

BEAAquaLogic® Enterprise Repository

Registrar Guide

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Advanced Asset Submission

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

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

The Create a New Asset pop-up opens.

Create a New A	sset 🔀
Name	Version
Туре	Select a type
	OK Cancel

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



The new asset appears in the Asset Editor.

Swatch R	Accent Type :	Component				
Search Results	Data mentation Overview	Melefinanthing	Texts Suppor Texonomy	t Metrica	Macalansous Archite	Administration acture
B-Q Component (D+)	Nersion	MyAsset				
Construction (1)	Description					
⊞-Q Support (1) ⊞-Q Metrico (1) ⊞-Q Metrico (1) ⊕-Miscellaneous (1)	Producing Project()	0				Add
	Predicted Net Hours ! Platform	Saved (0.00		1 [
	AS400 J2EE LINUK	1				

The asset is submitted for review and registration.

The Registration Process

- Overview
- Understanding the Registration Process
- Automated Asset Registration Using Advanced Registration Flows
- Accepting a Submission
- Registering an Asset
- Completing the Tab Approval Process
- Administration Tab
- Audit Log, Reviews, and Notes

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**.



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

- $_{\rm O}~$ 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.

Search 👰	Name	New Asset
Assets	Version	1.0
Search Nesults	Time	
Dandon Daview	Type	Component
Concorrect (2)	Description	The second second
- A Mary Asset (1 0)	Description	An enample asset.
-A New Areat (1.0)	Constraints and the	
E-S Under Review	A CONTRACTOR	
E-S Component (0+)	Submitted By	Rhubart, Bob
- S Overview (1)	A REAL PROPERTY OF	
MyAsset (1.0)	Submitted Date	24 Feb 2006 03:24:20 PM
E-S Taxonomy (1)	State State	
III- Architecture (1)	Conments	÷
E-Q Documentation (1)	Contraction of the	
Relationships (1)	Contraction of the	· ·
Image: Tests (1)	Location	http://www.
		The second
⊞-S Metrics (1)	Producing Projects	
- Miscelaneous (1)	ALL PROPERTY AND A	Add
Registered		
Application Adapters (2)		Delete
Customer Information Acquis		Competences of the second seco
B-geCommerce Frameworks (3)		
H- Geographic Address Locato		The second se
Governance (1)	Actions	tunt tunt mittain shut
The Street Pathware Manifester	Contraction of the	Accept and Assign Melled
an Successed Software Moneon	The second second	

- 4. Options:
 - o 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**.

o 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.

Relationshins Tests Overview Ta	Support Metrics Miscellaneous Administration xonomy Architecture Documentation
Name	New Asset
Version	1.0
Description	An example asset.
Producing Project(s)	Add Delete
Platform	
NET AS400 J2EE LINUX	× 22
Client Platforms	

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

Overview		
Approved By:	Approved Date:	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.

Relationships Overview	Tests Support	Metrics Miscellar Architecture	neous Administration
Classification			Assign
Asset Function			Assign
Domains			Assign

Several Categorizations are displayed.

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

The Assign Classifications pop-up opens.

A	ssign Classific	ations
	Assigned?	Name
		-S Approved Selucational -S Mandated -S Raw -S Recommended
		OK Cancel

- 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.

\circ 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.

Keywords
keyword1
keyseverd2
Add Delete

Add other keywords as necessary.

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

Taxonomy		
Approved By:	Approved Date:	Approve
		Hereit Constant and Constant of Constant

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

Documentation Tab

1. Click the **Documentation** tab.

Relationships Tests Support Metrics Miscellaneous Administration Overview Taxonomy Architecture Documentation				
Documentation				
Name	URL	Appro	Requi	Add
Certification Plans				
Configuration Guidelines			✓	Edit
Design Document				
Development Coding Guid				Approve
Installation Guidelines				
Localization Guidelines				Delete
Maintenance History				Delete
Documentation				
Approved By:	Appr	oved Date	8:	Approve

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.

Edit		\mathbf{X}
Name	NewDocument	
URL	Edit	
	OK Cancel	

- 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.

Edit URL	
🔾 Artifact Sto	re File
Store	Select a store 🗸
Path	
File Name	Browse View
💿 External Fil	8
URL	Test
Note: Use an a	bsolute URL including the protocol, for example "http://"
	OK Cancel

- 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.

Name	URL	Appr	Requ		Add
Programmer's Reference			N.		
Release Notes				_	Edit
Sample Code			2		Euli
Specifications/Guidelines					
Upcoming Version/Featur					Approve
User Guide					
NewDocument	http://N			-	Delete

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

Documentation		
Approved By:	Approved Date:	Approve
Events of the second states of the second		

Relationships Tab

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

efine Relationship	
Asset (1.0)	
Relationship Type Next versi	an is
ind Assets To Relate	
A	ctive 💌 Search List All Active
	Asset
Sample Application - ACES	
Sample Application - Commerc	ial Card Authorization System
Sample Business Process - O	rder Verification Process (1.0)
Sample Comm Adapter - Custo	mer Credit Information (3.0)
Sample Component NET-Find	Address Method (Beta Release)
Sample Component J2EE - Ord	er EJB (2.0)
Sample Environment - Tomcat	(4.1)
Sample Framework - Struts (3	2)
Sample Pattern - Front Control	er Design (1.0)
Sample Pattern - MVC Design	(2.0)
Sample Pattern - View Helper	Design (1.0)
Sample Process - SCRUM (2.0	0
Sample Project Profile - Purcha	se Request Tracking System (1.0)
Sample Service - Account Det	all (dynamic) (2.0)
Sample Service - Account Det	ail (static) (1.0)
Sample XML Schema - MARC ((1.0)
Training Asset (1.0)	
ontirm Relationship	
Asset (1.0)	
"Next version is"	
Training Assat	(1.0)
Italining Assec	(1.0)
	Day www. Dalationation
	neverse nelationship
President Acres (1. 6)	
reathing Asset (1.0)	
"Previous version	15"
Asset (1.0)	
	And the second secon

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**.

Relationships		
Approved By:	Approved Date:	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
 - $_{\circ}$ Inactive
 - o Retired
 - $_{\circ}$ Deleted
- View asset notes and reviews.
- Complete the registration process by clicking the **Register** button.

Overview Relationships	Taxonomy Tests Support	Architect Metrics	ure Miscellaneous	Documentation Administration
Created Created By: Rhub	art, Bob 🖂	Created Date:	24 Feb 2006 03:2	24:20 PM
Submitted Submitted By: Rhu	ibart, Bob 🗹	Submitted Date	: 24 Feb 2006 03	3:24:20 PM
Accepted Accepted By: Adr	ninistrator, ALER	Accepted	iDate: 27 Feb 20	106 01:07:42 PM
Assign Users				
Assigned	То	Assigned Date		Add
Smith, John 🔛	28 Feb	2006 04:43:53 PM		Delete
			Email	Assigned Users
Registered				
Registered By:		Registered Date:		Register
Notification				
Notify Subscribers				
Status Active				•
Type Component				
Logs				
Votes V Re	eviews			Refresh
Submitter	Date	Туре	Comments	View
Administrato 🖂	28 Feb 2006	Note	This is a note	
			in the second second	

A registered asset can include unapproved tabs.

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.

Add a Note for New Asset (1.0)	×
(?) A note on this asset.	
OK Cancel	

- 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.

nfigure Acceptable Value Lists	
Acquisition Method	Add
Application Server	
Approved Parsers	Edt
Author	
Certifications	
Client Platforms	
Communication Methods	
Communication Models	
Control Characteristics	
Cost Categories	
Currency	
Database	
Downtime Impact	
Drivers of Change	
Extent	
Frequencies	
Frequency of Change	-1
[OK]	

2. Click Add

The Add Acceptable Value List window opens.

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

Add Acceptable Value List	×
List Name MyList	
Item 1	Delete
	Edit
ttem 2 Add	
OK Cancel	

- 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.

Configure Categorizations		×
Asset Functions	Add	1
Asset Lifecycle Stages		
Business Objectives	Edit	
Classifications		
Domains	Delete	
Lines Of Business		
Technologies		
TOKI		
Landard		

2. Click Add.

The Add Categorizations window opens.

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

Auto Categorization	
Element Name (no spaces)	1
Singular Display Name	
Plural Display Name	
tModel Key v2	
tModel Key v3	
	Mutually aschusiv

Add Catogori

Singular Display Name		
Plural Display Name		
tModel Key v2		
tModel Key v3		
	Mutually exclusive assignment?	
(65)	Assignable to projects?	
0		Add
		Edit
		Deactivate
		Delete
	OK Cancel	

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.
- 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 <u>Automated Web Services</u> <u>Guide</u>.
- 7. Click Add to add sub-categorizations.

IIZalivii				_ ×I
	OK	Cancel		
		OK	OK Cancel	OK Cancel

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.

Add Relationsh	ip X
Element Name	
Direction	Two-way, order matters
Source Asset	Target Asset
Target Asset	Source Asset
🔽 Make targe	t assets available for download with the source asset.
	OK Cancel

(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.

Does not meet requirements	Add
mmature technology	and the second s
ncompatibility	Edt
nsufficient documentation	
Legal / Licensing	Deactivate
Other	
Performance	
Project timing	
Reliability	
Research Only	
Risk	
Scelebility	
System resource requirements	
Jsabilty	

2. Click Add.

The Edit Rejection Reasons window opens.

Edit Rejection Reason	
? Rejection Reason	
ОК	Cancel

- 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.

Configure Artifact Stores	×
ALER_CVS HTTP	Add
OK	

2. Click Add.

The Create a new Artifact Store window opens.

Create a new Artifact Store	$\overline{\mathbf{X}}$
Name	UNC
Туре	UNC
Hostname	aler
Path	upload/
Username	Myname
Password	******
URL	file:////aler/upload/
Proxy Download Requests	
	OK Cancel

- 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.

Configure Vendors	×
Vendor 1	Add
Vendor 2	
Vendor 3	Edit
	Delete
OK Cancel	

2. Click Add.

The Add Vendor Name window opens.

Add Vendor Name	×
Name	
	OK Cancel

- 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.

Migrated Asset (1.0)	
Asset Type : Compor	nent
Tests Support Me Overview Taxonomy	trics Miscellaneous Administration Architecture Documentation Relationships
Name	Migrated Asset
Version	1.0
Description	THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. Order EJB provides the ability to view the Interview the Interview the

6. Click the new asset's Administration tab.

Tests Support Metrics Miscellaneo	us Administration			
Created	_			
Created By: User, Joe 🖂 Created Date:	15 Feb 2006 02:1			
Submitted				
Submitted By: Smith, John 🗹 Submitted Date: 15 Feb 2006 02:				
Accepted				
Accepted By: Smith, John 🖂 🛛 Accepted Date	8: 15 Feb 2006 02:			
Assign Users				
Assigned To Assigned Date	Add			
	Delete			
Ema	all Assigned Users			
Registered				
Registered By: Registered Date:	Register			

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

 $_{\odot}$ 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.

<u> </u>	Migrated Asset (1.0)
2	Asset Type : Component
Overvi	ew Taxonomy Architecture Documentation Relationshins
16313	Support Metrics Miscellarieous Hammindration
Status	Active
	Active
Type	Inactive
ll ⊨Logs:	Retired
	Deleted

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
	1
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
Dopondo Op	A Depends on R
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.

http://localhost:7101 - Use - Download - Mozilla Firefox	
Use - Download	
Sample Application - ACES	
Please Choose a Project 💌	
Subscriptions for Sample Application - ACES Send me information updates about this asset. Assets Related to Sample Application - ACES Use Depends on	
Sample Comm Adapter - Customer Credit Information (3.0)	
Send me information updates about this asset.	
Next Cancel	
Done	

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.

Relationship	Asset
Part of projects	Expense Service (1.0)

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.

Configure Relationships	X
Subject to / Applied to Applied Policies / Assets Applied To Contained in / Contains Depends on Functional Equivalent of Implemented by / Implements Previous version is / Next version is Services in project / Part of projects Asset Prescribed by / Prescribed Asset(s) Environment Prescribed by / Prescribed Environment(s) Process Prescribed by / Prescribed Process(es) Provides Business Service / Provided by Business Entity Referenced by / References Related to Runs on / Runs Similar to Uses	Add Edit Delete
OK	

- 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.)

Edit Relationship				
Element Name	ALBPMProject			
Direction	Two-way, order matters	~		
Source Asset	Services in project	Target Asset		
Target Asset	Part of projects	Source Asset		
Make target assets available for download with the source asset.				
System-supplied relationship (read only)				
OK Cancel				

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.

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

3. Click the Add button.

The Edit pop-up opens.

			Ec#
Avelate Access Settings		Selected	
	View Access		
		1	

- 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.

Edit URL		×
🔾 Artifaci	t Store File	
Store	Select a store	
Path		
File Na	me Browse View	
💿 Externa	al File	
URL	Test	
Note: Use	an absolute URL including the protocol, for example "http://"	-
🔵 Text Fi	ile	
Type Se	elect a type	7
File		1
	OK Cancel	

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

o 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.

o 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.

Configure Artifact Stores	\mathbf{X}
ALER_CVS HTTP	Add Edit
OK	

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

Edit Artifact Store		
Name	LOCALHOST	
Туре	HTTP	
Hostname	localhost	
Path	1	
Username		
Password		
URL	http://localhost/	
Proxy Download Requests		
OK Cancel		

- 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**.

Edit URL		×
 Artifact Stor 	e File	
Store	SAMPLE	~
Path	**password**@download.example.com/priva	te/
File Name	Class Library Browse	View

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.

Producing Projects	
	Add
	Delete

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.

Add Producing Projects		
		Search List Al
Common Project Registry	>>	
	OK Cancel	

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.

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

Producing Project(s)	
Big Project	Add
	Delete

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

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

Producing Project(s)
Producing Projects: Example Project

Using the Type Manager

Overview

Understanding Types

Each artifact in 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.

Accet Type	Editor Viewee			
Application Application Application Artfact: WSD. Artfact: WSD.	General None Status ArcheType UDDI Icon	Component Active Asset: Type I Asset: Type UDDI Business Entity Ausign Preview Display Preview		××
	Diverview Taxonomy Technical Operational Documental	Dréamation Ion	Add No Edit Nov Remove	ve Up a Down

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**.

Editor Viewer)					
General						
Name	Component	t.				
Status	Active					¥
ArcheType	Asset Type					v
1000	None			ec Service	Entitu	
Icon	A	Assist	Preview Display	Denio		
	~	Assign		Previe	~	
Tabs						
Overview				~	Add	Move Up
Taxonomy						
Operational	Information				Edit	Move Down
Documentat	ion				Remove	
Tests				~		
Elements						
					Add	Move Up
				1	Edit	Move Down
				2		(
					Remove	Move to Tab
	1					

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).

Uploaded Submission Files File Information Total development hours (TDH) Production investment (Pinv) Consumption Eactor (Cfac)		Edk	Display In Group
iroups Column One	Column Two	Add	Move Up
Overview Taxonomy Technical Operational Information Documentation Tests	Support Metrics Usage Reviews Affinity Change Management Management Review	Edit Remove	Move Down
lements			
		Edit	Move Up
		Hide	Move Down
		Move To Group	

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.

Create N	еw Туре	×
?	Type Name	NewType
	Type for Defaults	Component
	OK	Cancel

- 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.

File View Support Help	
🖃 🖏 Asset Type	Editor Viewer
— 🙏 Application	
— 🙏 Business Process	General
🙏 Communication A	Name
🙏 Component	Component
— 🙏 Environment	Status A. II
— 🙏 Framework	Active
— 🙏 Pattern	ArcheType Asset Time
— 🙏 Process	Asset Type
— 🙏 Service	Icon A
— 🧸 Training	Assign
— 🔍 XML Schema	
🖃 🖏 Compliance Template	

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

Overview	🔺 🛛 Add 🔹 Move Up
Taxonomy	
Technical	Edit Move Down
Operational Information	
Documentation	Remove
Tests	
Support	×

The Tab Information window opens.

Tab Information	X
Tab Name Nev	vTab
	Cancel

- 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.

resis	1
Support	
Metrics	
Change Management	
Management Review	
Miscellaneous	
NewTab	~

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

The preview window opens. The new tab is displayed.

Tests	Support	Metrics	Change Management	Management Review	Miscellaneous	NewTab
Overv	ien	Taxonomy	Technical	Operational Information	Docume	Intation

- 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.

File View Support Help	
□-Ŵ Asset Type -Â Application -Â Business Process	Editor Viewer
A Communication A A Component A Environment A Framework	Name Component Status Active
— 🙏 Pattern — 🙏 Process	ArcheType Asset Type
— 🧸 Service — 🙏 Training — 🔔 XML Schema	lcon 🔔 Assign
E-🖏 Compliance Template	

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

16515		Add	Mound In
Support	- L	200	more op
Metrics			
Change Management		Edit	Move Down
Management Review			
4iscellaneous		Remove	
NewTab	~		

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.

NewTab Overview Taxonomy Technical Operational Information Documentation Techs	Add Move Lip Edit Move Down Remove
--	--

4. Click Preview in the General section.

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

review for	Component Edi	tor			
Tests	Support	Metrics	Change Management	Management Review	Miscellaneous
NewTab	Overview	Taxonomy	Technical	Operational Information	Documentation

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

Editing Workflow Tabs

1. Select the Type to be modified.

File View Support Help	
□-Ŵ Asset Type -Â Application -Â Business Process	Editor Viewer
A Communication Ac A Component A Environment	Name Component
— 🧟 Framework — 🔔 Pattern — 🔔 Process	ArcheType Asset Type
— 🧸 Service — 🙏 Training — 🙏 XML Schema	lcon 🔏 Assign
E-S Compliance Template	

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

Tabs			
Support	<u> </u>	Add	Move Up
Metrics		-	
Change Management	_ [Edit	Move Down
Management Review		-	
Miscellaneous		Remove	
NewTab	~		

- 3. Click Edit.
- 4. Rename the tab.

Tab Information	×
Tab Name NewTabName	
OK Cancel	

- 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.

File View Support Help	
□ Asset Type Application A Business Process	Editor Viewer
- 🔏 Communication Ac	Name Component
— 🧸 Environment — 🙏 Framework — 🙏 Pattern	Status Active
— 🧸 Process — 🙏 Service	Icon 🙏 Assign
→ Compliance Template	

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

16505	A Add Movelle	_
Support	Add Hote op	-
Metrics		
Change Management	Edit Piove Dow	2
Management Review		
Miscellaneous	Remove	
NewTab	~	

3. Click Remove.

A confirmation window appears.

This will delete the selected tabs and their elements.	Any related data will be lost		
This will delete the selected tabs and their elements.	Any related data will be lost. Continue?		
Yes No			

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

- \circ 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.
 - o Required
 - If checked, the field must be populated with data before the asset is saved.
 - o Indexed
 - If checked, the field appears in More Search Options for that type.
 - o 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
 - o 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.
 - o 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
 - o URL
 - \circ Check box
 - o Drop-down box
 - o 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.
 - 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
 - o 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
 - o 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
 - o 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.
 - o 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
 - o 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
 - o 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
 - o 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
 - o 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
 - o 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
 - o 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.
| Elements | | | |
|---------------------------|---|--------|-------------|
| Name | - | Add | Move Up |
| Version | | | |
| Description | | Edit | Move Down |
| Producing Project(s) | | | |
| Predicted Net Hours Saved | | Remove | Move to Tab |
| Platform | | | |
| Client Platforms | - | | |
| 1 | | | |

The Select an Element Type to Add window appears.

Select an Elen	nent Type to Add 🛛 🔀
Element Type	Text Field
Lionioni ()po	Text Field
	Numeric Text Field
	URL
	Check Box
	Drop-down Box 🗕
	Editable List
	Multiple Selection List
	Table 🗾

- 3. Select Numeric Text Field from the drop down.
- 4. Click OK.

The Edit Numeric Text Field window opens.

Edit Numeric Text Field
Display Name
Required 🗖
Indexed 🗖
Minimum Value
Maximum Value 99,999,999
Decimal Places 0
OK Cancel

- 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.

General	
Name	Component
Status	Active
ArcheType	Asset Type
lcon	Assign Preview Display Preview

The Select Icon window appears.

Select Icon			×
	A	Ţ	
	ок 🖧	ancel	
		-	
	Å		
	<u>&</u> :		
	Â	-	

- 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.

File View Support Help				
Asset Type Asset Type Asset Type Application Asset Type Application Asset Type Application Asset Type Asset Type Application Application	Editor Viewer General Name Component Status Active ArcheType Asset Type Icon & Assign			

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.

File View Support Help				
□-S Asset Type Application	Editor			
— 🤱 Business Process — 🔔 Communication Ac — 🔔 Component	Name Component			
— 🧸 Environment — 🙏 Framework	Status Active			
— 🧟 Pattern — 🔔 Process	ArcheType Asset Type			
— 🧸 Service — 🙏 Training — 💧 XML Scheme	lcon 🔔 Assign			
Compliance Template				

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

16515	A Add Mouse	in.
Support		ν.
Metrics	C C C C C C C C C C C C C C C C C C C	
Change Management	Edit	WD.
Management Review		
Miscellaneous	Remove	
NewTab	~	

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

Elements		
Name	Add	Move Up
Version		
Description	Edit	Move Down
Producing Project(s)		
Predicted Net Hours Saved	Remove	Move to Tab
Platform		
Client Platforms		

3. Click Add in the Elements section.

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

Select an Elen	nent Type to Add X
Element Type	Unique Element
	Editable List 📃
	Multiple Selection List
	Table
-	Associated Files
	Unique Element
	Requirement List/Coupling
	Vendor Selection
	Categorization: Asset Lifecycle Stages 🥃

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

The Edit Unique Element pop-up appears.

Edit Unique Element		
Display Name	Unique ID	Children of
	OK Cancel	

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

The Unique ID element now appears in the Elements list.

Elements		
Language	Add	Move Up
Requirements		
Constraints	Edit	Move Down
Packaging Description		
Uploaded Submission Files	Remove	Move to Tab
File Information		
Unique ID		
	_	

8. Save the changes.



Information necessary for custom reporting

Table name:

• UniqueElementValues

Fields:

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

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

Properties

Two properties are associated with the unique element:

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

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

Sample Scenarios:

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

Changing the Version Field Name

Modify the Search Results Pane

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

The file contains the following line: <field display-name="Version" methodname="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 XMLformatted 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
 - o 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:
 - o 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.

File
xml version="1.0" encoding="UTF-8"?
<pre>Cxs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema" elementFormDe</pre>
<xs:element name="cmee"> <xs:complextype> <xs:sequence></xs:sequence></xs:complextype></xs:element>
<xs:complextype></xs:complextype>
<xs:sequence></xs:sequence>
<xs:element name="asset-type"></xs:element>
<xs:complextype></xs:complextype>
<xs:simplecontent></xs:simplecontent>
<xs:extension base="xs:string"></xs:extension>
<xs:attribute name="id" type="xs:long" use="required"></xs:attribute>
<xs:attribute name="icon" type="xs:string" use="required"></xs:attribute>
<xs:element name="mandatory-data"></xs:element>
<xs:complextype></xs:complextype>
<xs:all></xs:all>
<xs:element name="name"></xs:element>
<pre><xs:simpletype><xs:restriction base="xs:string"> <xs:min< pre=""></xs:min<></xs:restriction></xs:simpletype></pre>
<xs:element name="description" type="xs:string"></xs:element>
<pre><xs:element min0<="" name="notification-email" pre="" type="xs:string"></xs:element></pre>
<xs:element minoccurs="0" name="vendor"></xs:element>
<xs:complextype></xs:complextype>
<xs:simplecontent></xs:simplecontent>
/vo-avtanoinn hasa-"vo-otrinn"

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.

Load		×
?	Type Select a type 💌 XML Type Editor	-
-V-	Editor	
	OK Cancel Viewer	

- 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.

Create a	New Asset		<u>.</u>	×
?	Name	V	ersion	
	Туре	Select a type	-	
	Initial State	Unsubmitted		
		Unsubmitted		
		Submitted : Pending Review		

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.

Search 🔽
Enter Search String (?)
Type All Types 🔹
Registration Status
Registered Registered
Unregistered All Assets ins •
Search
Advanced Search

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.

Enable New System Setting	
► Enable	

2. Click Enable.

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

Assets in Progress	⊙ True ○ False
cmee.asset.in-progress	Enables the assets in pro

- 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.

Search 💟
Enter Search String (?)
Type All Types 🔹
Registration Status Registered Registered Unregistered All Assets ms •
Search
Advanced Search

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.

Enable New System Setting	
► Enable	

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.