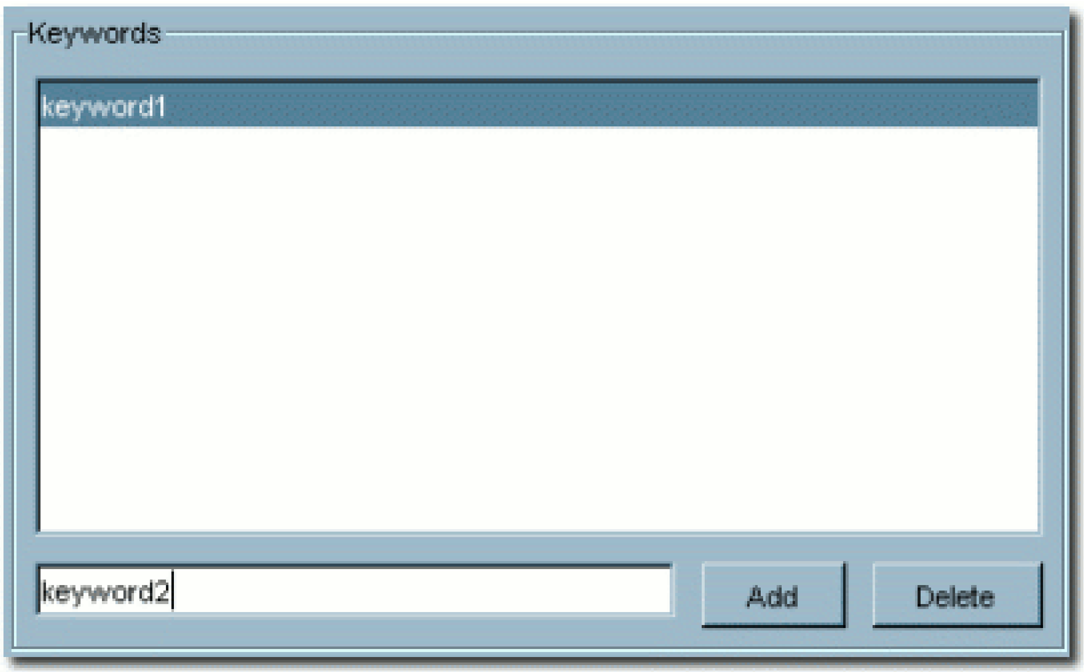
4. Click **OK**.

   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.



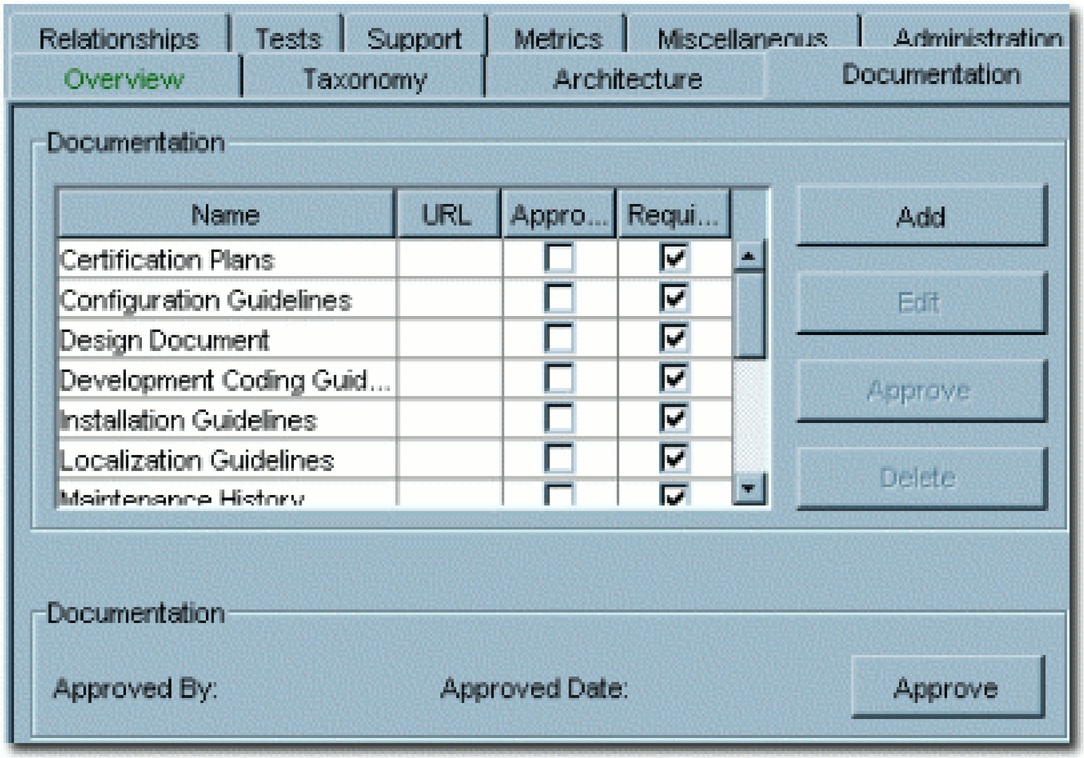
   Add other keywords as necessary.

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

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

Documentation Tab

1. Click the **Documentation** tab.

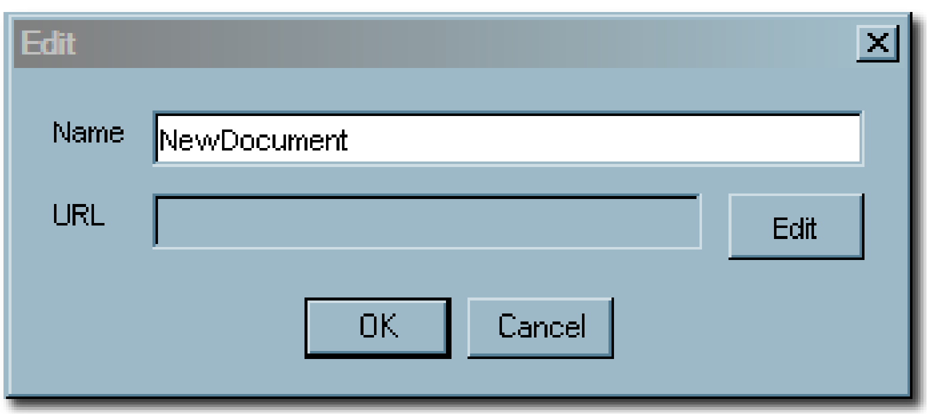


A number of suggested document titles are listed in the **Documentation** window. Appropriate documentation may be associated with each of these titles, and new documents may be added to the list.

To add a new document:

2. Click **Add**.

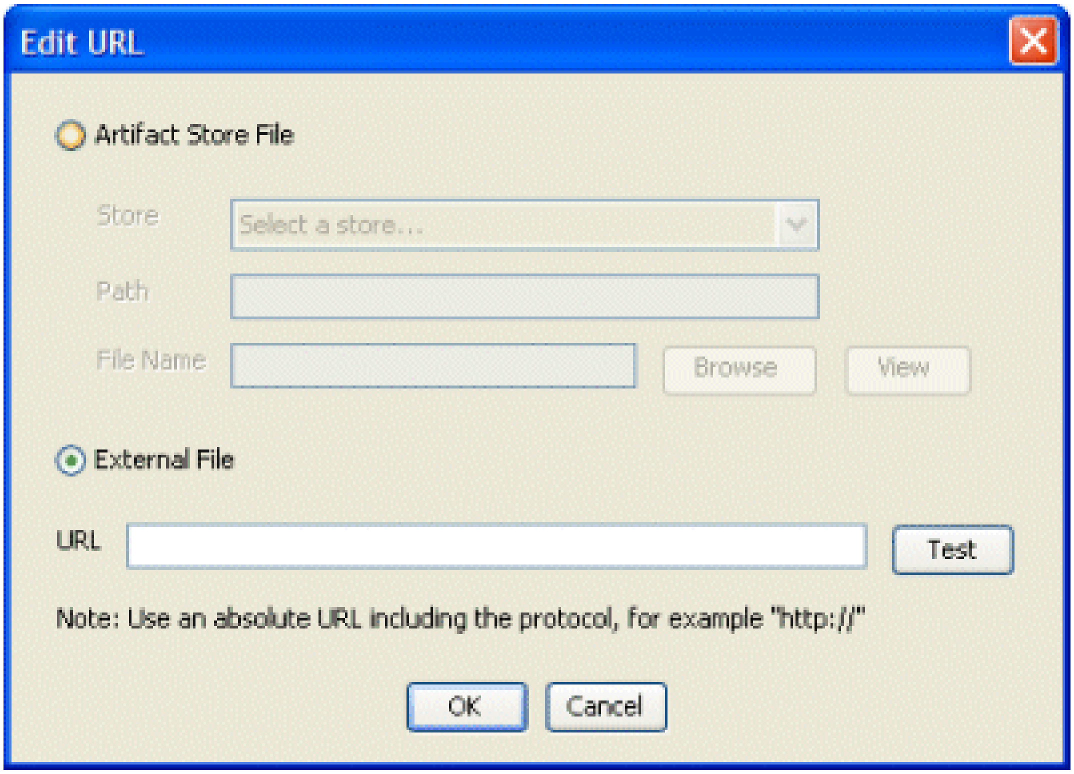
The **Edit** pop-up opens.



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.

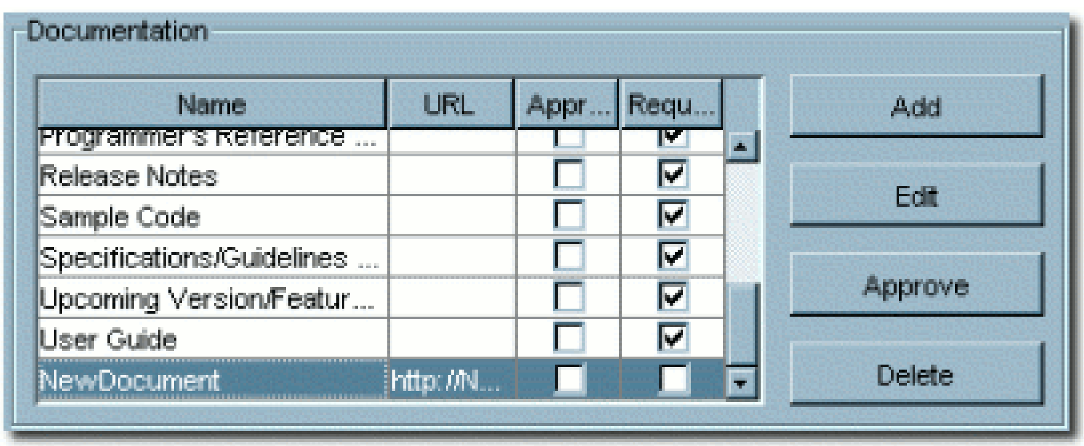


5. Select **Artifact Store File** or **External File**, as appropriate.

6. Enter all necessary information in the available text boxes.

7. Click **OK**.

   The new document appears in the list.

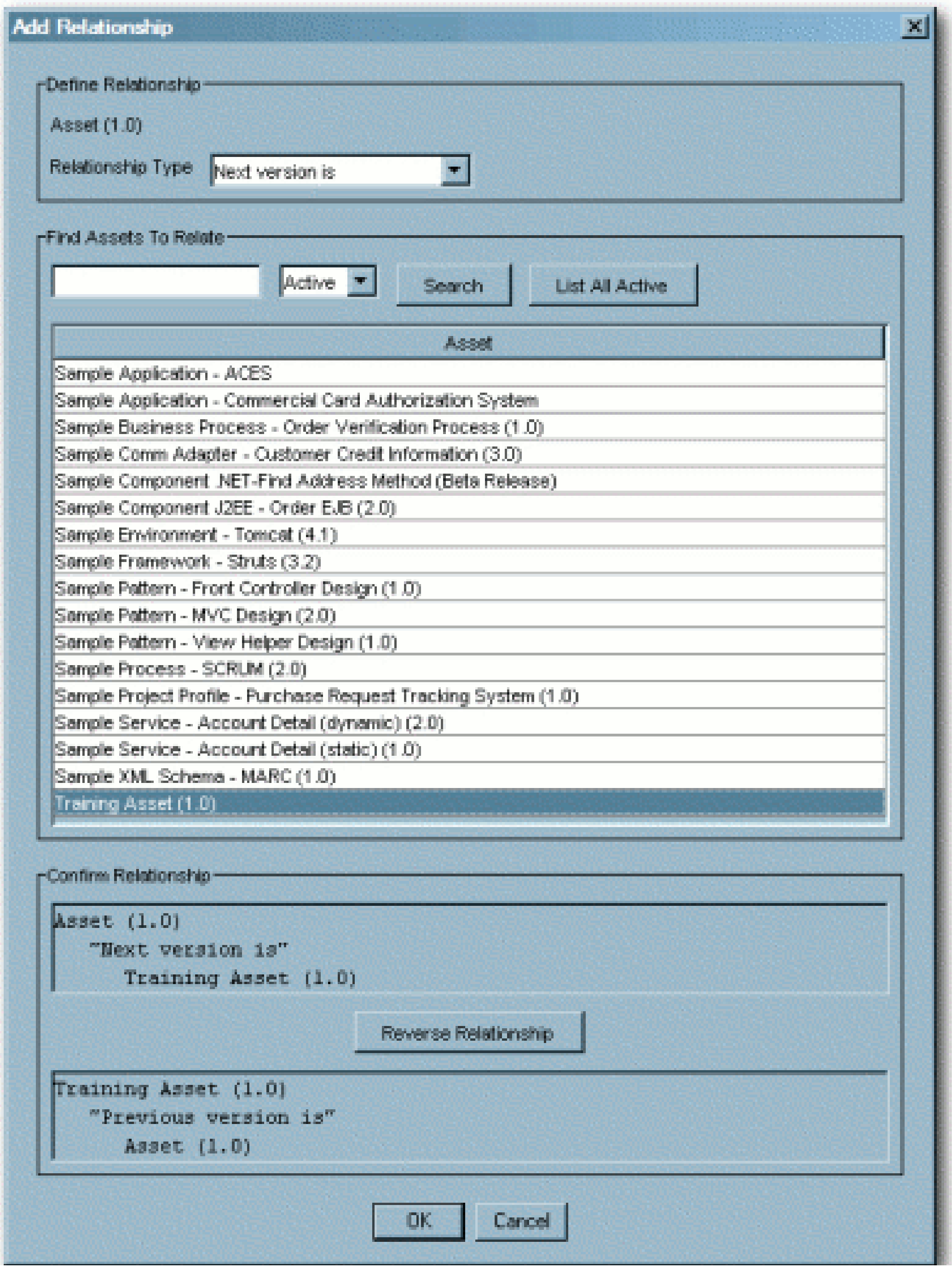


8. To edit file information for an existing document, select the document, click **Edit** and repeat Steps 4-7.

9. When finished, click **Approve**.

Relationships Tab

1. Click the **Relationships** tab.
2. Click the **Add** button.



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 the **Reverse Relationship** button to reverse the relationship.

6. Click **OK** when finished.

7. Repeat as necessary to add other asset relationships.

8. When finished, click **Approve**.

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

Completing the Tab Approval Process

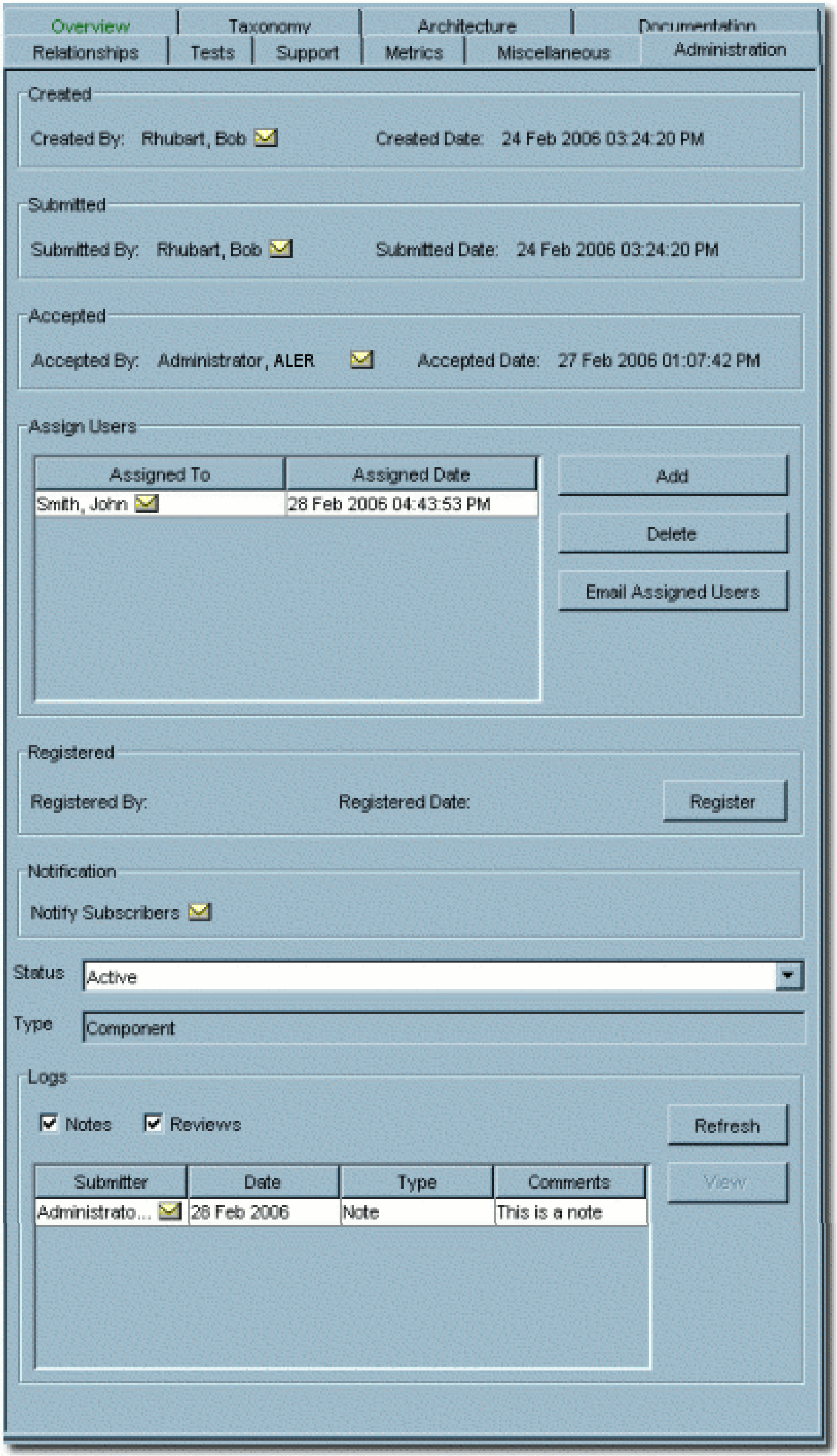
While certain tabs are common to all asset types, the specific **Asset Editor** tabs for any asset are determined by the configuration of the Type template to which the asset is assigned on submission. Similarly, the metadata elements that appear on any tab are also determined by the Type configuration. 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. Each time a user clicks **Approve** on a tab, they will be prompted to save their changes.

Administration Tab

Every asset in ALER 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.



A registered asset can include unapproved tabs.

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:

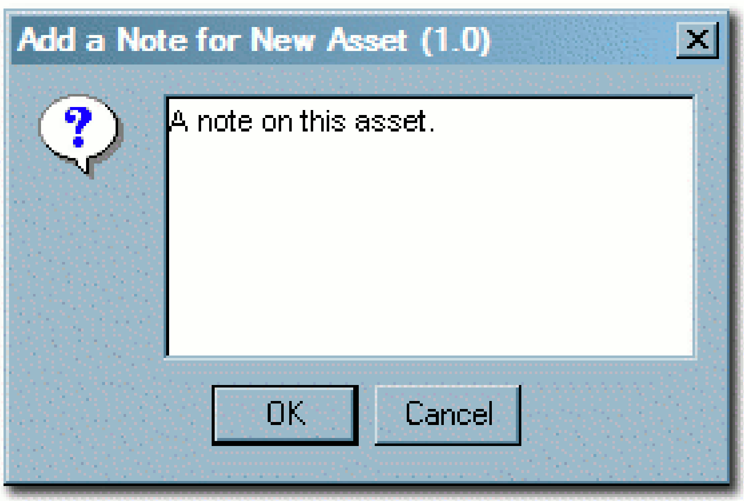
- Asset Creation
- Asset Update
- Changes in an Asset's **Registration Status**
- Changes in an Asset's **Active Status**
- Completion of an approval tab.

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
- Launching the Asset Editor
- Configuring System Options
- Asset/Compliance Template/Policy Migration

Overview

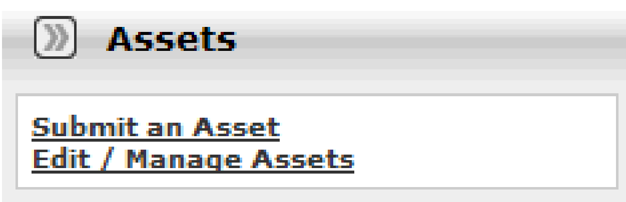
The **Asset Editor** is used to administer assets and to configure assets and types. Categories, relationships, rejection reasons, repositories, and vendors are also configured within the **Asset Editor**.

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

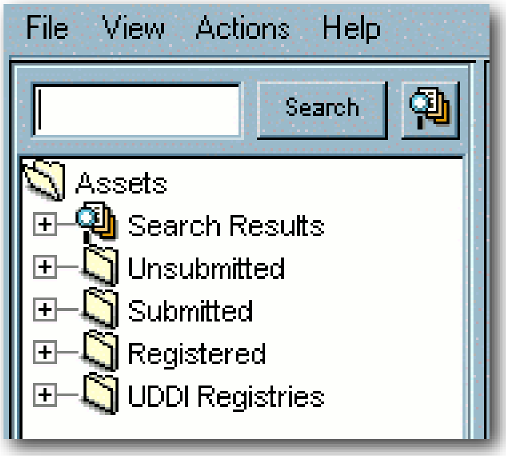
Launching the Asset Editor

This procedure is performed on the ALER **Assets** screen.

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

   The **Asset Editor** opens.



Configuring System Options

A number of system options can be configured from the **Actions** menu in the **Asset Editor**.

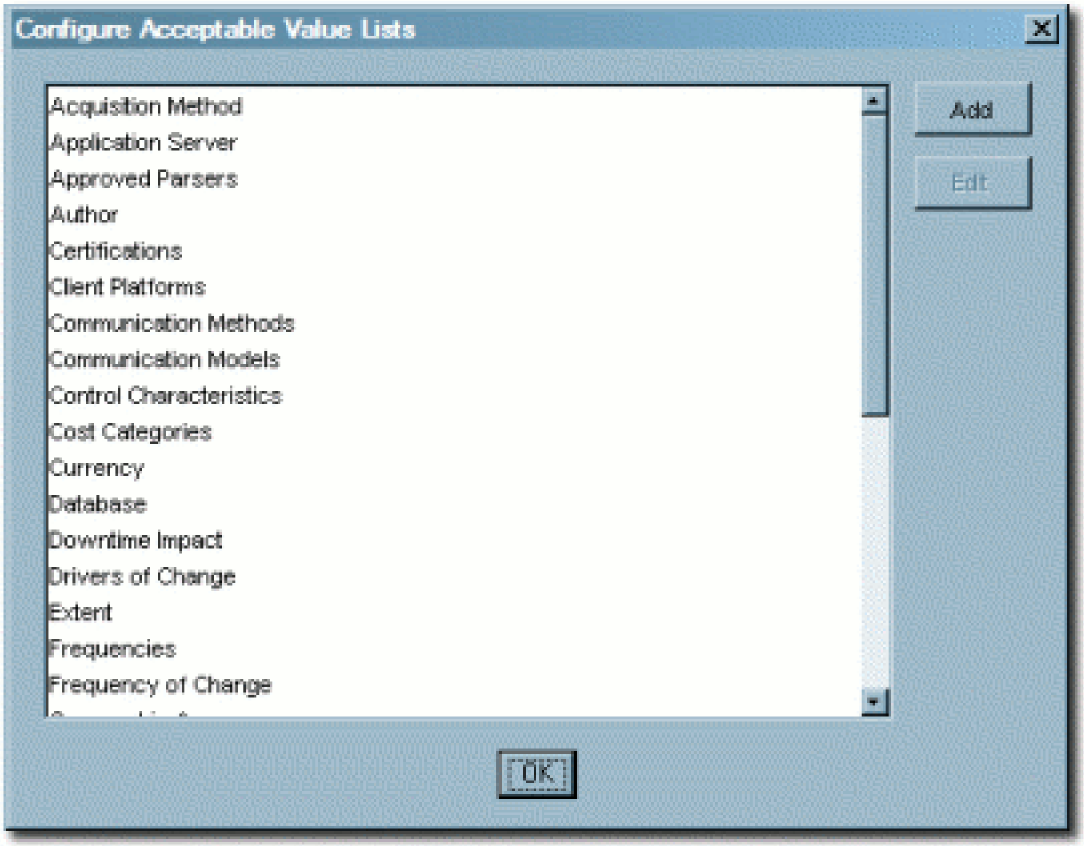
- Configure Acceptable Value Lists
- Configure Artifact Store
- Configure Categorizations
- Configure Relationships
- Configure Rejection Reasons

Configure Acceptable Value Lists

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

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

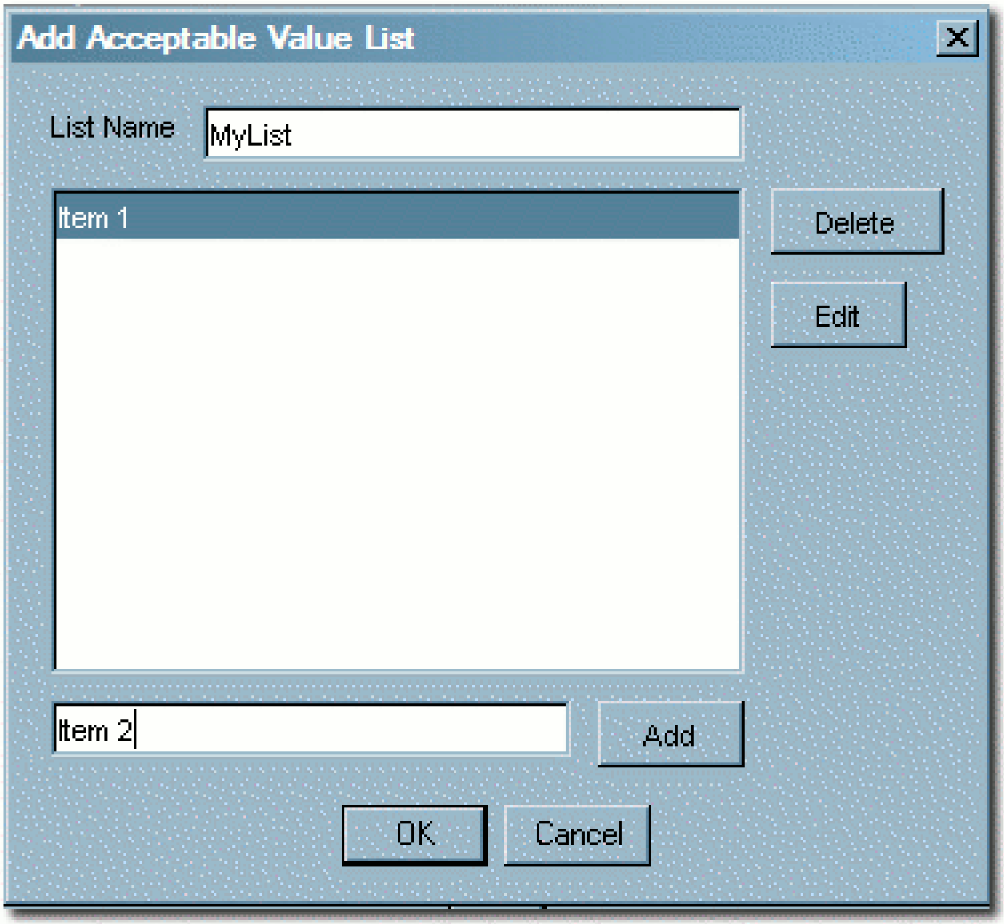
   The **Configure Acceptable Value Lists** window opens.



2. Click **Add**

   The **Add Acceptable Value List** window 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 and 5 as necessary to add additional list items.
7. When finished, click **OK.**

   The new list appears in the **Configure Acceptable Value Lists** window.

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

   The **Edit Acceptable Value List** window opens. (Same form as the **Add Acceptable Value List** window.)

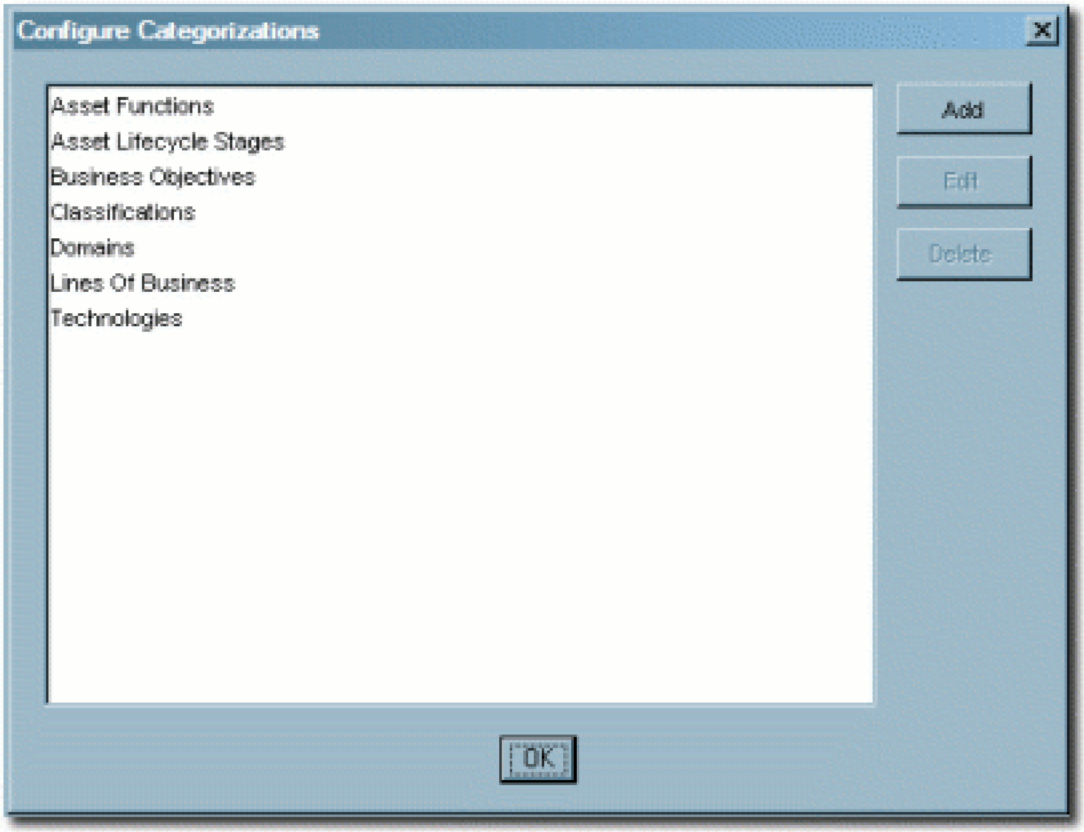
10. Make changes as necessary.
11. Click **OK**.

Configure Categorizations

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

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

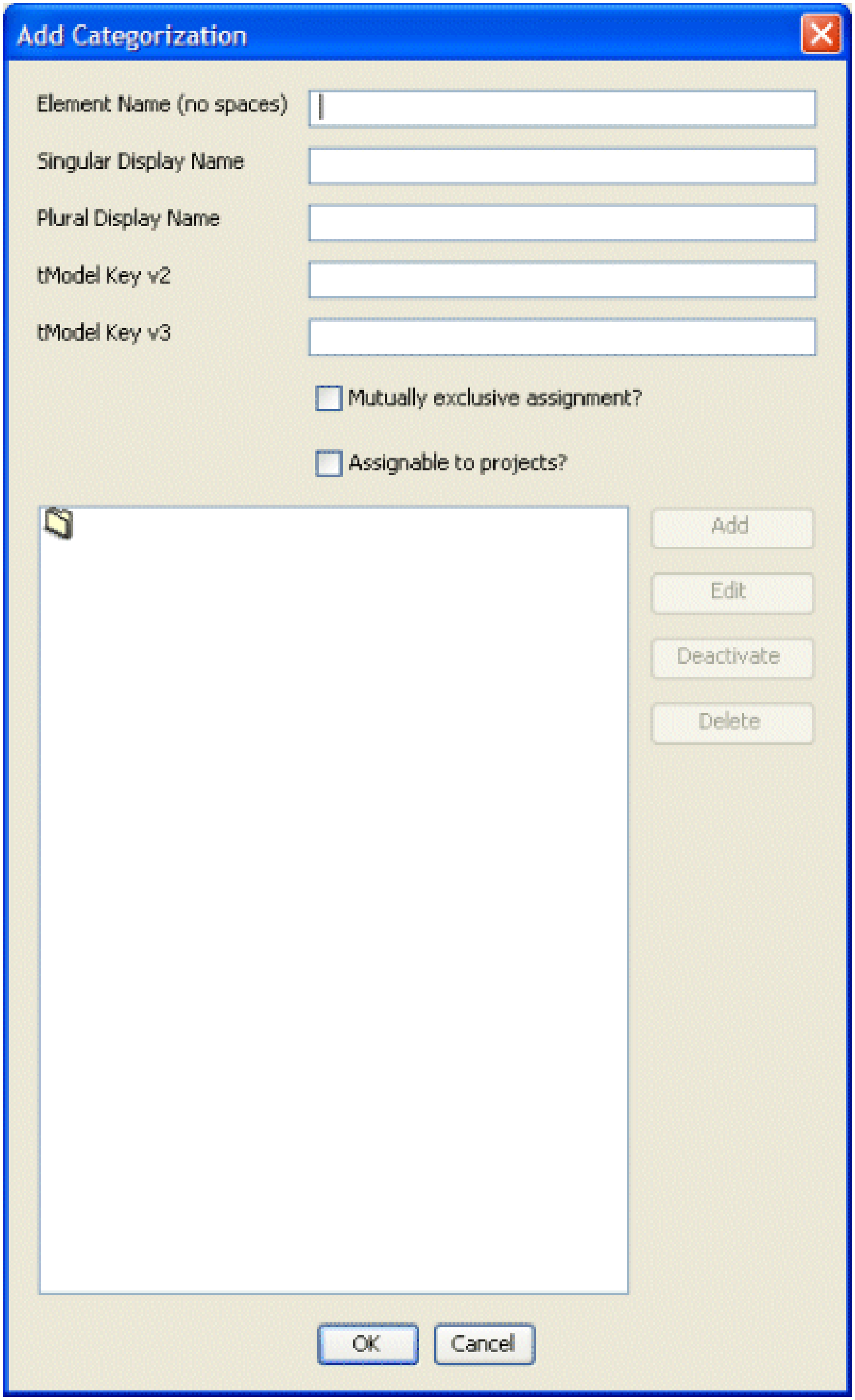
   The **Configure Categorizations** window opens.

2. Click **Add**.

   The **Add Categorizations** window opens.

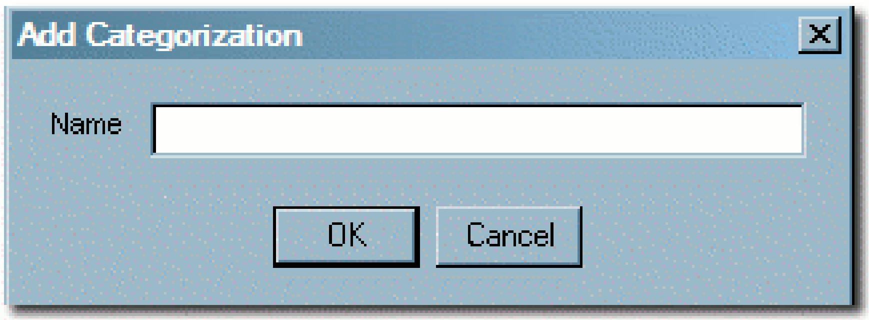
3. Enter the appropriate information in each of the text boxes.



4. Select the **Mutually exclusive assignment?** check box if assets can be assigned to only one of

the categorizations in this categorization type.

5. Select the **Assignable to Projects?** check box (if this Advanced Edition option has been enabled by your ALER Administrator) so assets can be assigned to projects.
6. If UDDI is enabled for your environment, then ALER automatically creates tModelKeys for categorizations. If required, an administrator can assign specific UDDI Version 2 or Version 3 tModelKeys to any categorization. for more information see, see the Automated Web Services Guide.
7. Click **Add** to add sub-categorizations.



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

   The new categorization appears in the **Configure Categorizations** window.
9. To edit any **Categorization**, locate it in the list in the **Configure Categorizations** window.
10. Click **Edit**.

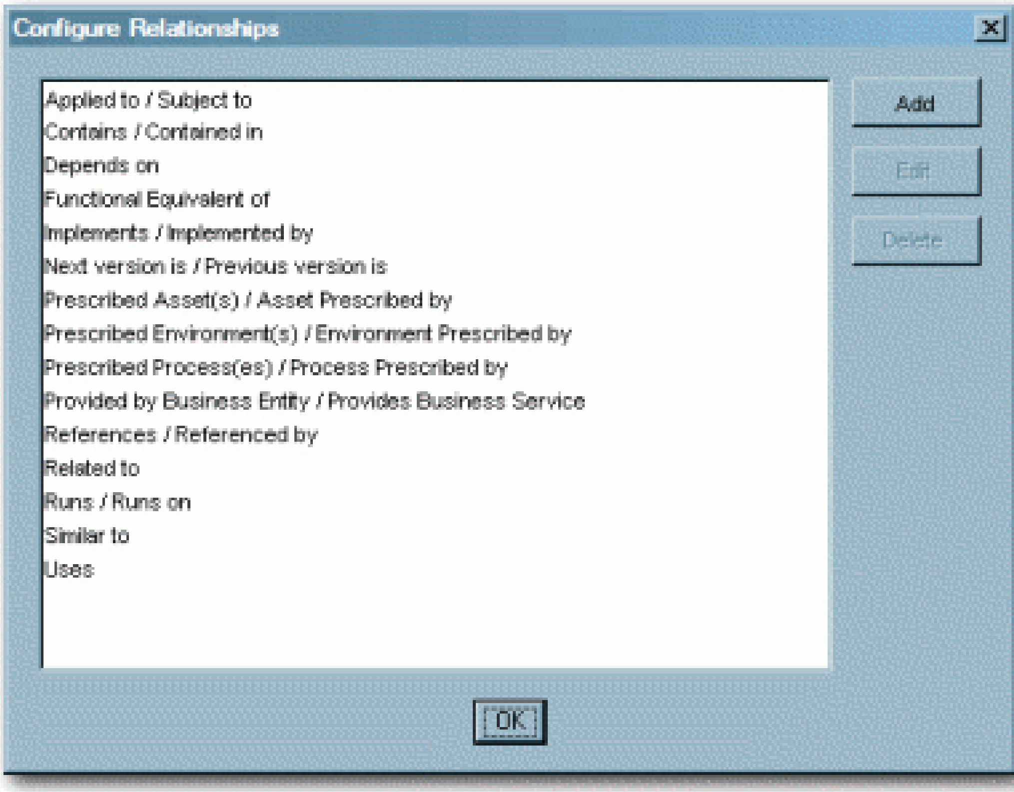
    The **Edit Categorization** window opens. (Same form as the **Add Categorizations** window.)
11. Make changes as necessary.
12. Click **OK**.

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.

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

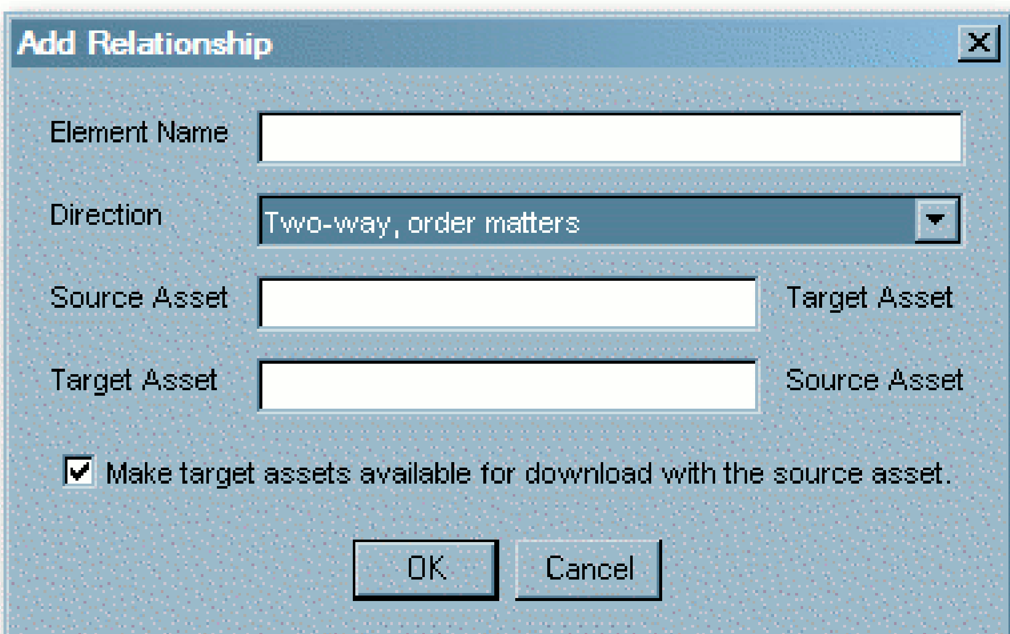
   The **Configure Relationships** window opens.



2. Click **Add**.

   The **Add Relationships** window opens.

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



(See **Relationship Labeling Conventions** for more information.)

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** window.

8. Click **Edit**.

   The **Edit Relationships** window opens. (Same form as the **Add Relationship** window.)

9. Make changes as necessary.

10. Click **OK**.

Configure System-Supplied Relationships

There are also *system-supplied* relationships in ALER with limited read-only functionality to end users. Unlike standard asset relationships, system-supplied relationships are used in a context that requires their name and direction to be immutable. Therefore, these relationships cannot be added, deleted, or modified by users, except where otherwise noted.

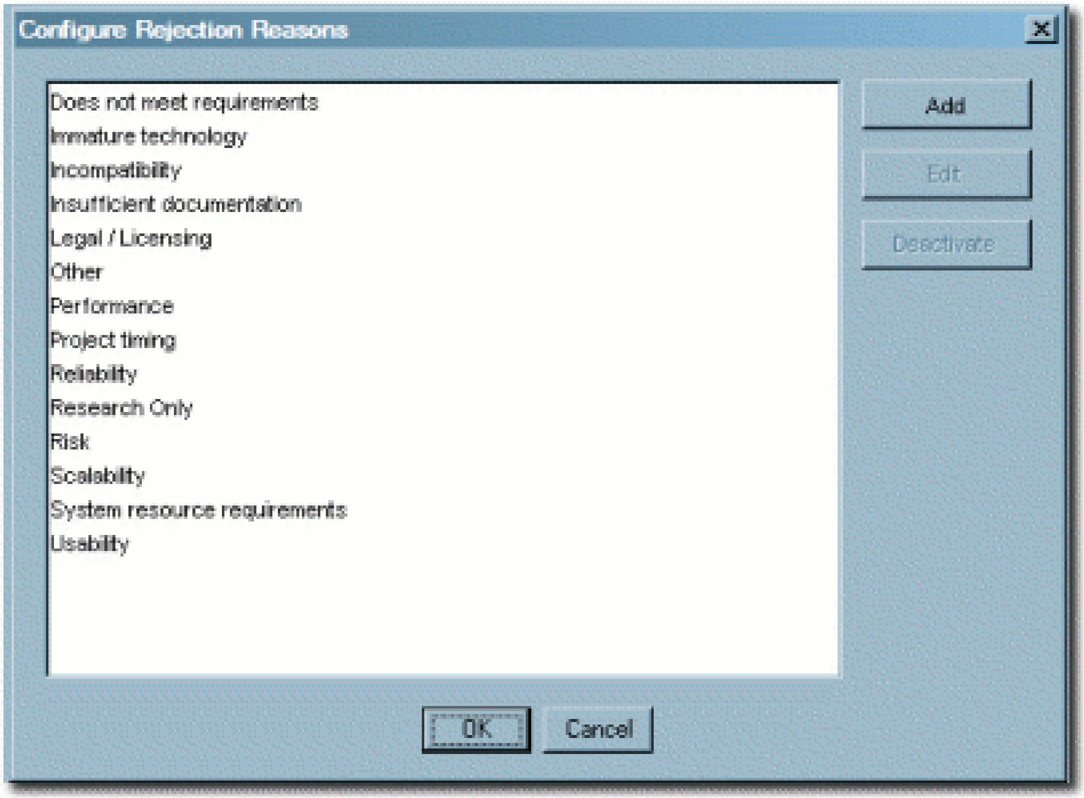
For for more information about this feature, see **System-Supplied Relationships**.

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.

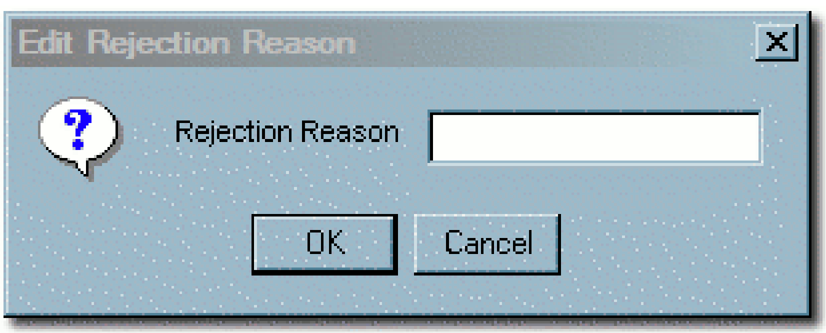
1. Select **Configure Rejection Reasons** from the **Actions** menu.

   The **Configure Rejection Reasons** window opens.



2. Click **Add**.

   The **Edit Rejection Reasons** window opens.



3. Enter the appropriate text in the **Rejection Reason** text box.
4. When finished, click **OK**.
5. To edit any **Rejection Reason**, locate it in the list in the **Configure Rejection Reasons** window.
6. Click **Edit**.

   The **Edit Rejection Reasons** window opens.

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

Configure Artifact Stores

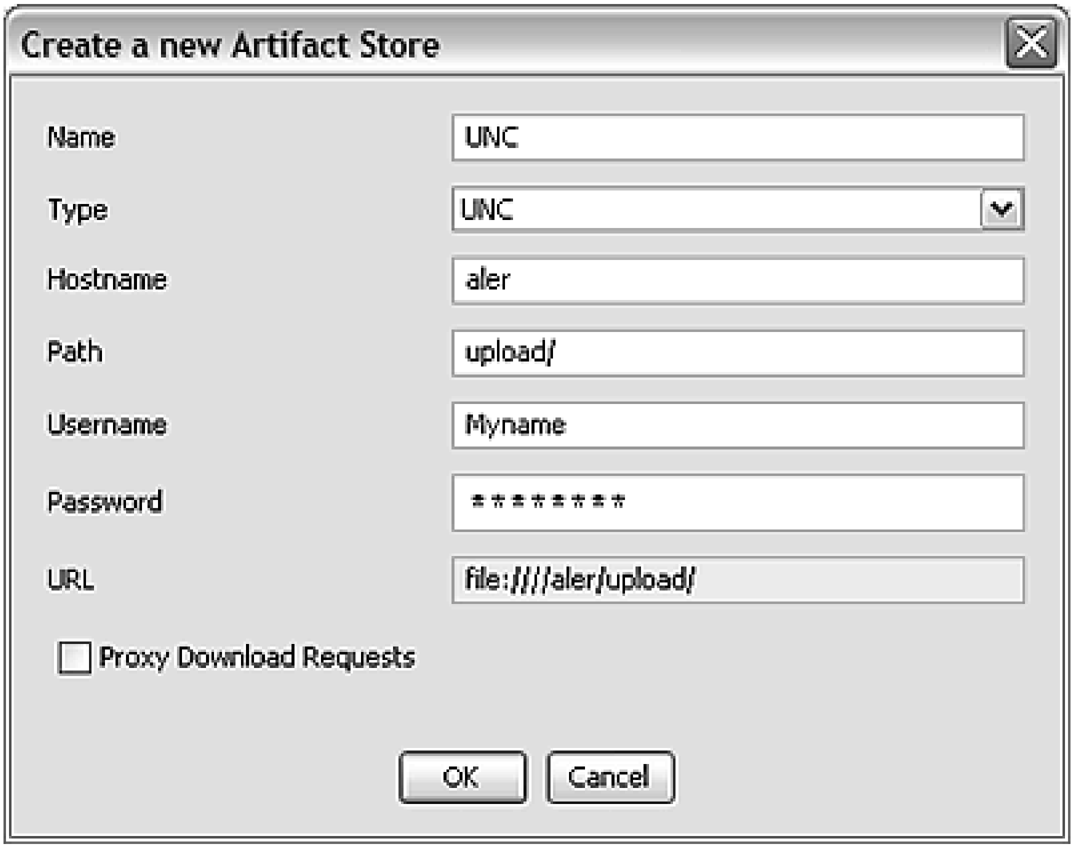
Determines where the files relevant to assets in ALER are stored.

1. Select **Configure Artifact Stores** from the **Actions** menu.

   The **Configure Artifact Stores** window opens.

2. Click **Add**.

   The **Create a new Artifact Store** window opens.



3. Enter a name for the artifact store.

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

   - 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.
     - **Raw SCM**
       - Access files via a raw SCM. Allows the selection of SCM Types, including CVS, Perforce, and Other. The selected SCM type automatically populates the **Download Path URI Suffix** field, but the field can be modified however necessary.
   - Depending on the integration options included in your installation of ALER, one or more of the following types may be available:

- **Perforce**
  - Accesses the Perforce source control management system
- **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 **Artifact Store**, locate it in the list in the **Configure Artifact Stores** window.
9. Click **Edit**.

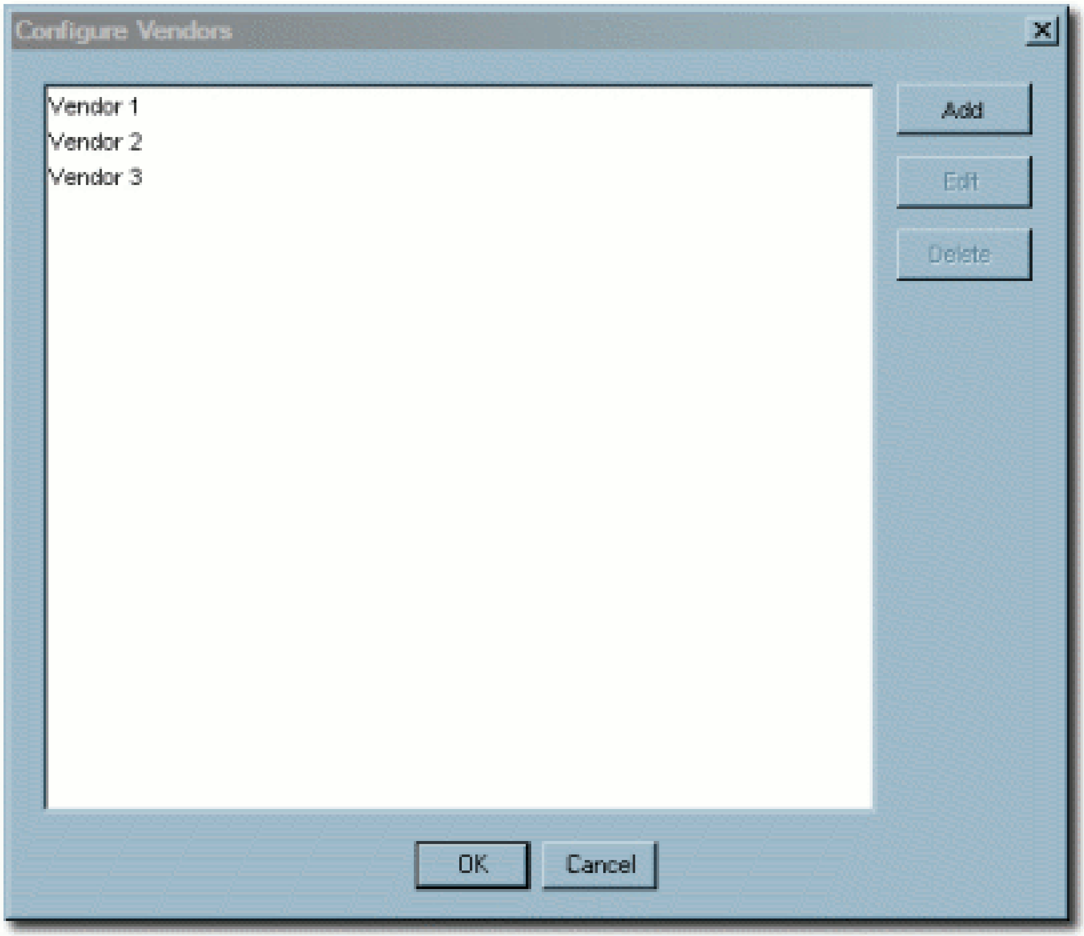
   The **Edit Artifact Store** window opens. (Same form as the **Create a new Artifact Store** window.)
10. Make changes as necessary.
11. Click **OK**.

Configure Vendors

Defines/identifies vendors providing assets to the repository.

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

   The **Configure Vendors** window opens.



2. Click **Add**.

   The **Add Vendor Name** window 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** window.
6. Click **Edit**.

   The **Edit Vendor Name** window opens. (Same form as the **Add Vendor Name** window.)

7. Make changes as necessary.

8. Click **OK**.

Asset/Compliance Template/Policy Migration

Overview

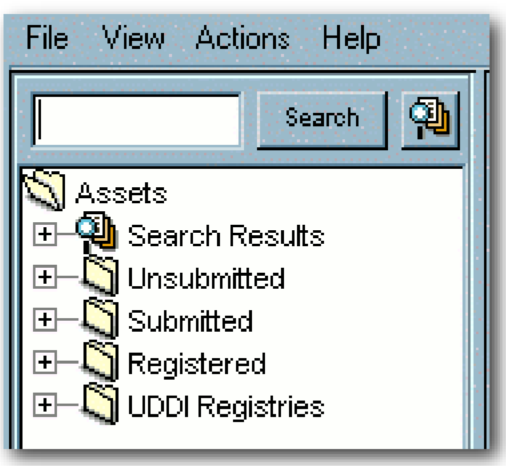
Migration refers to the transfer of metadata and files from one asset, compliance template, or Policy to another, usually of the same type. Since it is easier to edit metadata than to recreate it, this function allows users to quickly create different versions of assets, compliance templates, or policies. 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 ALER.

It is also possible to migrate an asset, compliance template, or policy 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.

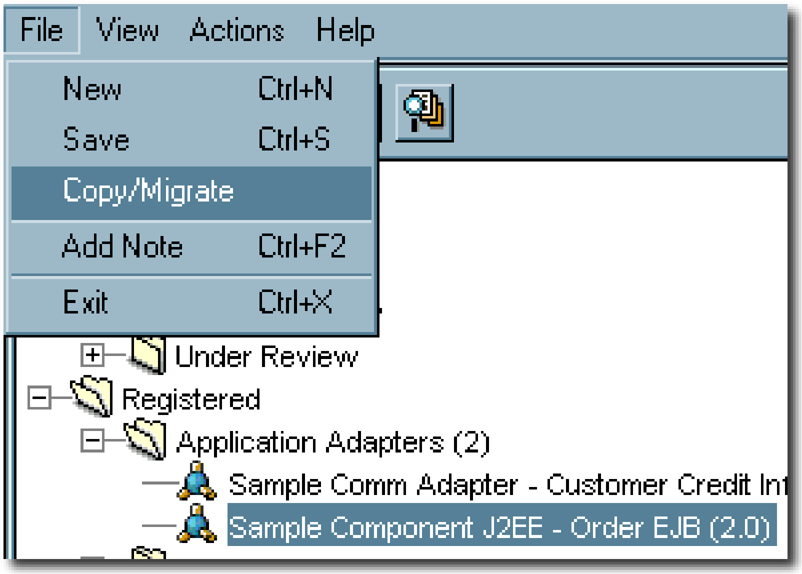
Migrating an Asset/Compliance Template/Policy

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

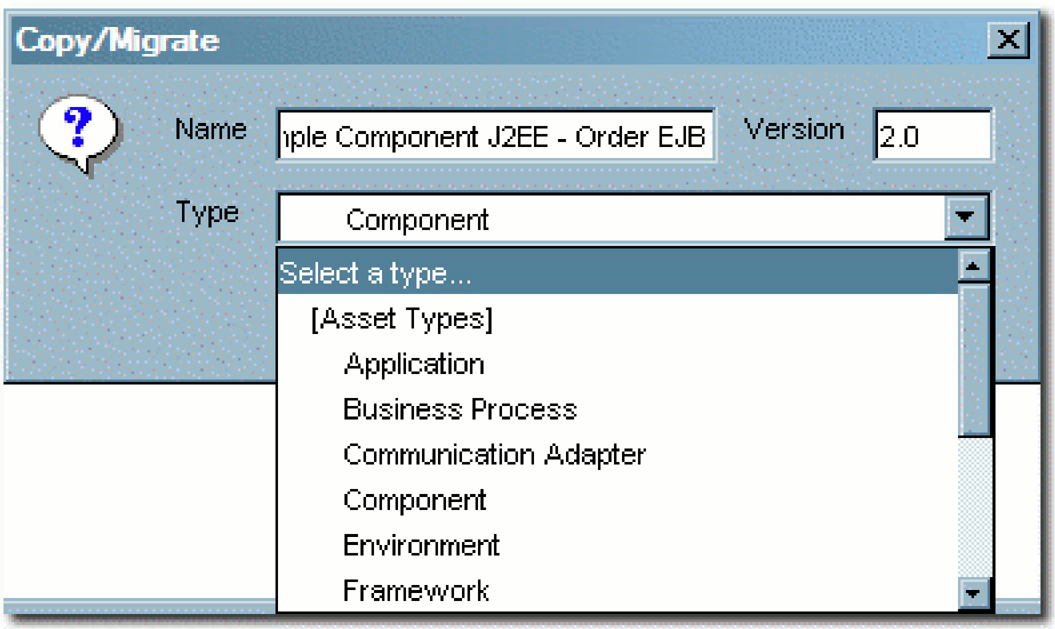
1. Use **Search** or browse the **Asset Editor** file tree to locate the source asset or compliance template to be migrated.



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



The **Copy/Migrate** window opens



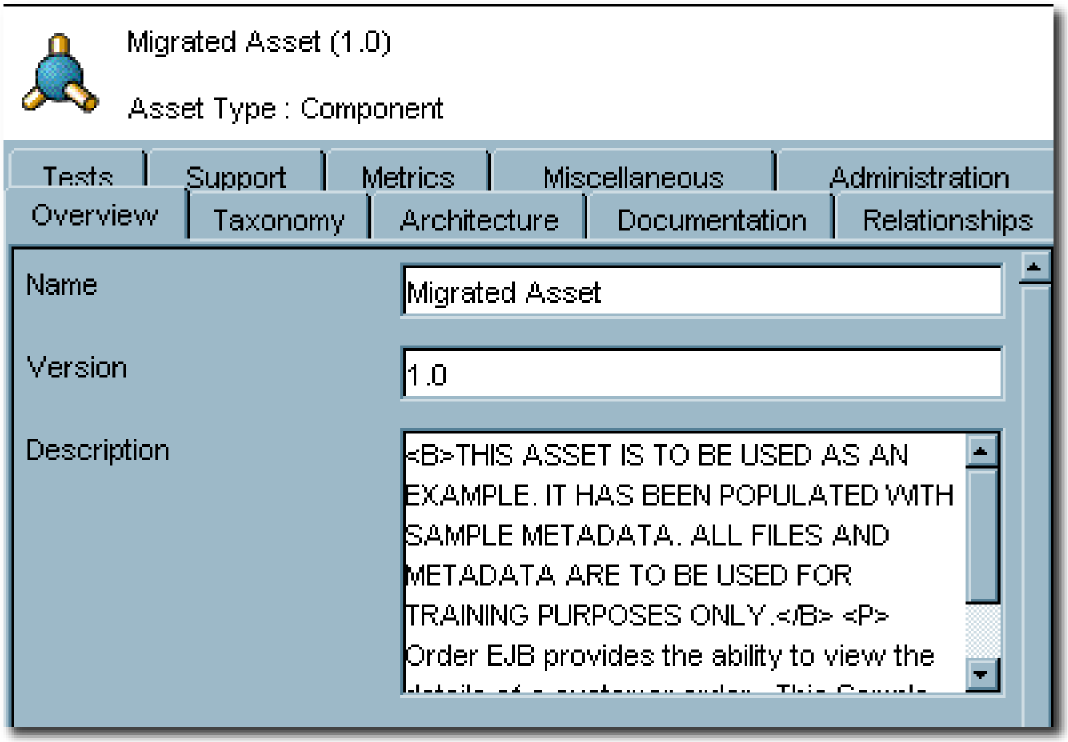
3. Enter the appropriate information in the **Name** and **Version** text boxes.

4. Select the destination **Type** (the type to which the source artifact is to be migrated) in the **Type** drop-down.

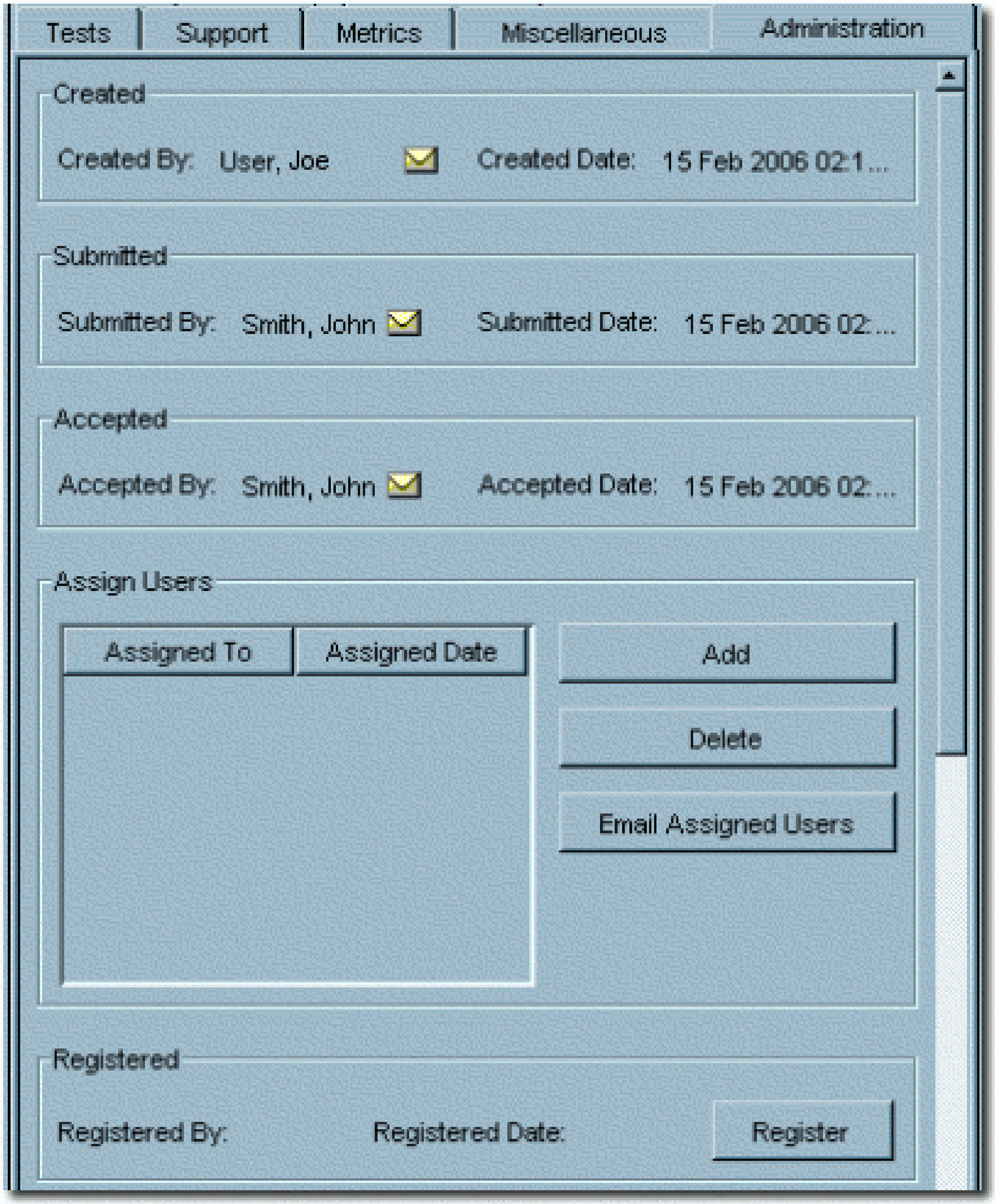
   Migrating assets between dissimilar types will affect the display of asset information in the asset detail and in the **Asset Editor**.

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

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



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



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

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).

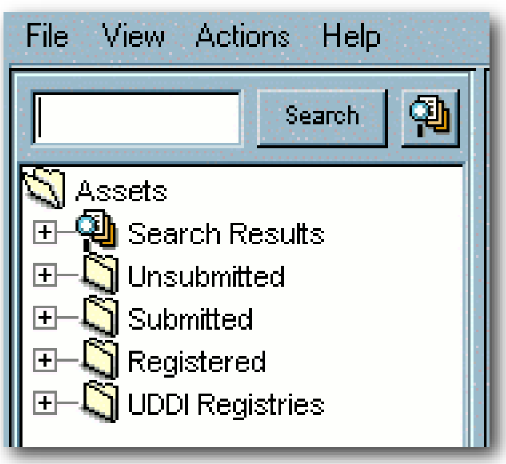
- **Retired**
  - The status assigned to any asset in the repository that is retired from general use. A retired asset can be re-activated or made inactive. Retired assets cannot be selected for use (the **Use - Download** button is not displayed), nor will they show up in a search; however, they will 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

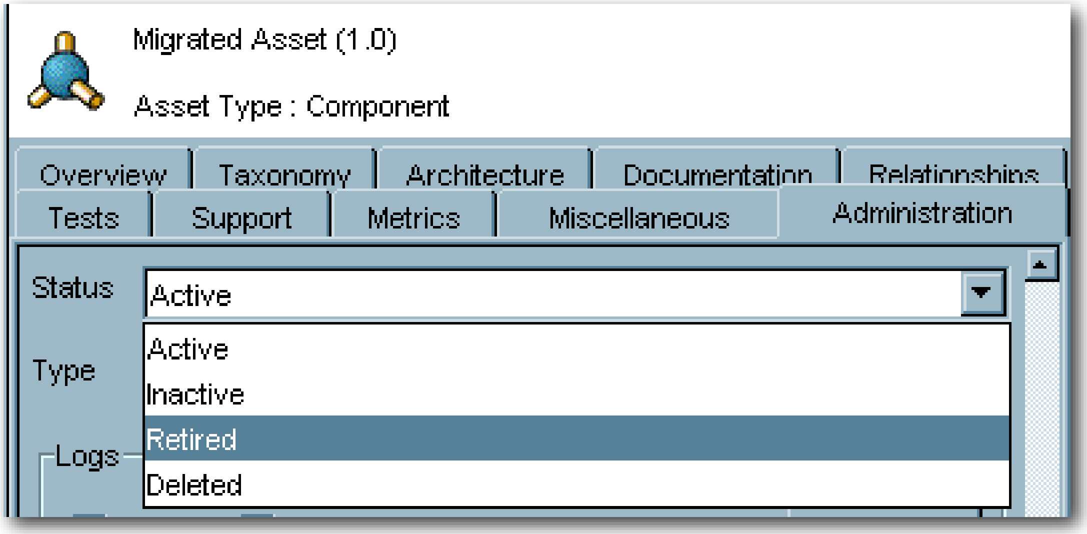
This procedure is performed in the **Asset Editor**. Any changes to an asset's status are automatically saved by the **Asset Editor**.

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.



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

Relationship Labeling Conventions

Relationship mapping and management is an important aspect of software asset portfolio management. ALER includes pre-configured asset relationships, and also provides the means to create and manage custom relationships. Asset relationships provide valuable contextual information on assets and their use. When creating relationships, careful attention to labeling will promote greater understanding of the assets, and of the relationships that connect assets to each other, to the projects that produce and consume them, and to the policies that govern their creation and use.

Relationships are created and managed within the ALER **Asset Editor**. (See the ALER **Registrar Guide** for more information on using the **Asset Editor**.)

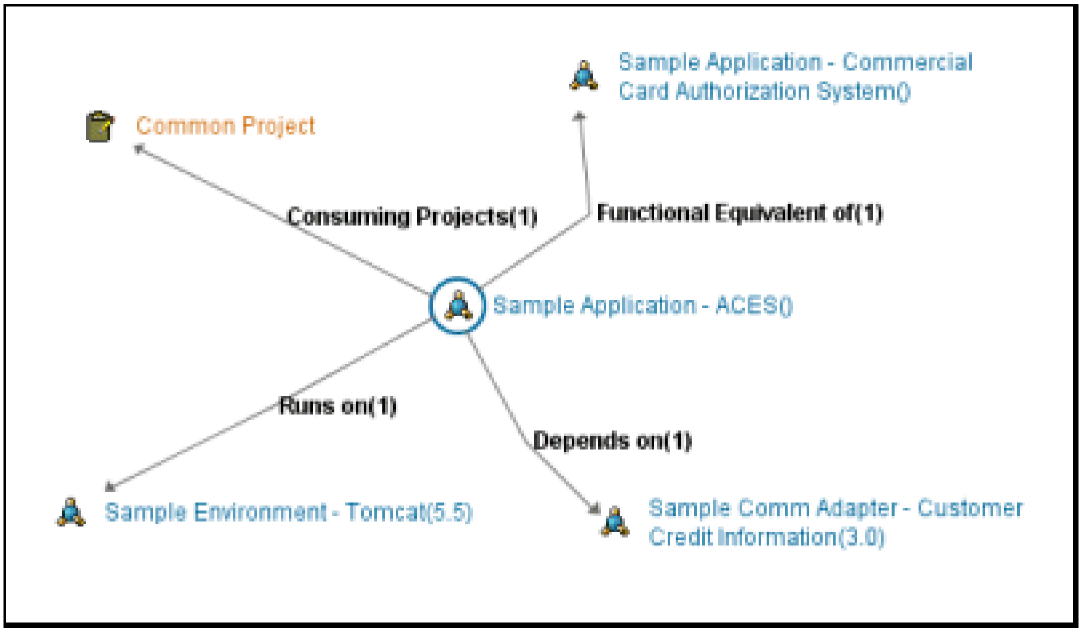
The chart below lists examples of the labels for pre-configured ALER asset relationships. These are only examples to be followed when creating new relationships.

Relationship	Explanation
Prescribed Asset(s)	A Requires Asset B
Asset Prescribed by	Asset B is Required by A
Applied to	Rule A Applied to B
Subject to	B Subject to Rule A
Contains	A Contains B
Contained In	B is Contained in A
Implements	A Implements B
Implemented by	B is Implemented by A
Next version is	B is the Next version of A
Previous version is	A is the Previous version of B
Prescribed Process(es)	Process A is applied to B
Process Prescribed by	B must follow process A
References	A References B

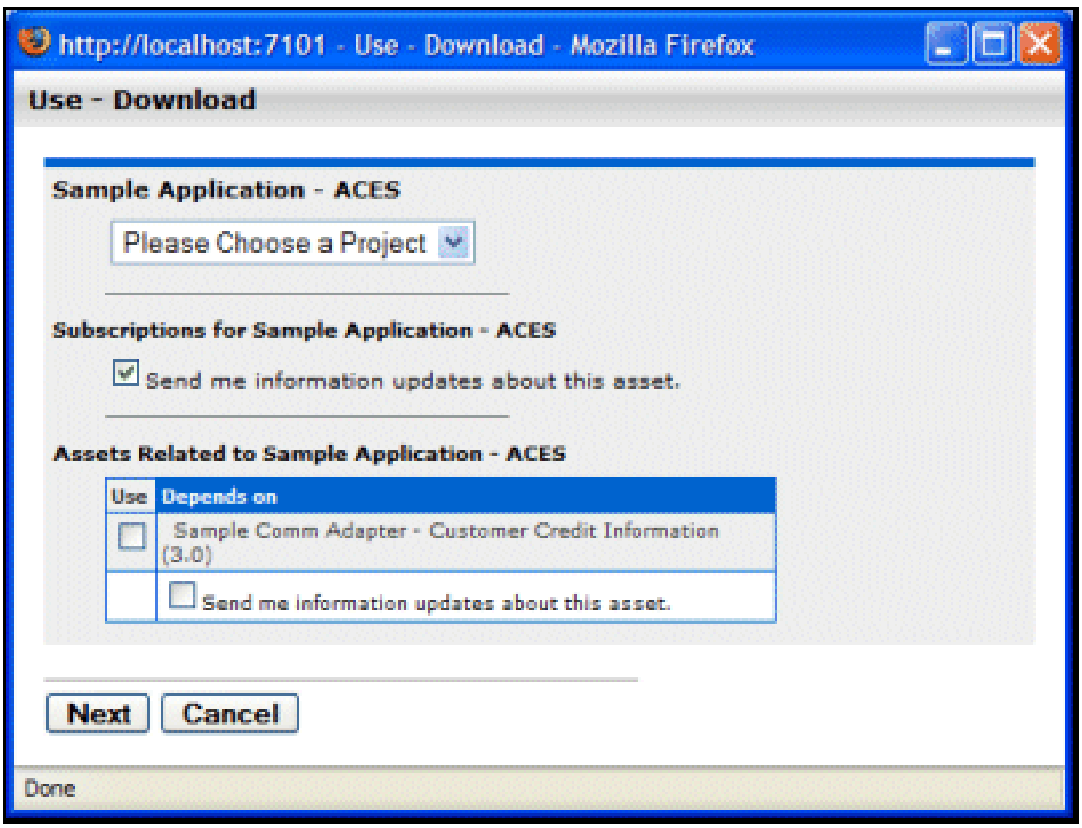
Referenced by	B is Referenced by A
Prescribed Environment(s)	A Requires Environment B
Environment Prescribed by	B is the Required Enviroment for A
Runs	A Runs B
Runs on	B Runs on A
Functional Equivalent of	A is the Functional Equivalent of B
Related To	A is related to B
Similar To	A is similar to B
Uses	A Uses B
Depends On	A Depends on B
Provides Business Service	Business Entity A is the service provider for Service B
Provided by Business Service	B is a Service Provided by Business Entity A
Applied policies	Policy A applies to asset B
Assets applied to	Asset B is subject to Policy A

Relationship Display

The labels assigned to relationships appear to general users in the **Relationships** section/tab in the asset detail and in the **Navigator**.



Related assets may also appear during the asset **Use/Download** process.



System-Supplied Relationships

Overview

User-defined asset relationships define the connection, interaction, or interdependence between assets, as explained in **Relationship Labeling Conventions**. Whereas, *system-supplied* asset relationships are used for system-specific relationships within ALER, such as allowing for more complex matches when doing asset updates. Therefore, users cannot create or delete system-supplied relationships, nor can they modify a system-supplied relationship's direction, which is always read-only. In order to view system-supplied relationships, they must be made visible by enabling the `cmee.show-system-supplied-relationships` system setting, as described in the "General User Interface" section of the Administration Guide.

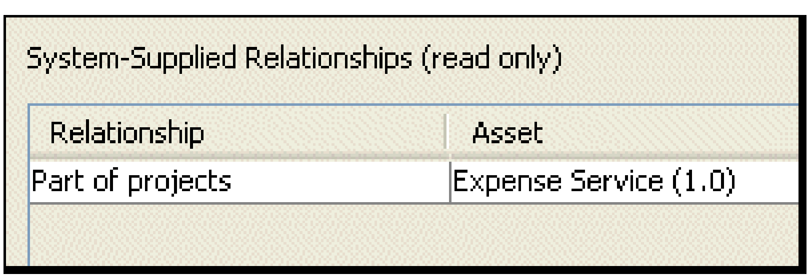
Viewing System-Supplied Relationships in the Asset Editor

Users can view system-supplied relationships in the **Asset Editor** if they have been applied to an asset by the system.

Relationships Tab

1. In the Asset Editor, view an asset and select the **Relationships** tab.

2. The asset's relationships are divided into two sections, one for editable, user-defined relationships and the other for the read-only, system-supplied relationships. All relationships to an asset are viewable in this manner.

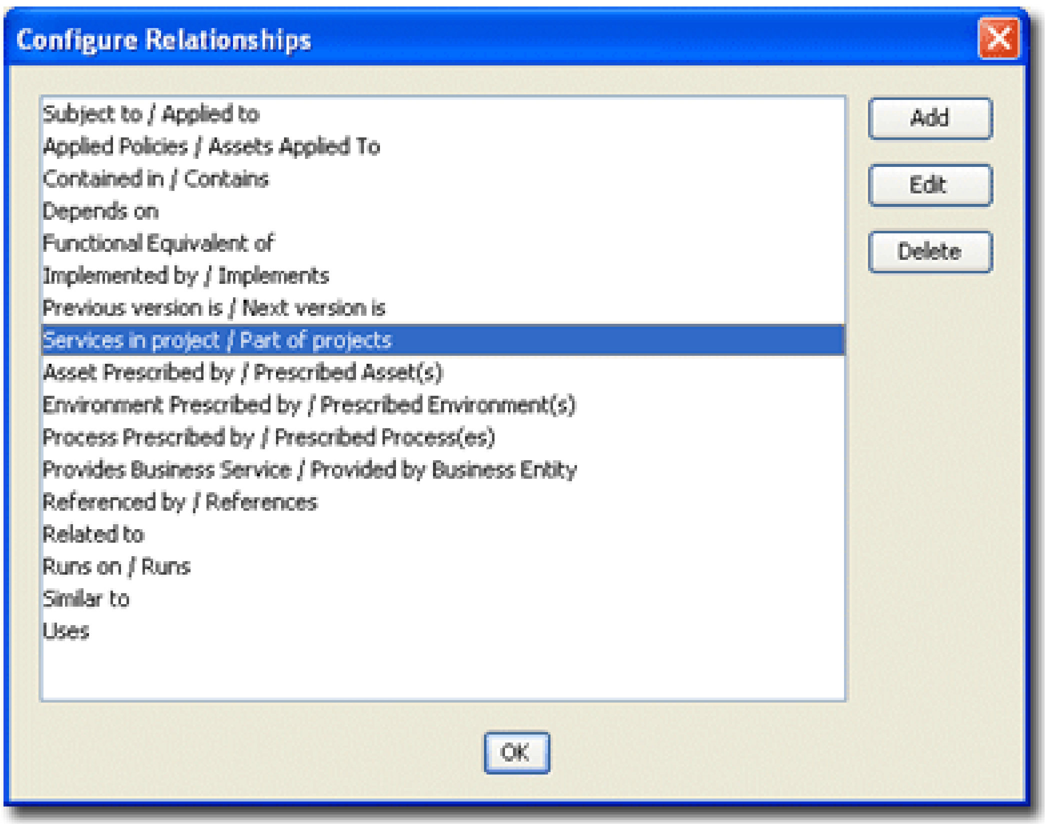


Configuring Relationship Types

Users cannot create or delete system-supplied relationships, nor can they modify a system-supplied relationship's direction, which is always read-only. However, users can edit the display **Target** and **Source** names, and can also enable the asset's availability for downloading. For more information on viewing other relationship types, see **Using the Asset Editor**.

1. In the **Asset Editor**, select **Configure Relationships** from the **Actions** menu.

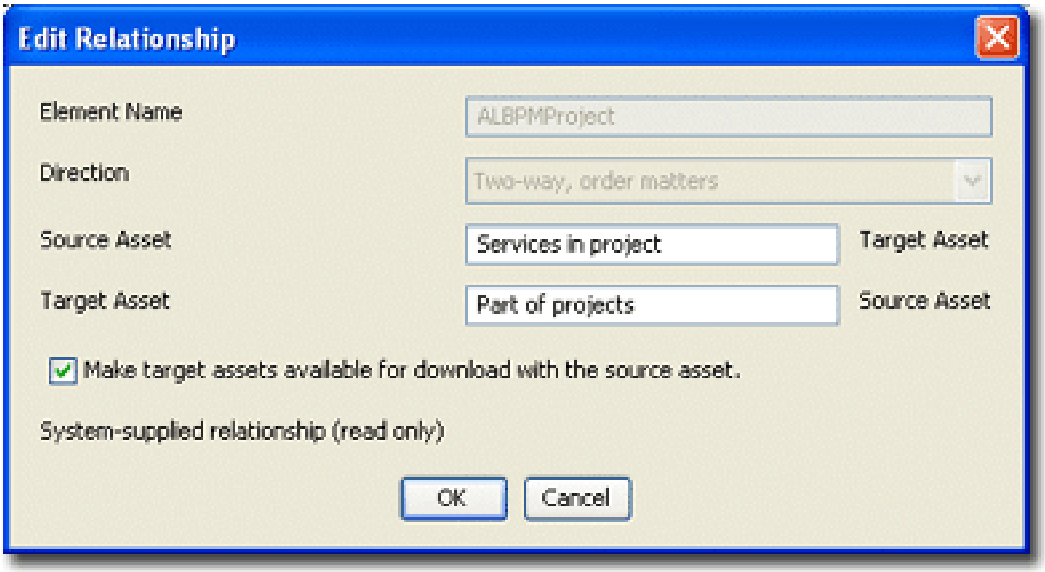
   The **Configure Relationships** window opens.



2. To edit any **System-Supplied Relationship**, locate it in the list in the **Configure Relationships** window.

3. Click **Edit**.

   The **Edit Relationships** window opens. (Same form as the **Add Relationship** window.)



4. Make the appropriate changes to the **Source Asset** and **Target Asset** text boxes.

   The ready-only, system-supplied 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** check box.

6. Click **OK**.

Viewing System-Supplied Relationships

- **Viewing Relationships** - Similar to the **Asset Editor**, relationships displayed in the asset detail of ALER are divided into two sections, one for user-defined relationships and the other for system-supplied applied relationships.

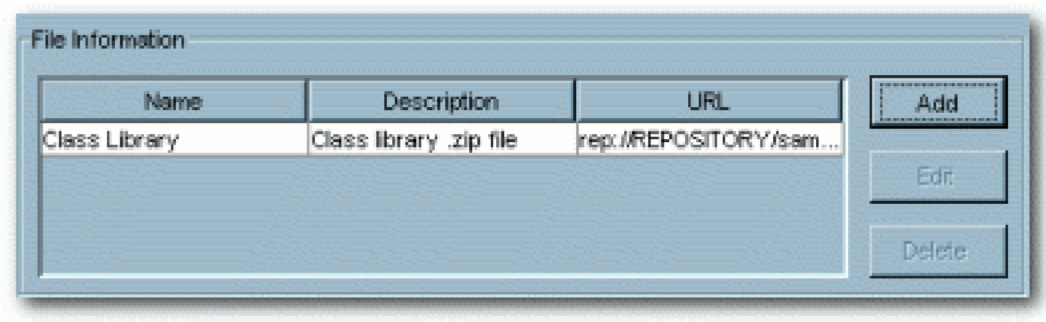
- **Use-Download** - Users can download assets related by both traditional and system-supplied relationships. This feature can be enabled/disabled in the **Asset Editor** per relationship.

- **Navigator** - System-supplied relationships are viewable alongside traditional relationships in the Navigator.

Adding Files to an Asset

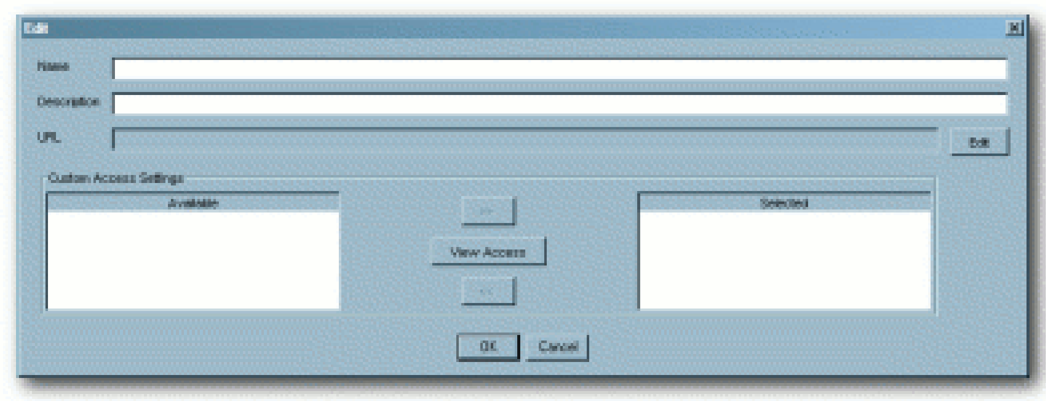
This procedure is performed in the BEA AquaLogic Enterprise Repository **Asset Editor**.

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.



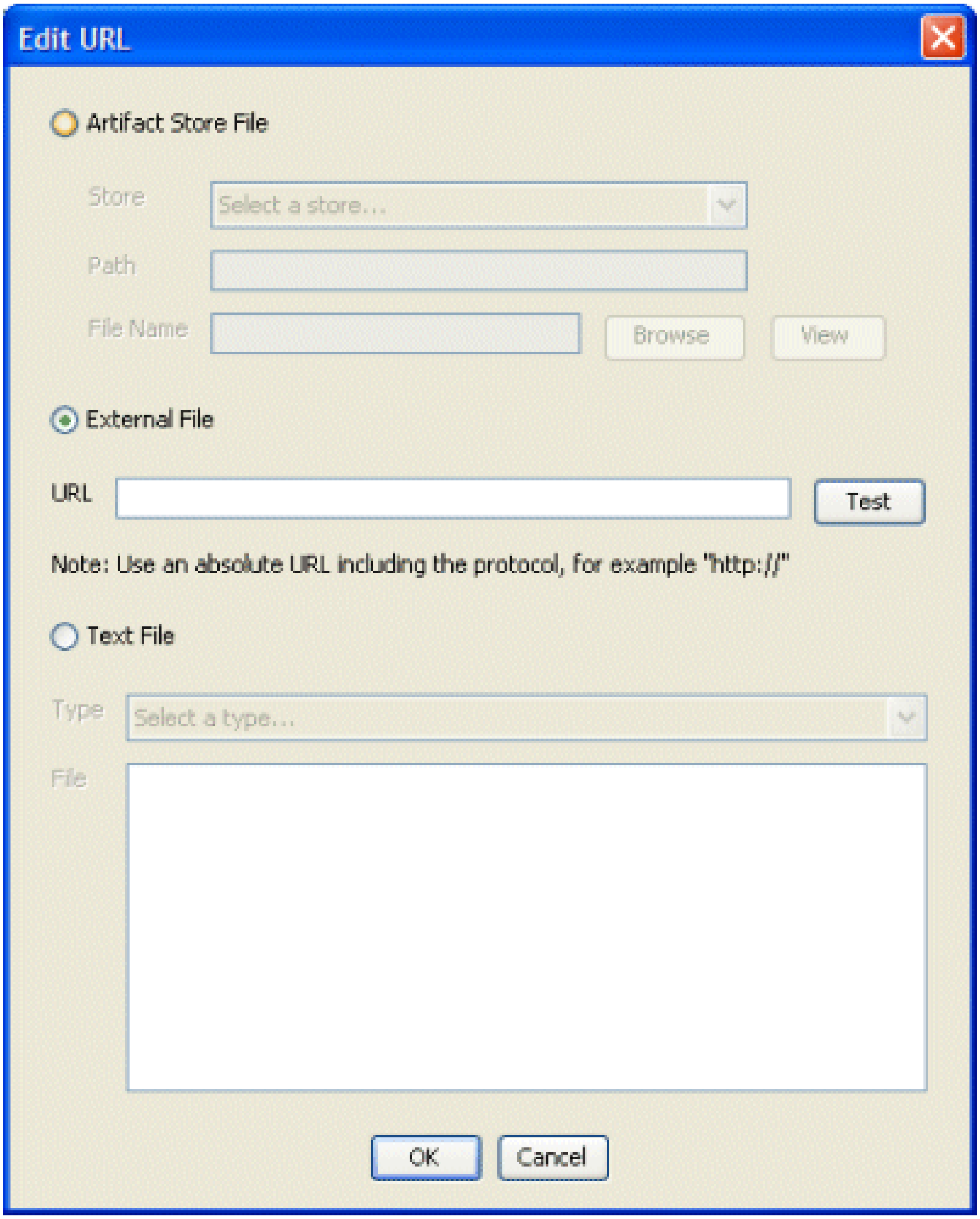
3. Click the **Add** button.

   The **Edit** pop-up opens.



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.



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

   - **Artifact Store 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.

File Downloads by Proxy

Overview

ALER normally delivers asset payloads from a remote repository to the end user's browser through a browser redirect. (Exceptions include the use of ClearCase or an ALER-controlled upload repository.)

When a username and password are required for repository access, they are passed to the user's browser. In certain circumstances it may be possible for the user to ascertain the username/password for the remote repository or to obtain a browsable path to gain unauthorized and unrecorded access to other files within that repository.

ALER's **Proxy Download Requests** feature solves this problem by allowing ALER to act as the user's proxy, eliminating the need for direct user access to the remote repository.

During the proxy process, ALER downloads the files from the remote repository and then streams them to the end user. The repository username, password, and filepath are not passed to the end user's browser.

The **Proxy Download Requests** feature can also be used to provide access to files stored in repositories that are otherwise available only to limited segments of the organization's ALER user base, as is the case when a repository instance located on a publicly accessible Web server must connect to a firewall-restricted file repository.

Configuration

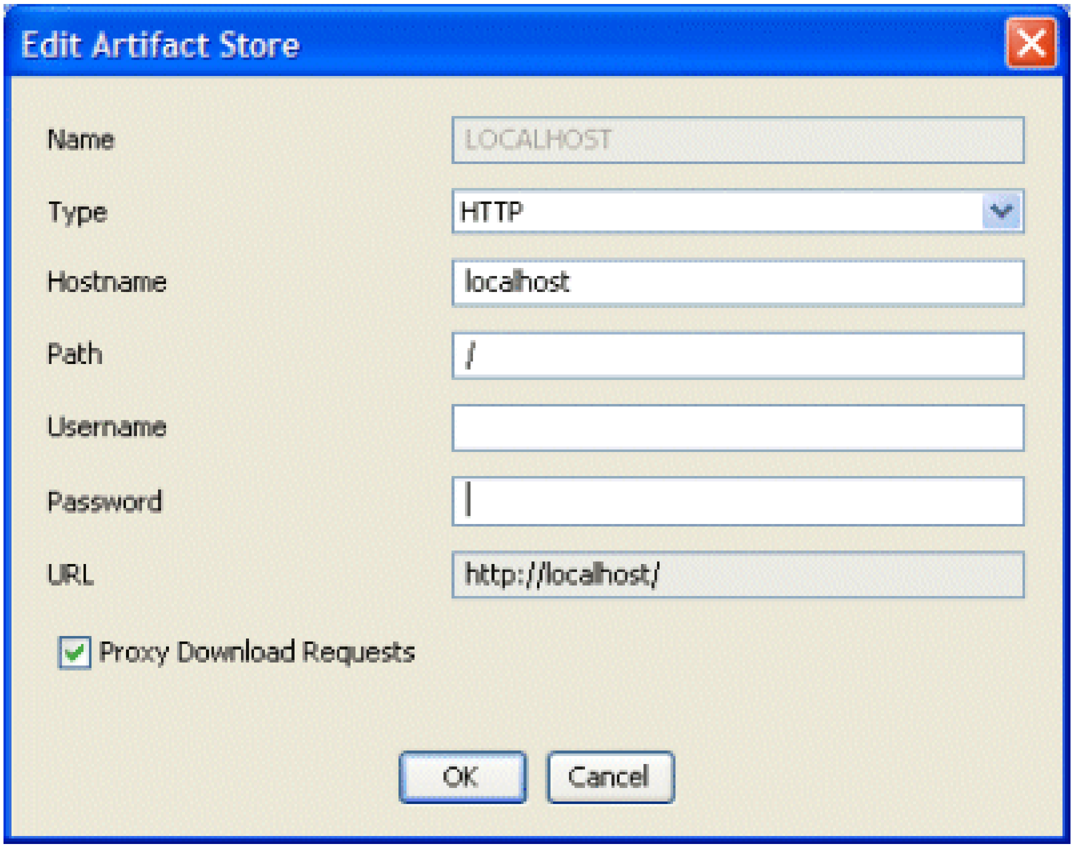
- The proxy download feature supports only repositories using the following protocols:
    - HTTP
    - HTTPS
    - FTP
- ALER must be able to open a network connection to the file repository.

Enabling Proxy Download Requests

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

1. Open the **Actions** menu.
2. Click **Configure Artifact Stores**.
3. Select the appropriate artifact store from the list.

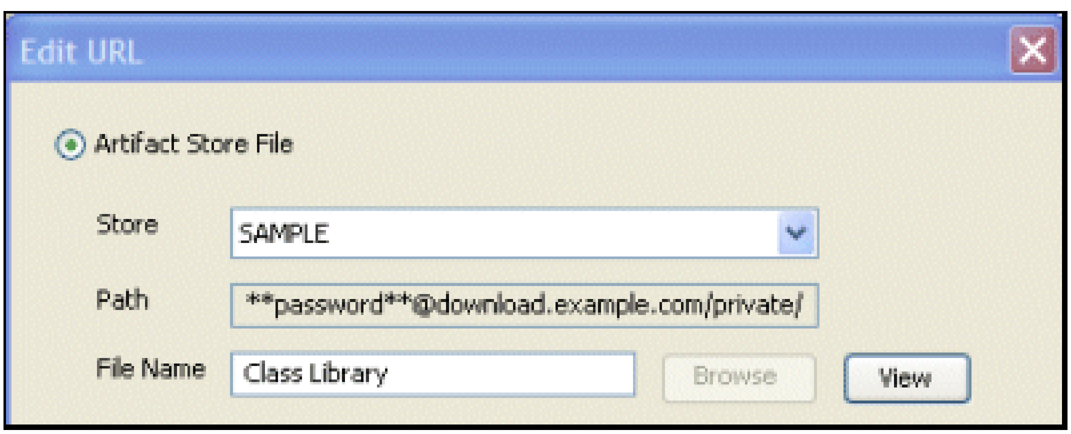
4. Click **Edit**.
5. Check the **Proxy Download Requests** option.



6. Click **OK** to close the **Edit Artifact Store** window.

7. Click **OK** to close the **Configure Artifact Store** window.

   Changes take immediate effect. All download requests for files in the selected artifact store are proxied, as are requests to view files in the **Edit URL** window in the **Asset Editor.**



Considerations

Proxy downloaded files pass through the network from the file store, to ALER, to the end user. Given the system performance implications of this process, we recommend the following limitations to the use of the **Proxy Download Requests**:

- Do not use the **Proxy Download Requests** feature for files stored on otherwise publicly accessible servers.
- Do not use the proxy download feature for particularly large files.

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.

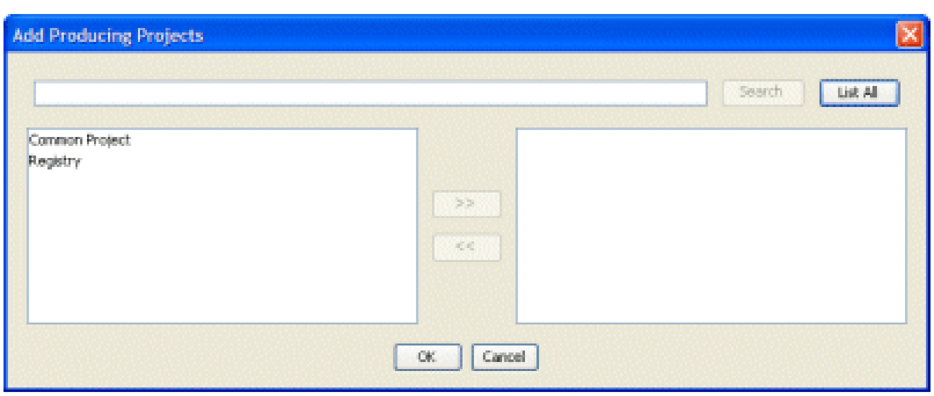
Adding a Producing Project to an Asset

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.



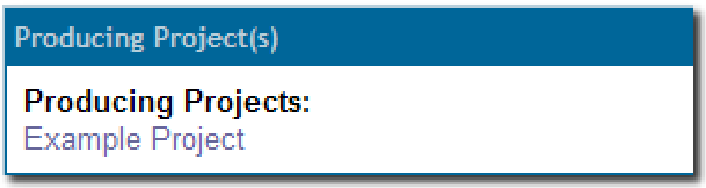
Projects can also be located by using the Search function in the **Add Producing Projects** pop-up.

4. Select the appropriate project and use the arrow button (**>>**) to move the project to the window on the right. You can also double-click project names to move them back and forth.
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.



Using the Type Manager

Overview

Understanding Types

Each artifact in ALER 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 accommodate 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 ALER. ALER ships with several **Types**. These may be modified, or new types can be created using the **Type Manager**.

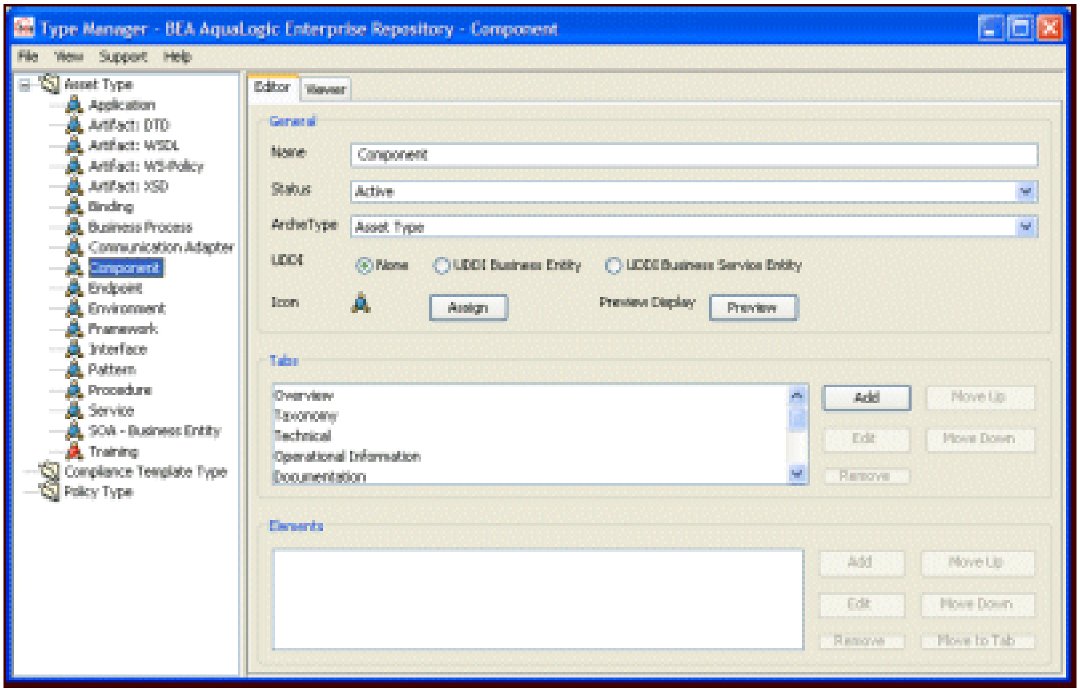
The **Type Manager** controls the organization and display of information for each artifact as it appears in the **Asset Editor** and in the **Asset Detail**.

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, compliance template, or policy from the tree to view/edit its configuration.

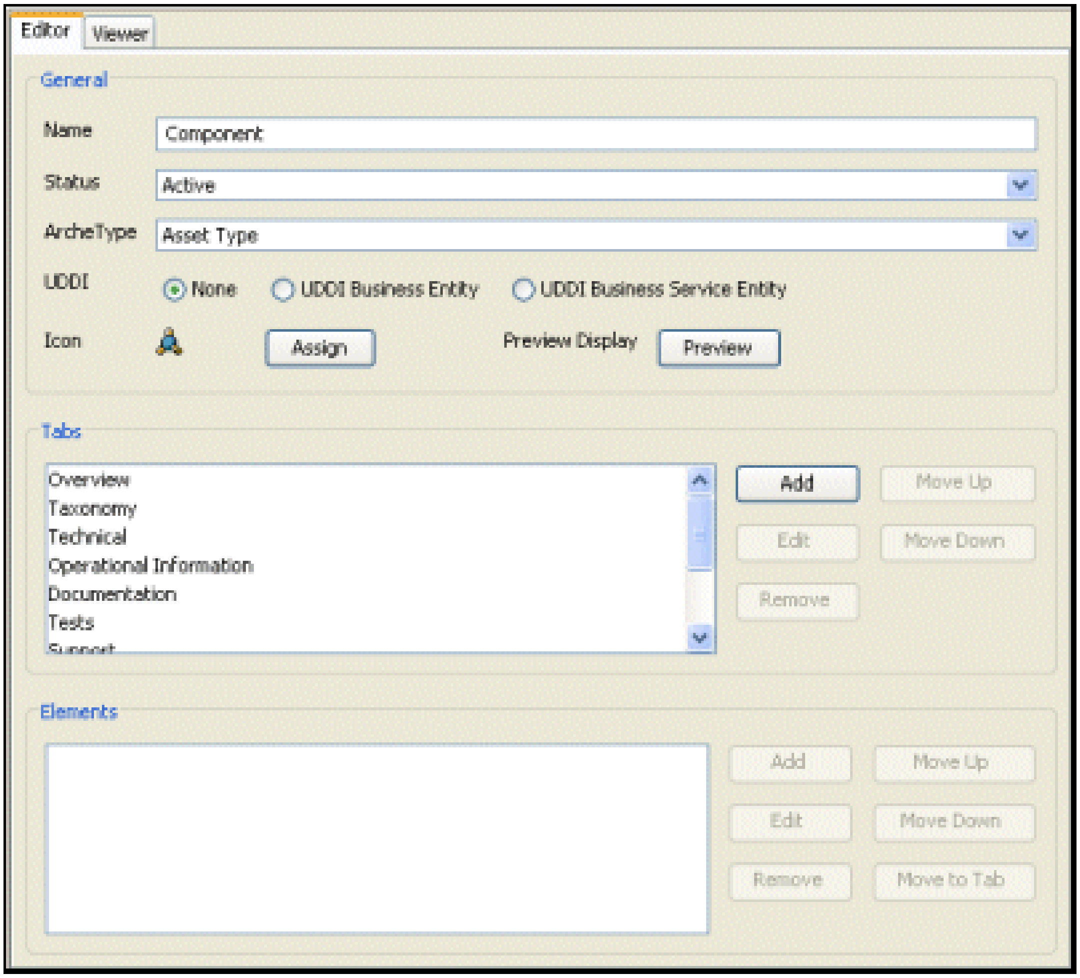
Type Manager Views

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 **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, compliance template, or policy 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**

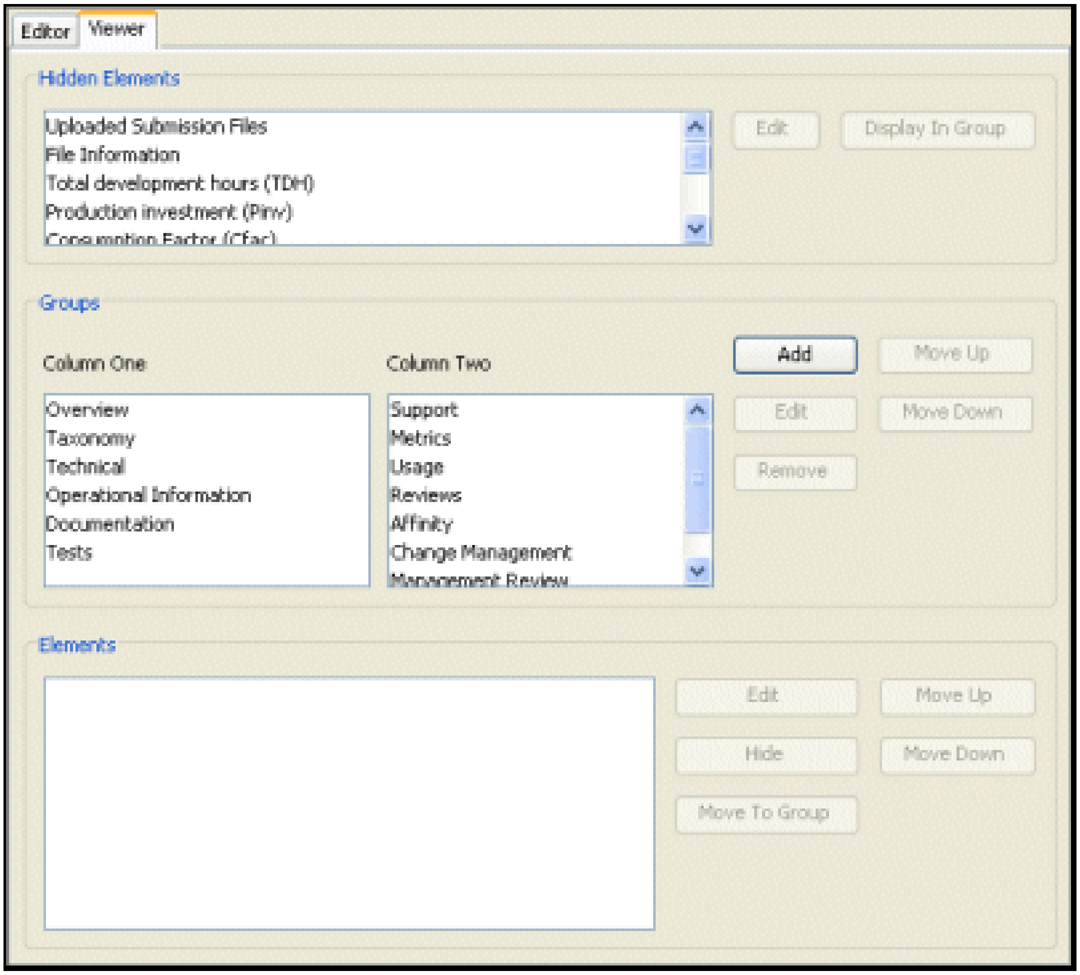
These actions may be applied to any item listed in the **Tabs** or **Elements** sections. Simply select the item, and then click the appropriate button.

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, or policies 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.

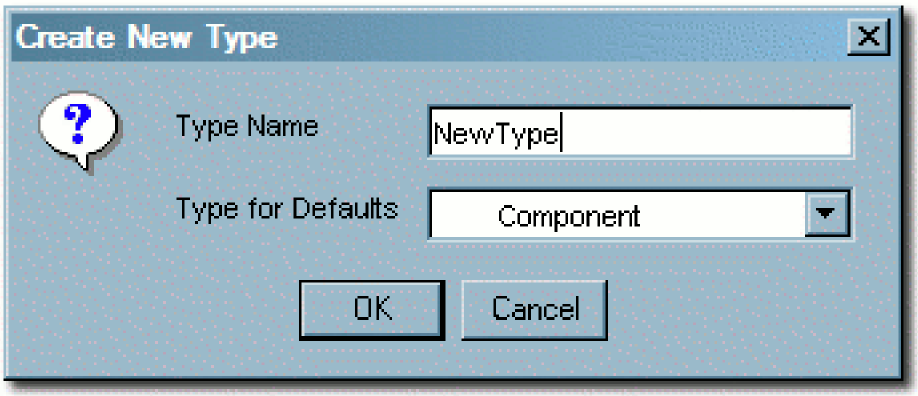
Use Caution! Changes made to Types affect the display of all assets assigned to that type.

Creating a New Type

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 to open the **Create New Type** window.

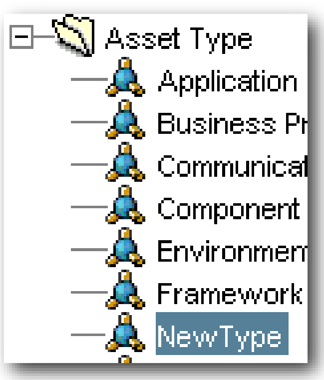


2. Enter the appropriate information in the **Type Name** text box.

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.



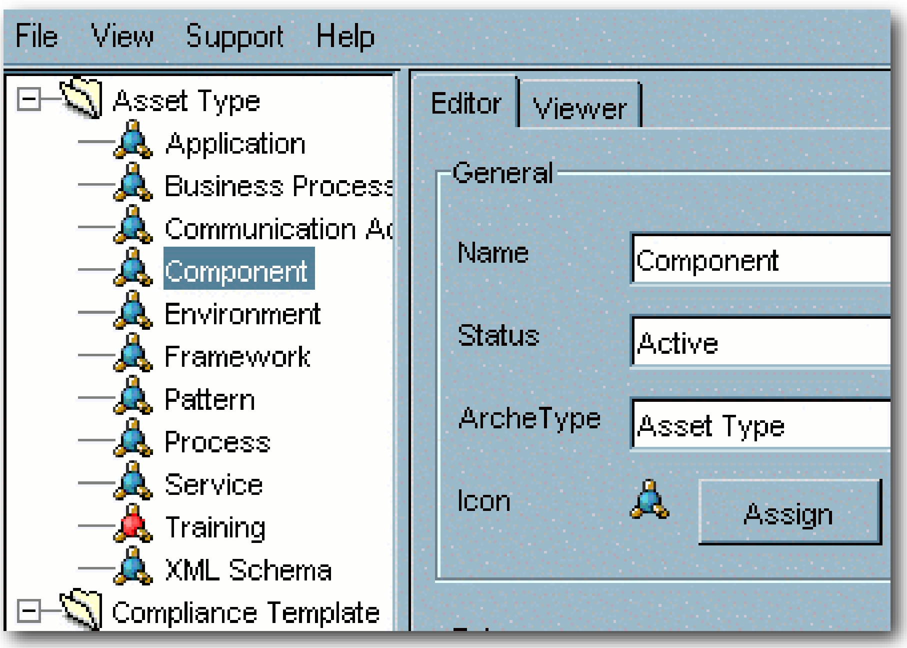
Configuring Tabs to Support Registration Workflow

Overview

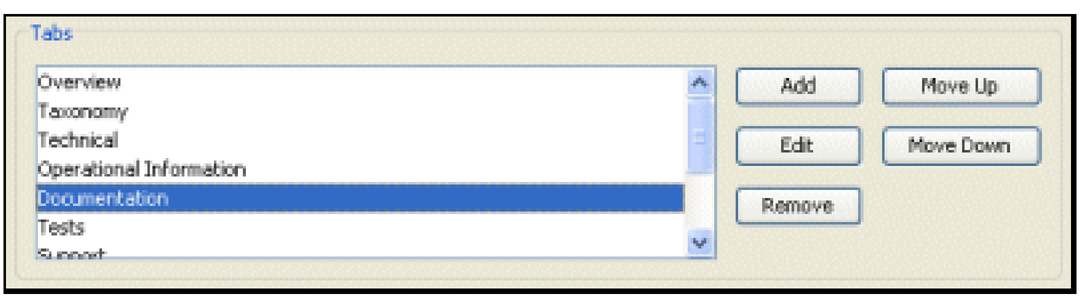
Tabs should be positioned on a Type in a logical sequence that accommodates the registration workflow. For example, in the **Framework** asset type (shipped with BEA AquaLogic Enterprise Repository), it is intuitive to complete the **General** information first. The **Documentation** and **Testing** 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

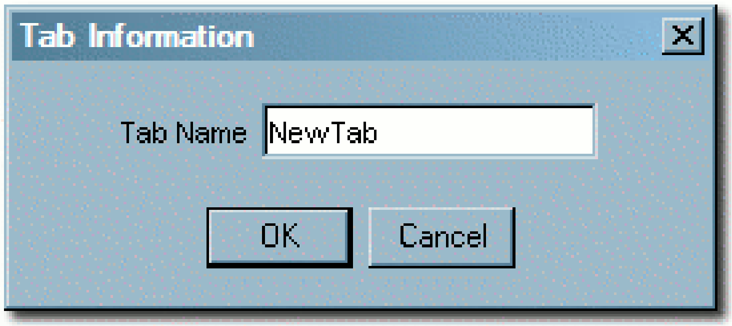
1. Select the Type to be modified.



2. On the **Editor** tab, click **Add** in the **Tabs** section.



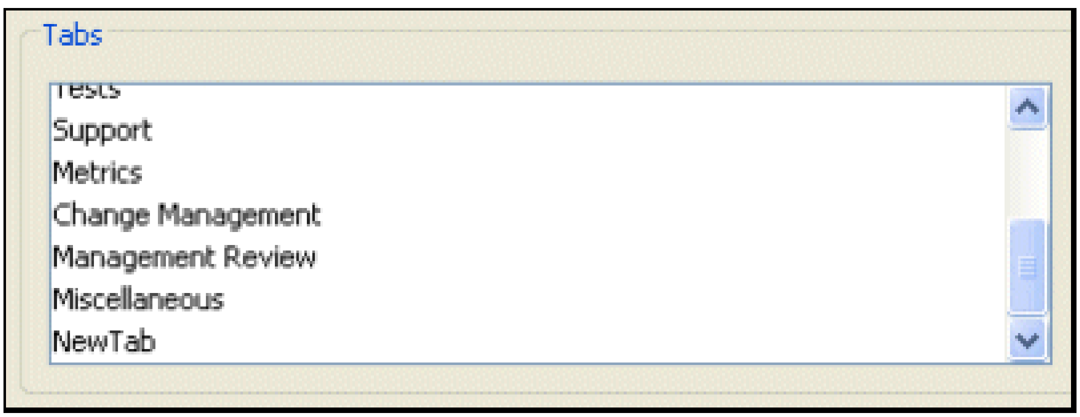
The **Tab Information** window opens.



3. Enter the appropriate information in the **Tab Name** text box.

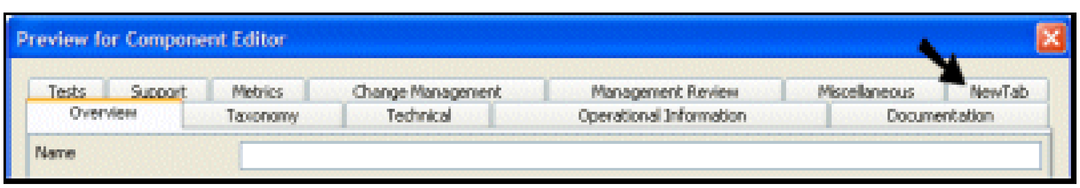
4. Click **OK**.

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



5. Click **Preview** in the **General** section.

   The preview window opens. The new tab is displayed.

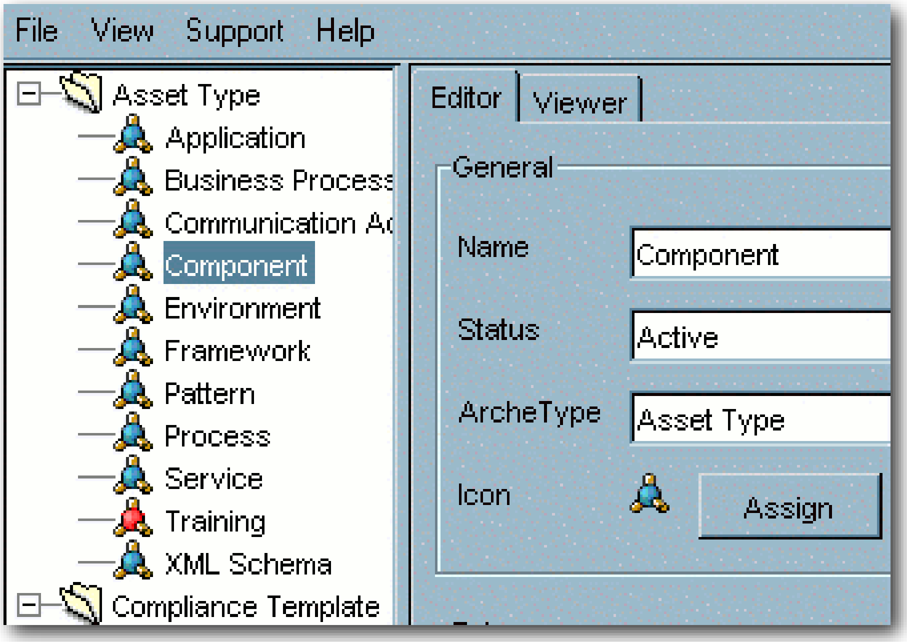


6. Close the **Preview** window.

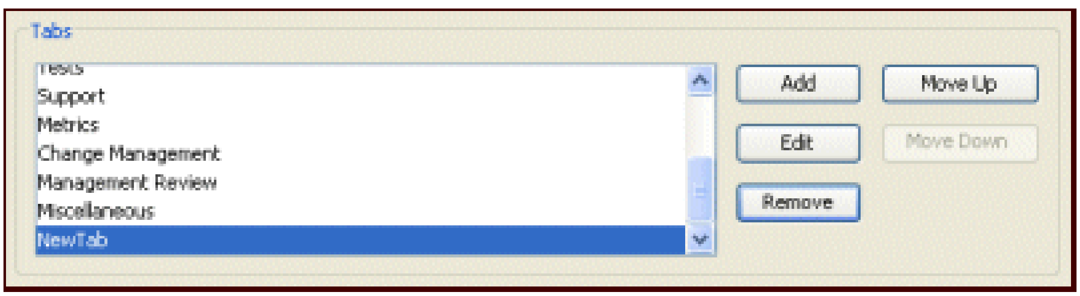
7. On the **File** menu, click **Save** to save the changes.

Change the Position of a Tab

1. Select the Type to be modified.

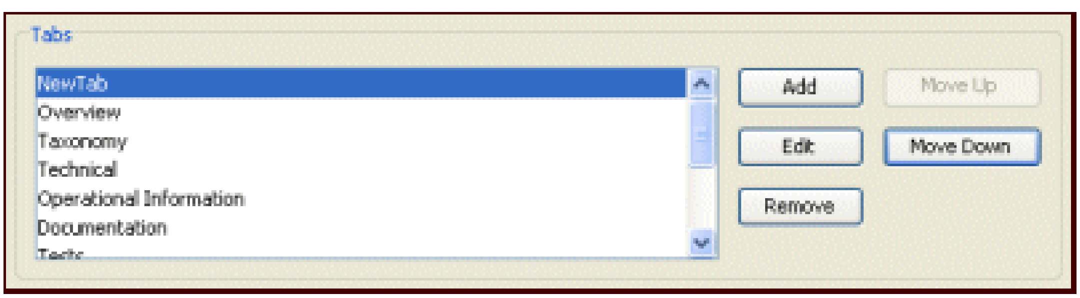


2. On the **Editor** tab, select the tab to be moved.



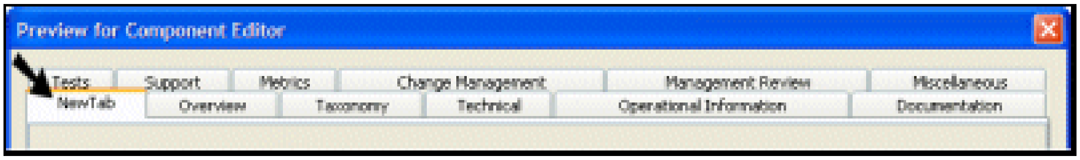
3. Click **Move Up** or **Move Down**, as appropriate.

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



4. Click **Preview** in the **General** section.

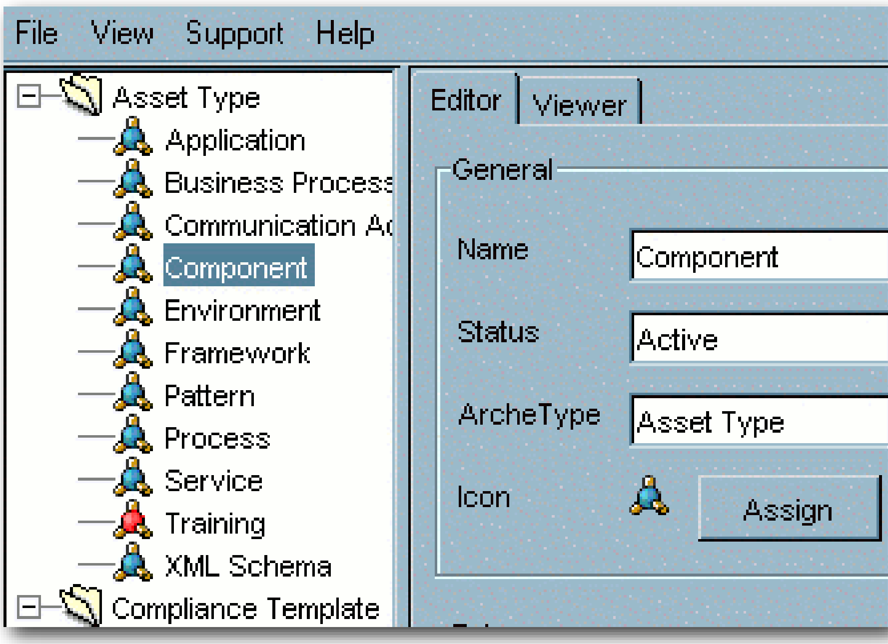
   The preview window opens. Note new position of the tab.



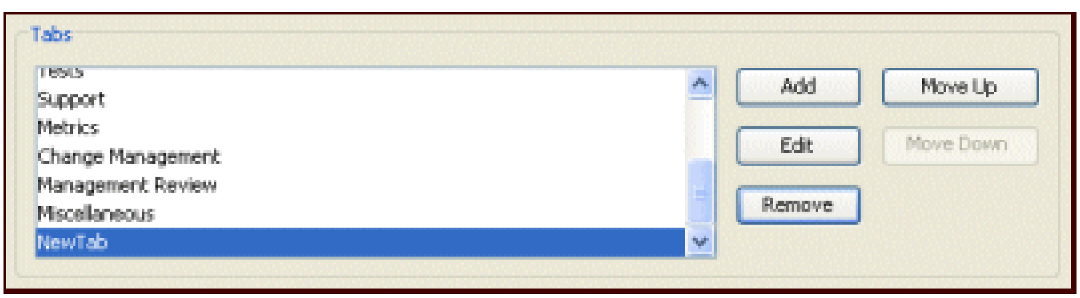
5. On the **File** menu, click **Save** to save the changes.

Editing Workflow Tabs

1. Select the Type to be modified.

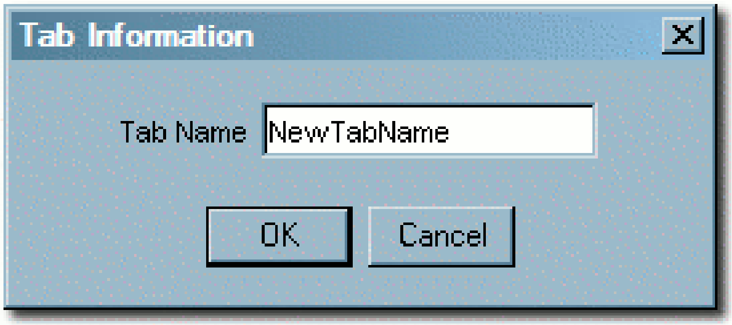


2. On the **Editor** tab, select the tab to be edited.



3. Click **Edit**.

4. Rename the tab.

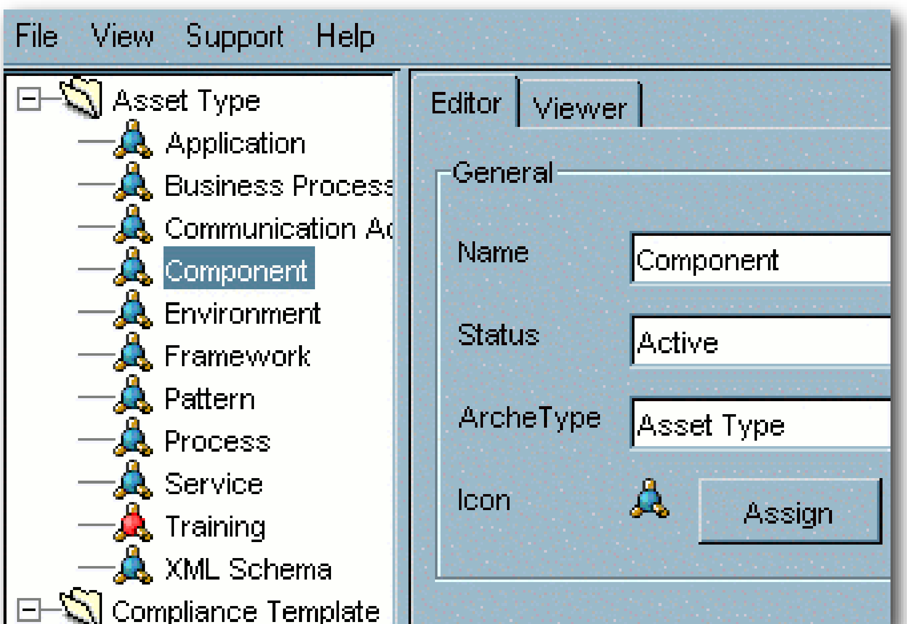


5. Click **OK**.
6. On the **File** menu, click **Save** to save the changes.

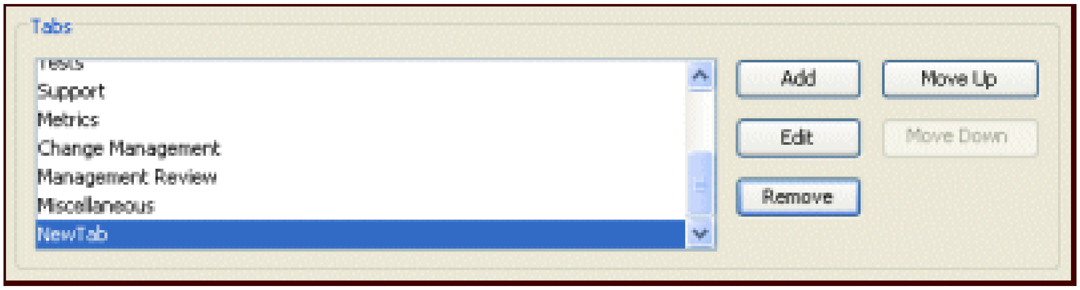
Deleting Workflow Tabs

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

1. Select the Type to be modified.

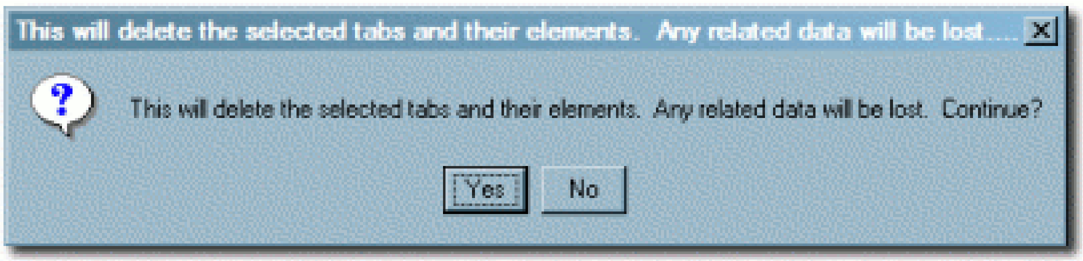


2. On the **Editor** tab, select the tab to be deleted.



3. Click **Remove**.

   A confirmation window appears.



4. Click **Yes**.

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

5. On the **File** menu, click **Save** to 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 More Search Options 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 More Search Options 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 More Search Options 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 More Search Options 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 More Search Options 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 More Search Options 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 More Search Options 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**.

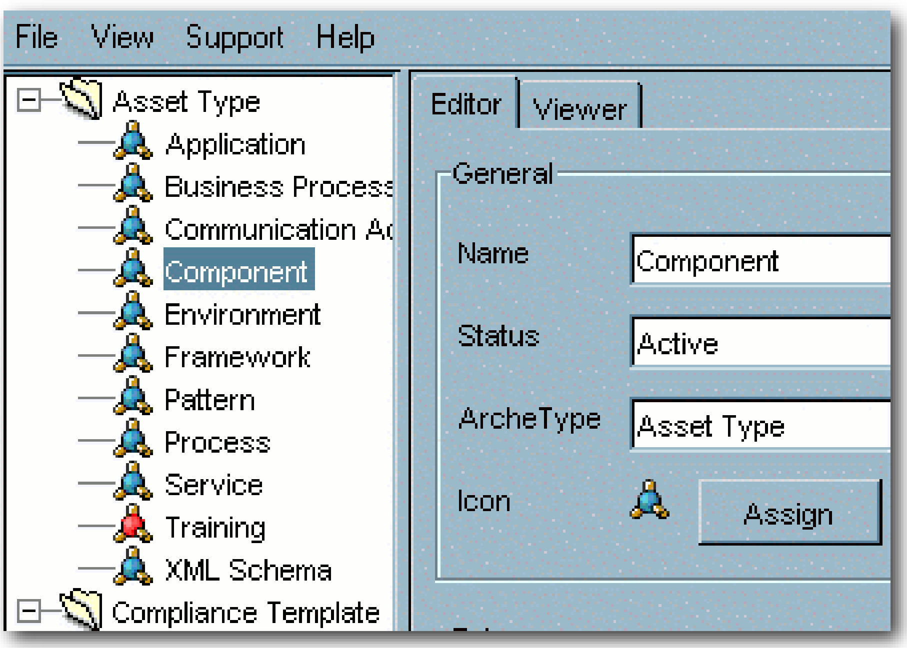
- **Unique Element** -- contains data relevant to the behavior of Unique ID; this can be used only once per type
  - **Display Name**
    - Element label that appears in the **Asset Editor**

- **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**

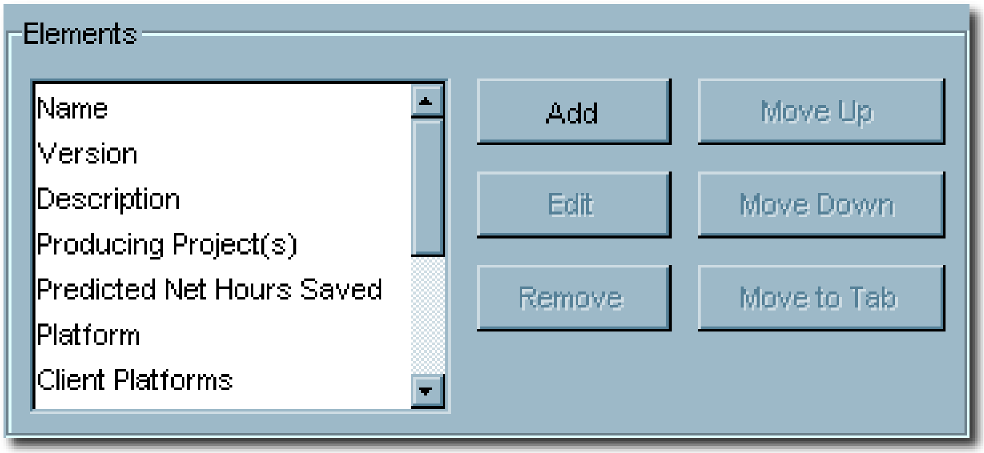
Working with Elements

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.

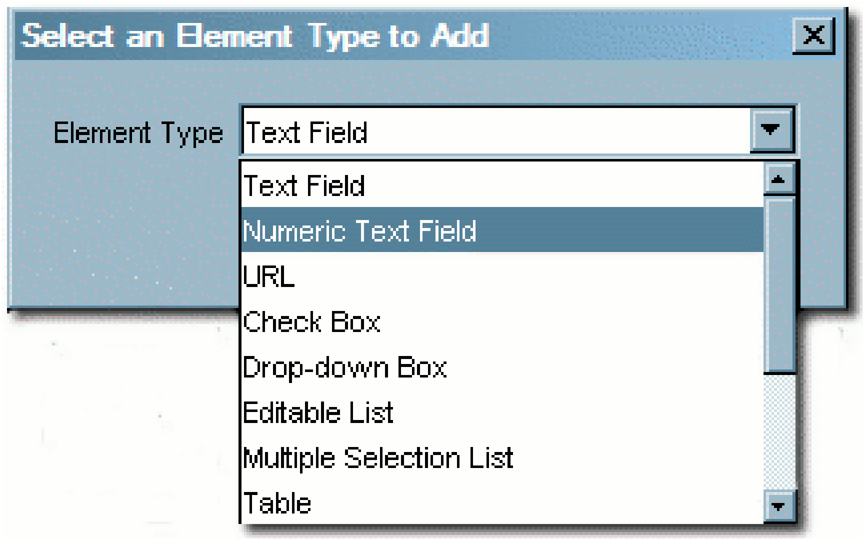
1. Select the Type to be modified.



2. On the **Editor** tab, click **Add** in the **Elements** section.



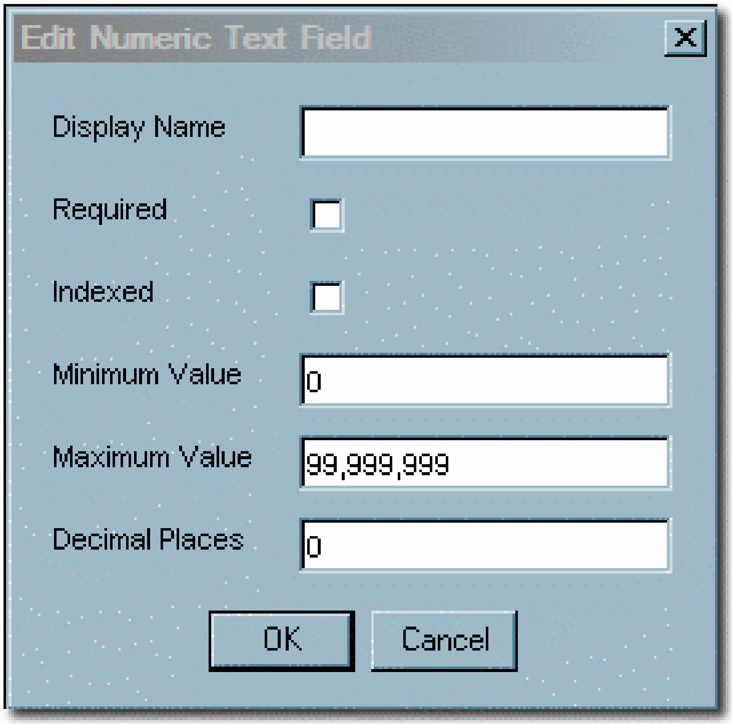
The **Select an Element Type to Add** window appears.



3. Select **Numeric Text Field** from the drop down.

4. Click **OK**.

   The **Edit Numeric Text Field** window opens.



5. Enter the appropriate information in the **Display Name** text box.

6. 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.

7. Check **Indexed** to include the element fields in BEA AquaLogic Enterprise Repository searches.

8. Enter the appropriate information in the **Minimum Value** and **Maximum Value** fields. (See the list above for more information.)

9. 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.

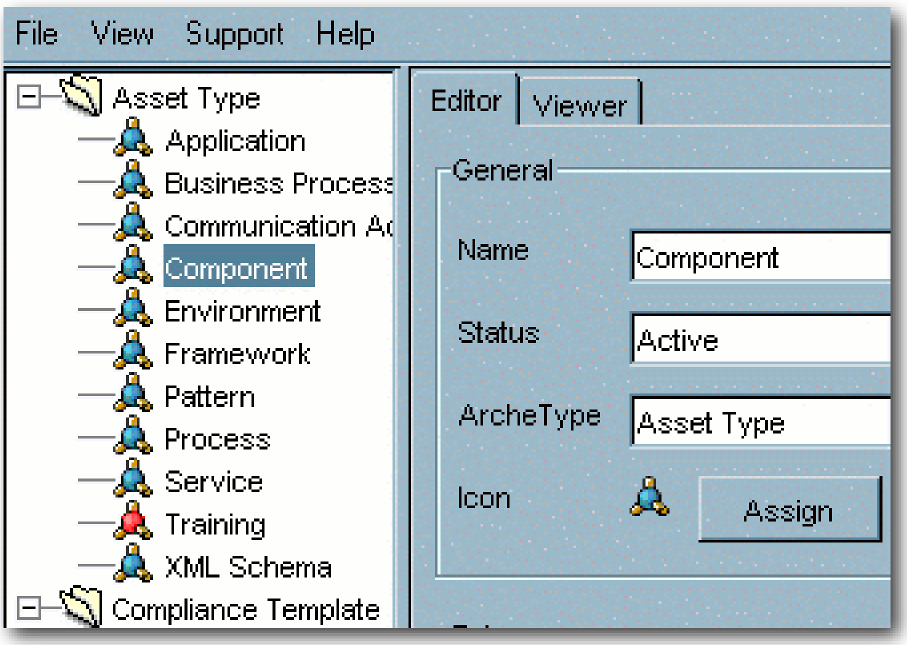
2. Edit `icons.xml` as necessary to add icon elements for the new GIF images.

3. If it is open, close and reopen the **Asset Editor**.

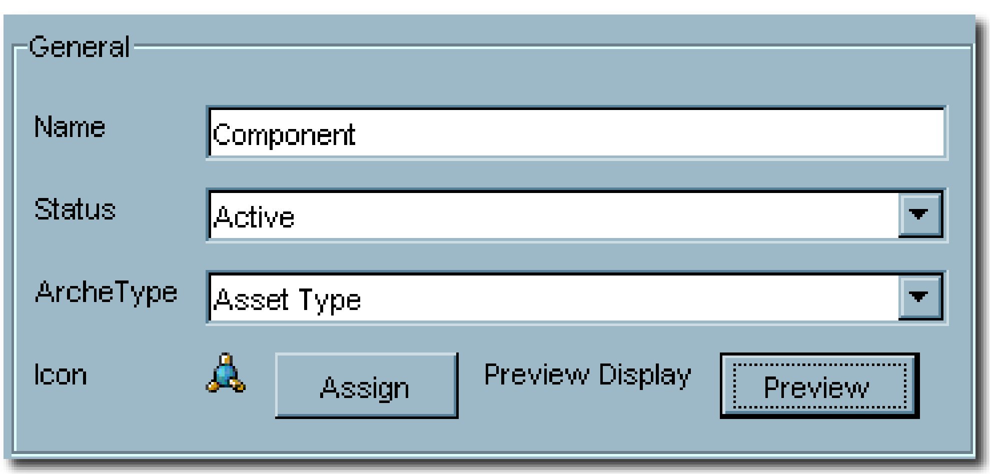
View/select available Type icons

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

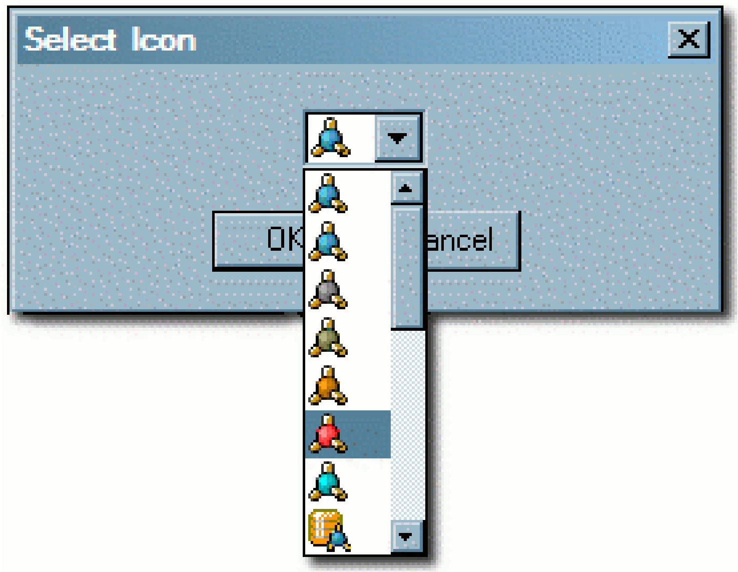
1. Select a **Type**.



2. On the **Editor** tab, click **Assign** in the **General** area.



The **Select Icon** window appears.

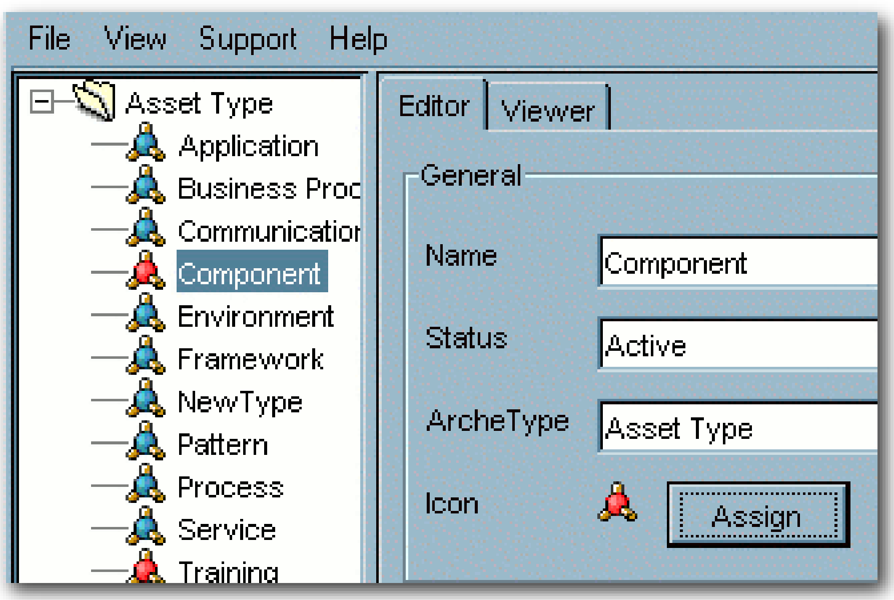


3. Select an icon from the drop-down list.

4. Click **OK**.

5. On the **File** menu, click **Save** to save the changes.

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



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 a error message.

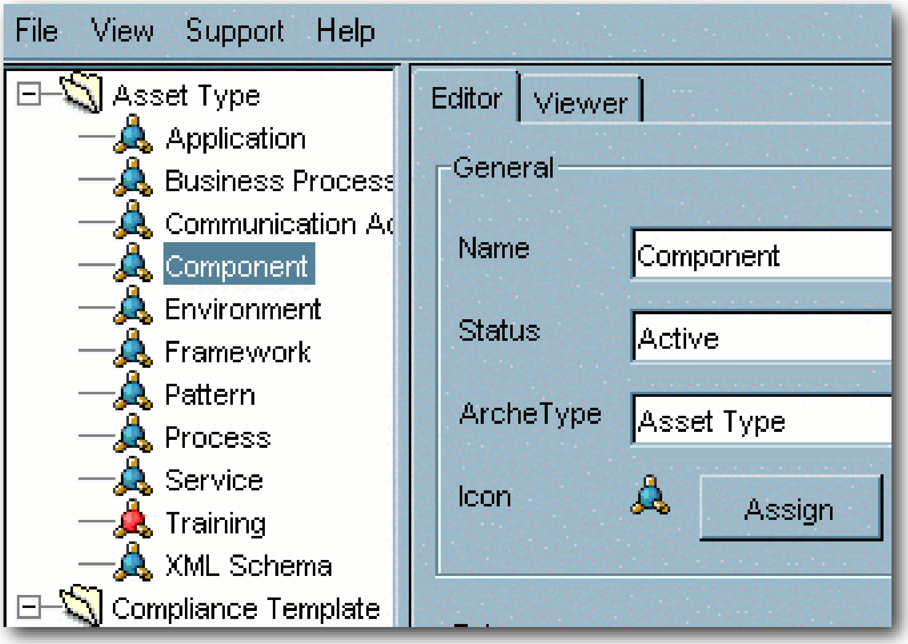
The specific **Type Manager** configuration of the **Unique ID** element determines whether the element and information contained therein is visible to users in the asset detail display for individual assets in AquaLogic Enterprise Repository.

Adding the Unique ID Element to a Type

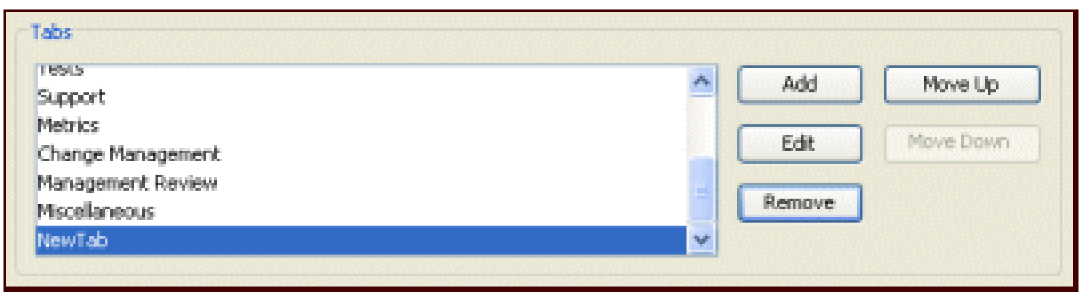
This procedure is performed in the **Type Manager**.

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

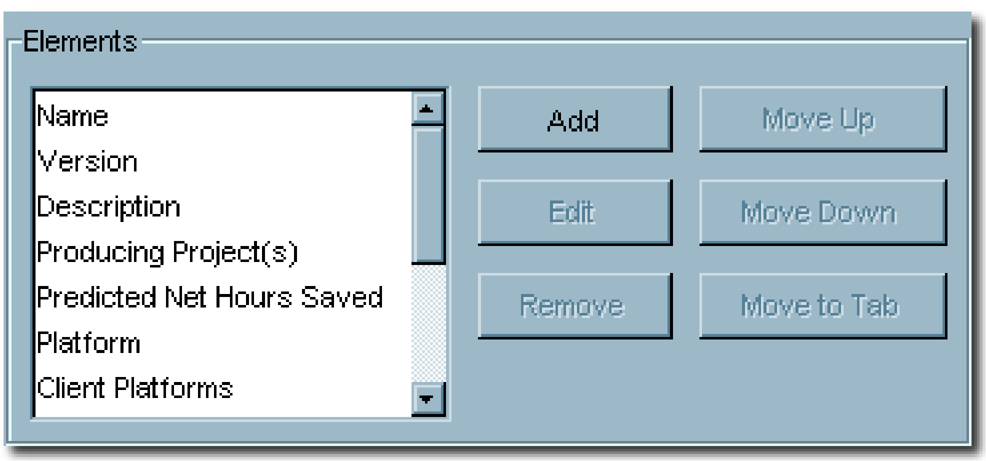
1. Select the Type to be modified.



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

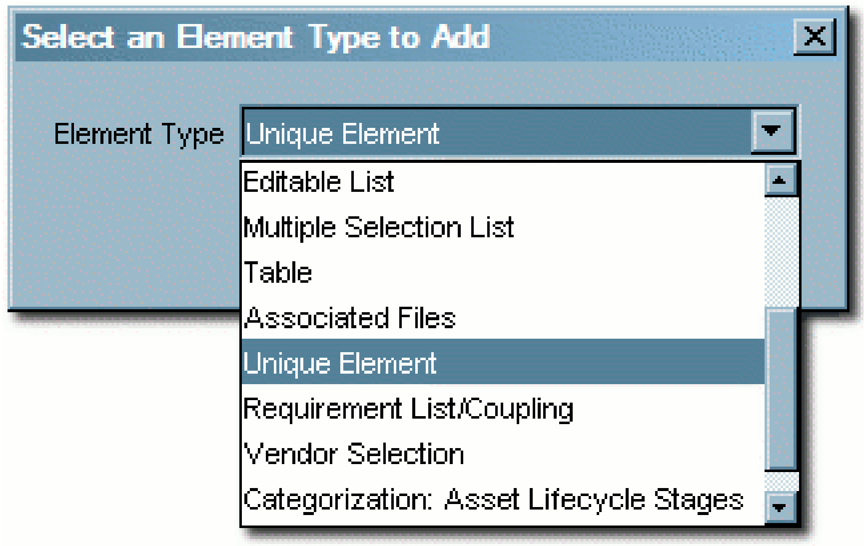


The elements assigned to that tab appear in the **Elements** section.



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

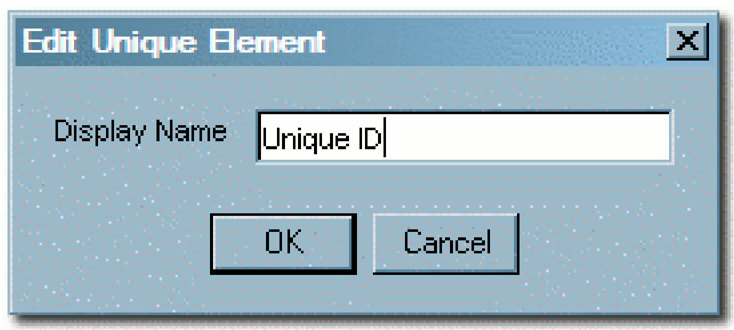
The **Select an Element Type to Add** pop-up opens.



4. Select **Unique Element** from the drop-down.

5. Click **OK**.

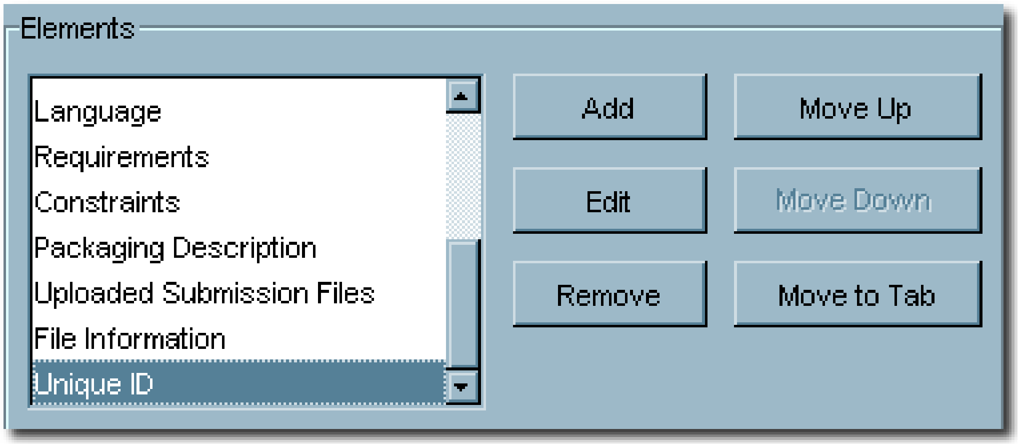
   The **Edit Unique Element** pop-up appears.



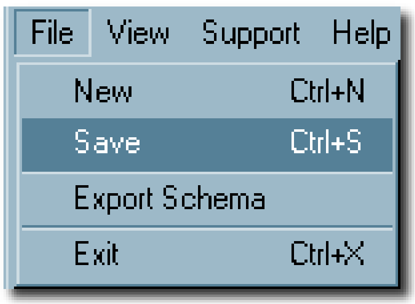
6. Enter the appropriate information in the **Display Name** text box in the **Edit Unique Element** pop-up.

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** assigments 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.

Common Metadata Viewers

There are two elements for Asset Types, Compliance Templates, and Policies that allow users to view XML-formatted metadata that is attached to an asset. One is based on XPath expressions and the other is based on XSLT transformations. Once added to an asset type, the metadata can be viewed in the **Asset Editor** and the **Asset Detail** views. Although the metadata will appear in the asset editor, it is for reference only. These viewers do not make the metadata editable.

XPath Common Metadata Viewer

When added to an asset type you need to specify a Common Metadata type and an XPath. When viewing an asset, if the asset has common metadata of that type, the XPath will be evaluated against the common metadata and the resulting items will be displayed in the asset as a simple list.

XSLT Common Metadata Viewer

These viewers are imported into ALER. Once imported, they appear as elements that can be added to asset types. There is no configuration of the viewer apart from giving it a name. Once added to an asset type, assets of that type that contain common metadata compatible with the viewer will display the metadata as defined by the XSLT of the viewer.

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, Compliance Templates, and Policy Types.

- **Export Schema**
  - Displays the XML schema for the selected type.
  - 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 all types, 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.

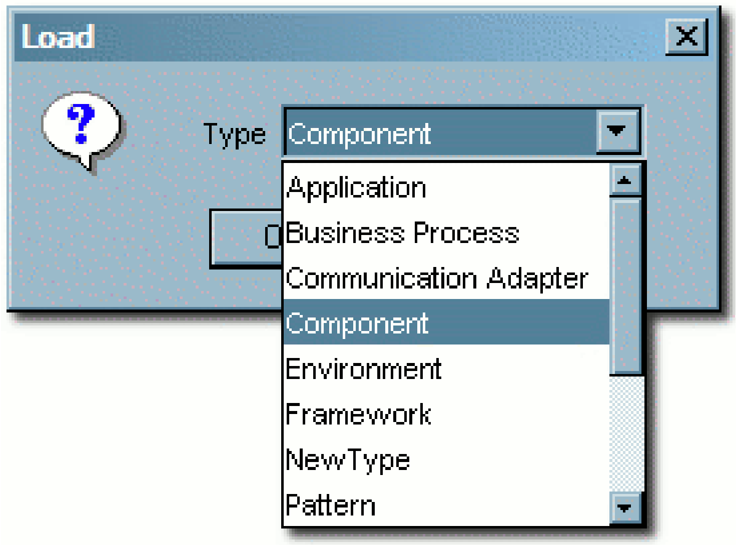
  - If the property `cmee.asseteditor.allow.manual.proxy` is enabled.
    - The manual proxy configuration option will be accessible in the **Support** menu.

Using the Export Schema Feature

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

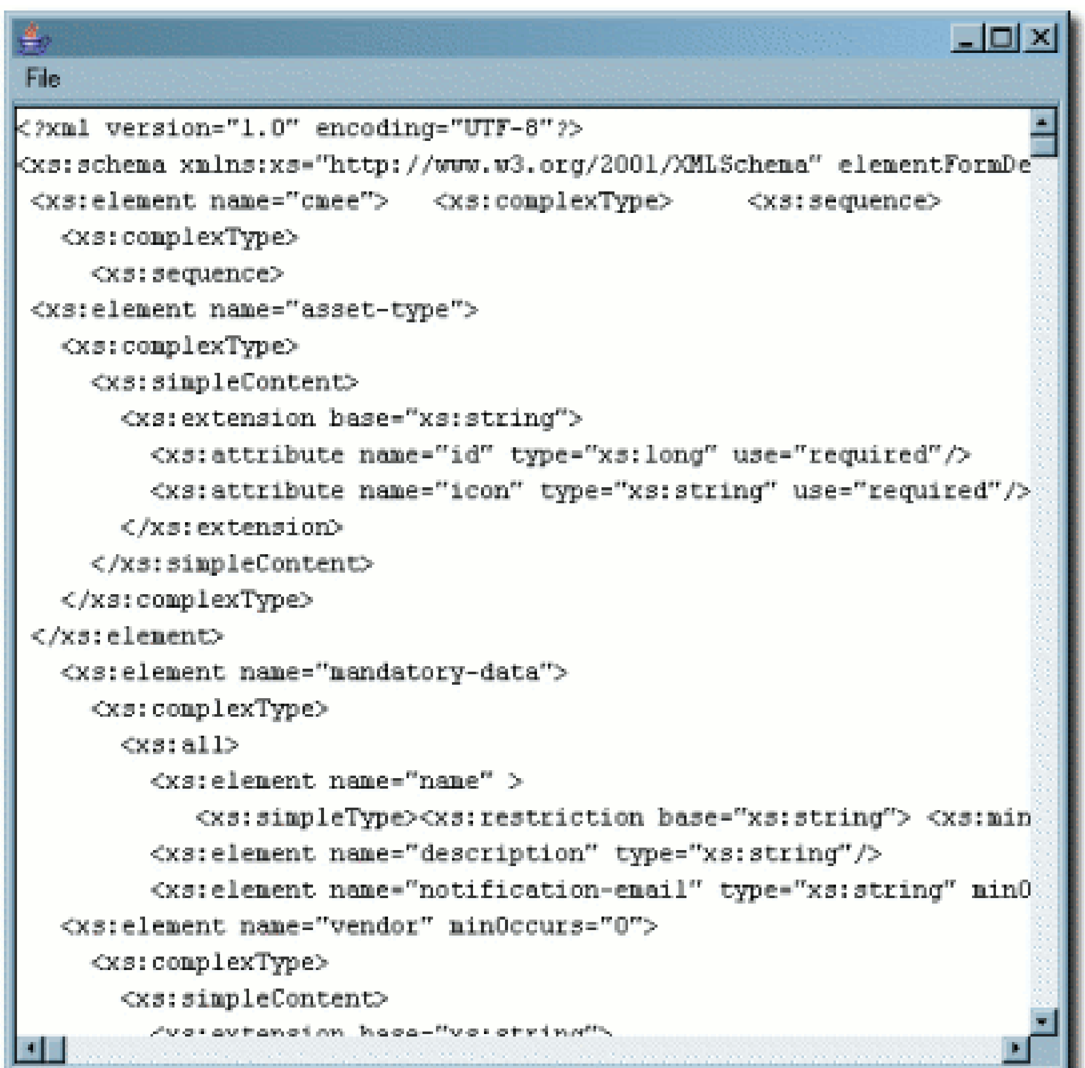
1. Select **Export Schema** from the **File** menu.

2. In the **Load** dialog box select an XML schema type from the **Type** list.



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.)

Note: 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, Compliance Templates, and Policy Types.

Caution! Improper changes to the XML source may render all types inoperable.

1. In the **Type Manager**, select **XML Editor** from the **Support** menu.

   The following warning message displays:

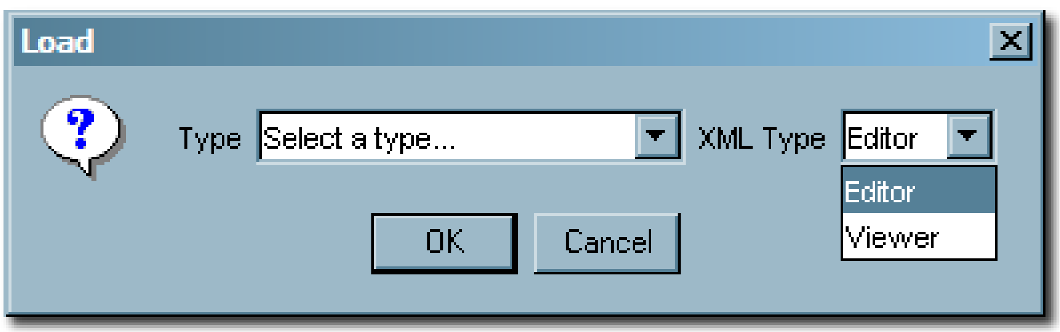
   Changes made in the XML Editor are not validated and may render a Type unavailable!

2. Click **OK**.

   A blank window opens.

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

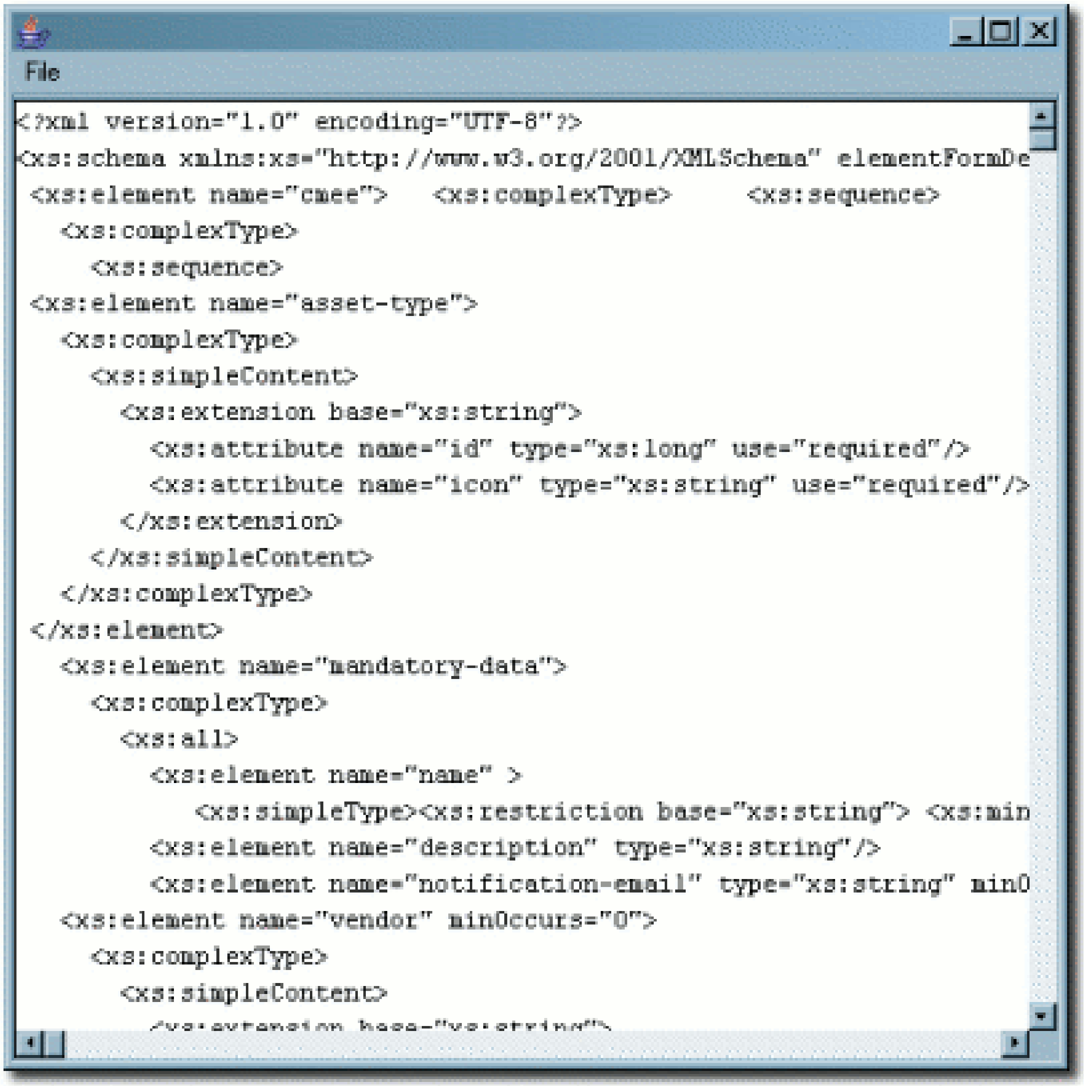
4. In the **Load** dialog box, select the type of XML schema to be edited from the **Type** list.



5. Select **Editor** or **Viewer** from the **XML Type** list. 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 by selecting **Save** on the **File** menu.

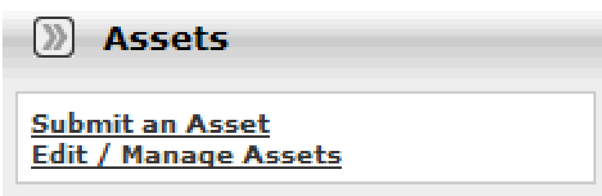
Assets in Progress

Overview

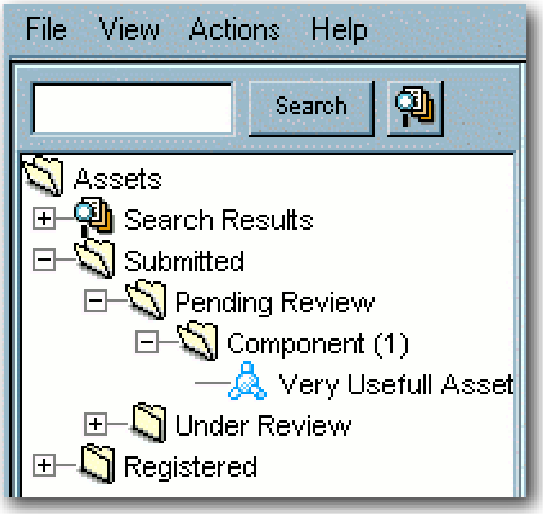
AquaLogic Enterprise Repository's **Assets in Progress** feature allows users to track the progress and availability of assets still in development. This allows organizations to realize compound gains in productivity by engaging asset producer, consumer, and maintenance teams in a collaborative process to increase the value of the asset portfolio in the natural course of software engineering. This feature helps organizations eliminate redundant development before it occurs. By exposing assets that are still in development, projects can include the use of these assets in their project plans, rather than wasting time and effort on redundant development.

Assets in progress appear in AquaLogic Enterprise Repository as **Unregistered** assets. The actual **Registration Status** of any asset in progress (as indicated in the **Status** column in search results and in the asset detail) is determined during asset submission.

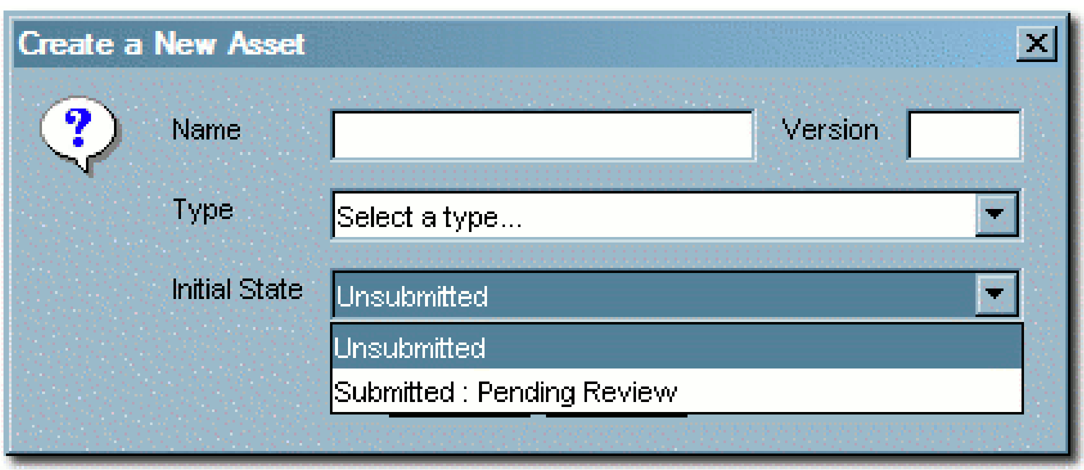
When the **Assets in Progress** feature is enabled, any assets submitted via the **Submit an Asset** link on the AquaLogic Enterprise Repository **Assets** screen are automatically assigned the **Unregistered** status. They will appear in searches filtered for **Unregistered** assets.



Assets submitted via **Submit an Asset** enter the **Submitted - Pending Review** folder in the file tree in the **Asset Editor**.



Assets submitted via the **Asset Editor** may be designated as **Unsubmitted** or **Submitted - Pending Review** in the **Initial State** drop-down menu.



Assets in either state enter ALER as **Unregistered** assets, and will appear in searches filtered for **Unregistered** assets.

Viewing Assets in Progress

Display a list of all Assets in Progress

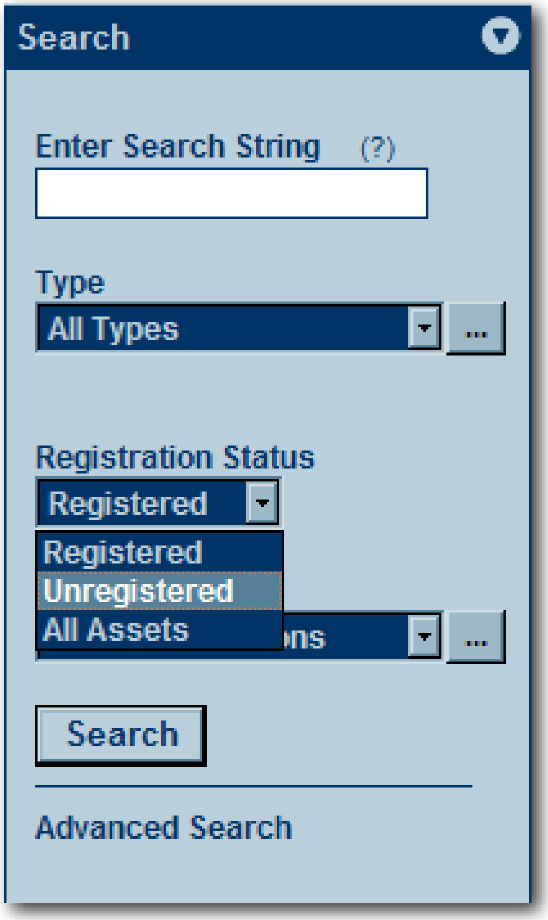
This procedure is performed on the AquaLogic Enterprise Repository **Assets** screen.

1. Leave the **Enter Search String** text box blank.

2. Select **All Types** in the **Type** drop-down.

3. Select **All Asset Functions** in the **Asset Function** drop-down.

4. Select **Unregistered** from the the **Registration Status** drop-down menu.



5. Click **Search**.

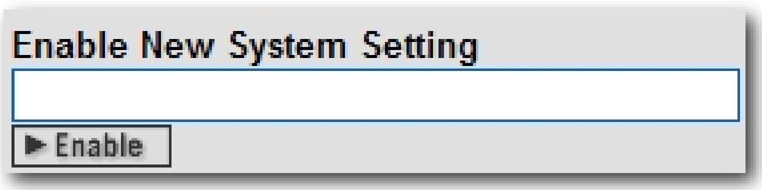
   A list of all **Assets in Progress** will be displayed in the upper frame of the main pane.

Enabling Assets in Progress

Two properties must be enabled in order to activate **Assets in Progress**. This procedure is performed on the AquaLogic Enterprise Repository **Admin** screen.

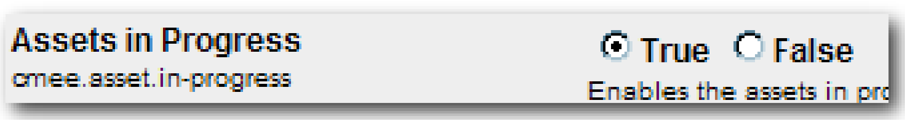
1. Click **System Settings** in the left pane.

    1. Enter the property `cmee.asset.in-progress` in the **Enable New System Setting** text box.



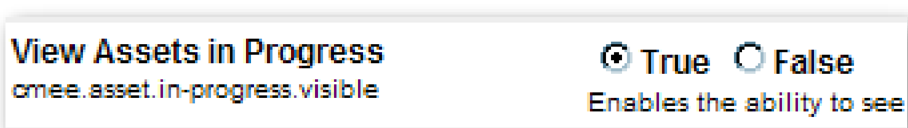
2. Click **Enable**.

    Assets in Progress appears in the list of settings in the main pane.



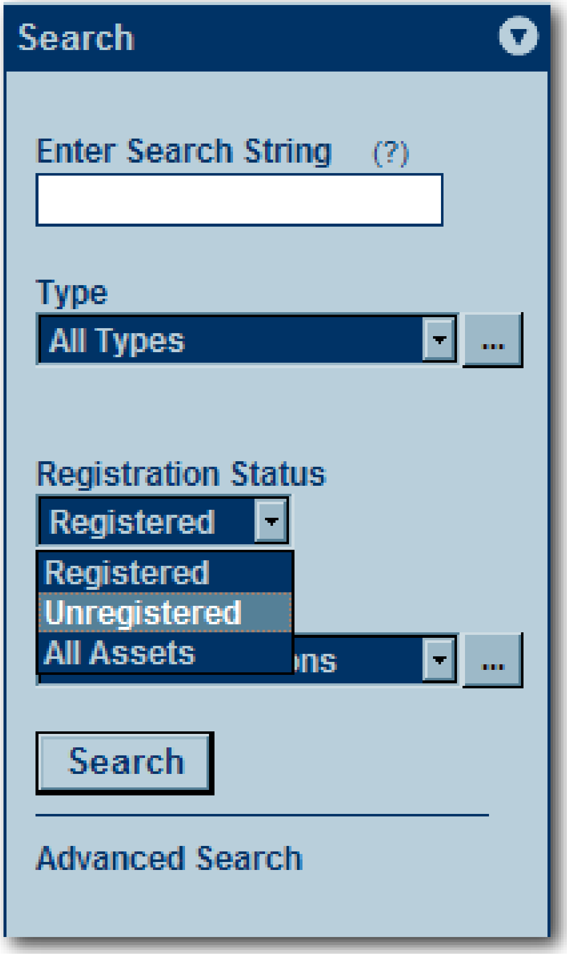
3. Make sure the property is set to **True**.
4. Click **Save**.
5. Enter the property `cmee.asset.in-progress.visible` in the **Enable New System Setting** text box.
6. Click **Enable**.

    View Assets in Progress appears in the list of settings in the main pane.



7. Make sure the property is set to **True**.
8. Click **Save**.

The **Registration Status** drop-down menu will now appear in the **Search** section on the AquaLogic Enterprise Repository **Assets** screen.



Disabling Assets in Progress

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

Note: Disabling the **Assets in Progress** feature prevents **Asset Editor** access to assets in the **Unsubmitted** state. Assets in the **Submitted - Pending Review** state will remain accessible to the **Asset Editor**. Before disabling **Assets in Progress** it is recommended that all necessary assets be promoted from **Unsubmitted** to **Submitted - Pending Review**.

1. Click **System Settings**.
2. Locate **Assets in Progress** in the list of settings in the main pane.
3. Set the **Assets in Progress** property to **False**.
4. Locate **View Assets in Progress** in the list of settings in the main pane.

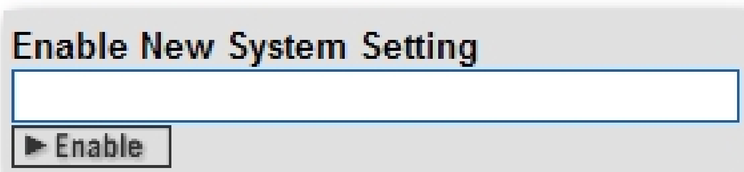
5. Set the **View Assets in Progress** property to **False**.
6. Click **Save**.

Enabling Viewing of Assets in Progress Through an IDE

The AquaLogic Enterprise Repository **Open API** (part of the **AquaLogic Enterprise Repository Extensibility Framework**) makes it possible to enable viewing of both registered and unregistered assets in search results through an IDE.

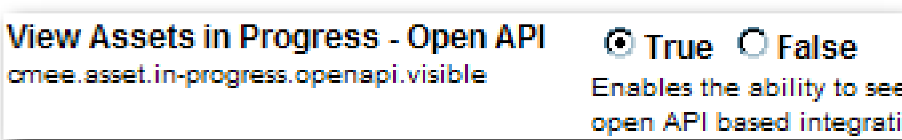
Assuming this option is included in your installation of AquaLogic Enterprise Repository, the necessary property can be enabled through the following procedure, performed on the AquaLogic Enterprise Repository **Admin** page:

1. Click **System Settings** in the left pane.
2. Enter the property `cmee.asset.in-progress.openapi.visible` in the **Enable New System Setting** text box.

3. Click **Enable**.

   View Assets in Progress - Open API appears in the list of properties in the main pane.

4. Make sure the property is set to **True**.
5. Click **Save**.