

**Oracle® Fusion Middleware**

User's Guide for Oracle Enterprise Repository

11g Release 1 (11.1.1.5.0)

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Oracle Fusion Middleware User's Guide for Oracle Enterprise Repository, 11g Release 1 (11.1.1.5.0)

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# Preface

*Oracle Fusion Middleware User's Guide for Oracle Enterprise Repository* describes how to use Oracle Enterprise Repository for delivering governance throughout the service-oriented architecture (SOA) lifecycle by acting as the single source of truth for information surrounding SOA assets and their dependencies.

Oracle Enterprise Repository provides a common communication channel for the automated exchange of metadata and service information between service consumers, providers, policy decision points, and additional governance tooling. It provides the visibility, feedback, controls, and analytics to keep your SOA on track to deliver business value. The intense focus on automation helps to overcome barriers to SOA adoption and streamline governance throughout the lifecycle.

## Audience

This document is intended for all users of Oracle Enterprise Repository.

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## Related Documents

For more information, see the following documents in the Oracle Enterprise Repository 11g Release 1 (11.1.1.5.0) documentation set:

- Oracle Enterprise Repository on OTN - The home page for Oracle Enterprise Repository on Oracle Technology Network (OTN) is:  
<http://www.oracle.com/technology/products/soa/repository/index.html>
- Architect Center: SOA Governance: Essential to Your Business - Learn how effective SOA governance is an essential element in any enterprise transformation strategy by reading the Architect Center: SOA Governance: Essential to Your Business documents at:  
<http://www.oracle.com/us/technologies/soa/center-066464.html>
- SOA Blog - Keep on top of the latest SOA blogs at:  
<http://blogs.oracle.com/governance>

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Oracle Enterprise Repository

This chapter describes how to get started with Oracle Enterprise Repository and also its features.

This chapter contains the following sections:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Getting Started"](#)
- [Section 1.3, "User Role Descriptions"](#)
- [Section 1.4, "Assets"](#)
- [Section 1.5, "Projects"](#)
- [Section 1.6, "My Stuff"](#)
- [Section 1.7, "Reports"](#)

## 1.1 Overview

Governance must address the control and management of entire business processes, trace the relationship of services to other assets in the enterprise, and show how the collection of these elements in an SOA has a direct impact on the effectiveness of the business itself. The combination of Oracle Enterprise Repository and Service Registry, Oracle Web Service Manager, and Oracle Management Pack for SOA forms the technology foundation for SOA governance throughout the SOA lifecycle.

The Oracle Enterprise Repository provides the following value to customers:

- Visibility into all SOA assets and their relationships
  - Automatically collects and populates the Oracle Enterprise Repository and Registry with existing services and other assets through introspection and synchronization with developer tools
  - Provides a flexible and extensible model for categorizing SOA assets
  - Provides visibility of assets that currently exist, are planned, or are in development to reduce duplication of effort
  - Automatically discovers, maps, and manages new dependencies to support impact analysis
- End-to-end governance throughout the lifecycle
  - Automates repeatable processes for registration and life cycle management through out-of-the-box workflows based on best practices

- Provides visibility into policies throughout the lifecycle to promote trust in service quality, performance, and security
- Communicates architectural standards and tracks architectural compliance
- Analytics
  - Tracks and reports on reuse throughout the entire service lifecycle, including development reuse, runtime service reuse statistics and data on consumption and compliance through scorecards
  - Collects and communicates vital information on service performance, quality, and compliance with corporate standards
  - Supports critical decisions with feedback on SOA compliance, performance, and ROI

## 1.2 Getting Started

This section describes the following best practice processes:

- [Section 1.2.1, "Logging into Oracle Enterprise Repository"](#)
- [Section 1.2.2, "The Default View"](#)
- [Section 1.2.3, "Logging Out of Oracle Enterprise Repository"](#)

### 1.2.1 Logging into Oracle Enterprise Repository

To log into Oracle Enterprise Repository, perform the following steps:

1. Using a browser, open Oracle Enterprise Repository.
2. On the login screen, enter the appropriate information in the Username and Password boxes.

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**Note:** If your organization requires a user name and password each time you log into Oracle Enterprise Repository, ensure that the Enable Automatic Login box is unchecked.

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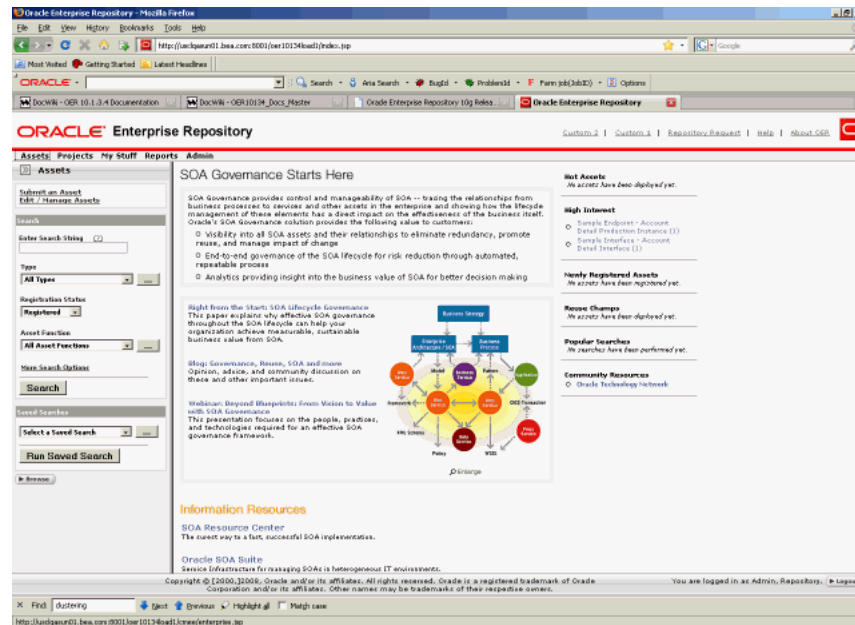
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3. Click **Login**. The Login Status dialog displays a welcome message that includes the date and time of your login.
4. In the Login Stats dialog, click **Close**.

### 1.2.2 The Default View

The Oracle Enterprise Repository home page is displayed upon logging in, as shown in [Figure 1-1](#). This page can be customized by the system administrator to display resources, assets, and news relevant to your company.

Figure 1–1 Oracle Enterprise Repository Home Page



## The Oracle Enterprise Repository Menu Bar

The Oracle Enterprise Repository menu bar runs across the top of the console, and allows you to navigate to the various tools and features within Oracle Enterprise Repository.

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

- **Assets**

Click to use, submit, edit, and manage assets, as determined by the access settings for your assigned role.

- **Projects**

Visible and accessible only to users in the appropriate role.

Click to create, manage, and search for projects, and to assign users to projects.

- **My Stuff**

Click to view information about assets you have produced or consumed, assets that are assigned to you for review and approval, projects to which you are assigned, your saved searches, or assets to which you have subscribed.

- **Reports**

Click to view a number of standard reports based on asset usage, value, and compliance. You can create your own custom reports using the reposting tool of your choice. Custom reports may be added to the Reports page.

- **Admin**

- Visible and accessible only to users in the appropriate role.

- Enables system configuration after installation, and is used to create users, assign roles, configure access settings, configure system and email settings, and monitor system use.

- Custom Link
  - No longer displayed by default.
  - You can configure these additional custom links using the following method:
    - a. Open the Oracle Enterprise Repository home page.
    - b. Click the **Admin** menu, then **System Settings** option.
    - c. Enter **link** in the Search field. The Functional Settings pane is displayed with a list of all the custom links that you can configure.
    - d. Click **True** to enable the display of the custom links.

- **Repository Request**

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

- **Help**

Provides general information about using Oracle Enterprise Repository.

The Oracle Enterprise Repository Home page can be customized to highlight your company's news and policies. This page includes embedded features that display information about new additions to the repository, the most frequently used assets, and a list of users who have achieved the highest levels of asset reuse. As an alternative, your company can substitute its own home page. In addition, you can create different Home pages that can be displayed based on the user's role. In this way, Business Analysts can see a different set of information than Architects or Development resources. Think of this page as a configurable portal that allows your organization to promote initiatives to all Oracle Enterprise Repository users.

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**Note:** These custom home pages would require users to have some exposure to JSP or HTML development as well as the application server's deployment and properties files in order to effectively configure this feature.

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### 1.2.3 Logging Out of Oracle Enterprise Repository

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

To log out:

1. Click **Logout**. A confirmation message appears.
2. Exit the browser, or click **Log back in**.

## 1.3 User Role Descriptions

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

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

- **User**

- 
- Anyone with a Oracle Enterprise Repository user name and password is considered to be a user. This role can be assigned as the default role for any new users at the time the user is created. All Oracle Enterprise Repository users can:
    - \* View news about the company's reuse initiatives
    - \* Locate, evaluate, and use and download assets
    - \* View projects
    - \* Generate reports
    - \* Submit assets to the registrar
  - **Access Administrator**
    - The access administrator creates all Oracle Enterprise Repository users and assigns permissions to them. The access administrator must be familiar with the functions of the Admin page. Typically, access administrators can:
      - \* Create, view, and edit users and permissions
      - \* Generate reports
  - **Advanced Submitter**
    - The advanced submitter role is typically assigned to asset builders and harvesters.
      - \* Asset Builders focus on building the asset content base. They respond to organization-wide asset needs as well as individual project needs.
      - \* Harvesters study deployed projects for asset reuse potential and package and submit these assets to the repository.
    - Typically, advanced submitters can:
      - \* Locate, evaluate, and use and download assets
      - \* View projects that are associated with assets
      - \* Generate reports
      - \* Submit assets to the registrar
      - \* Edit asset metadata prior to asset registration
  - **Registrar**
    - The registrar is the single point of acceptance or rejection for any asset. There may be more than one person functioning as a repository registrar, depending on the functions addressed. Typically, registrars can:
      - \* Locate, evaluate, and use/download assets
      - \* View projects that are associated with assets
      - \* Generate reports
      - \* Submit assets to the registrar
      - \* Edit asset metadata prior to asset registration
      - \* Accept assets for the registration process
      - \* Approve tabs
      - \* Register assets

- \* Apply access settings
- \* Edit artifact stores
- **Registrar Administrator**
  - The registrar administrator is able to use the Type Manager to create and edit asset types, compliance templates, and policy types within the Oracle Enterprise Repository. Typically, registrar administrators can:
    - \* Locate, evaluate, and use/download assets
    - \* View projects that are associated with assets
    - \* Generate reports
    - \* Submit assets to the registrar
    - \* Edit asset metadata prior to asset registration
    - \* Accept assets for the registration process
    - \* Approve tabs
    - \* Register assets
    - \* Apply access settings
    - \* Edit artifact stores
- **Project Administrator**
  - Oracle Enterprise Repository tracks asset use at the project level to maintain a history for impact analysis and reporting purposes. Typically, project administrators can:
    - \* Create, edit, and view projects
    - \* Generate reports
- **System Administrator**
  - The system administrator configures Oracle Enterprise Repository for use, including, possibly, installation as well as the post-installation configurations. The system administrator typically can:
    - \* Enable and edit system settings
    - \* Generate reports

## 1.4 Assets

This section describes how you can work with assets in Oracle Enterprise Repository. This section contains the following topics:

- [Section 1.4.1, "Finding Assets"](#)
- [Section 1.4.2, "Evaluating Assets"](#)
- [Section 1.4.3, "Exporting Asset Details"](#)
- [Section 1.4.4, "Using/Downloading Assets"](#)
- [Section 1.4.5, "Subscribing to Asset Information"](#)
- [Section 1.4.6, "Reviewing Assets"](#)
- [Section 1.4.7, "Performing a Standard Asset Submission"](#)

## 1.4.1 Finding Assets

You can find assets in Oracle Enterprise Repository using various methods. This section contains some of the methods to find assets in Oracle Enterprise Repository:

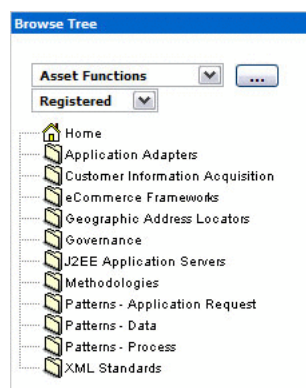
- [Section 1.4.1.1, "Navigating the Asset Tree"](#)
- [Section 1.4.1.2, "Performing Standard Searches"](#)
- [Section 1.4.1.3, "Using the More Search Options Feature"](#)
- [Section 1.4.1.4, "Saving Searches"](#)
- [Section 1.4.1.5, "Printing Search Results"](#)
- [Section 1.4.1.6, "Using EasyLinks"](#)

### 1.4.1.1 Navigating the Asset Tree

This procedure is performed on the Oracle Enterprise Repository Assets page.

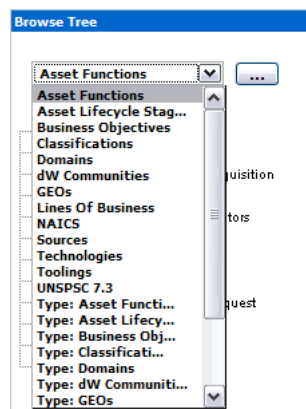
1. Click **Browse** button in the Assets sidebar to open the Browse Tree, as shown in [Figure 1-2](#).

**Figure 1-2 Browse Tree**



2. Use the list to filter the results, as shown in [Figure 1-3](#).

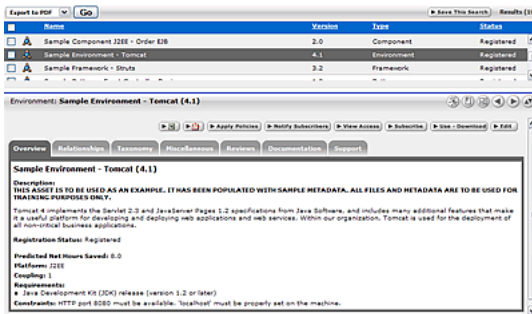
**Figure 1-3 Browse Tree - Filtering**



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

The detail of the first item in the results list automatically opens in the lower frame, as shown [Figure 1-4](#).

**Figure 1-4 Overview Tab**

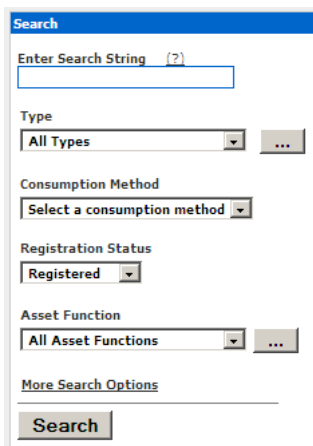


### 1.4.1.2 Performing Standard Searches

This procedure is performed in the Search box in the sidebar of the Assets page.

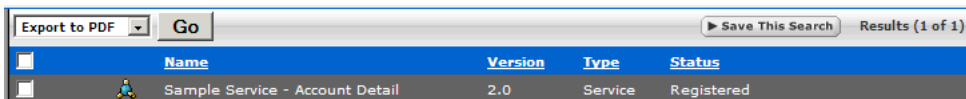
1. Enter a keyword in the Enter Search String text box.

**Figure 1-5 Search Pane**



2. Use the Type and Asset Function lists to refine the search.
3. Click **Search**. The search results are listed in the main pane, as shown in [Figure 1-6](#).

**Figure 1-6 Search Results**



4. If necessary, save the search.

#### 1.4.1.2.1 Searching for a Specific Field

This procedure is also performed in the Search box on the Assets page by entering the appropriate search terms in the text box, as shown in [Figure 1-7](#). You can search for the following specific fields, such as Name, Description, and WSDL. However, you cannot



search for custom data fields. Also, `cmee.search.specific.field` should be enabled to search for specific field.

**Figure 1–7 Search Pane**

- Use the following syntax to perform a search on myAsset in the name field only:  
`name:myAsset`
- Use the following syntax to perform a search on myAsset in the description field only:  
`description:myAsset` or `desc:myAsset`
- The prefix `wsdl:` limits the search to the WSDL binding, port type, or port name.  
Example: `wsdl:myService`

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

---

**Note:** When changes are made to a custom data field, a log is created indicating that a field has changed. However, the specific details of that change are empty.

---

### 1.4.1.3 Using the More Search Options Feature

Using the **More Search Options** feature involves a cascading series of selections and features to create a refined set of search parameters. Selections made at each step in the process determines the specific features and functions displayed in the More Search Options dialog.

#### 1.4.1.3.1 Performing a Search Using the More Search Options Feature

This procedure is performed in the Search box in the sidebar of the Assets page.

1. Click the **More Search Options** link. The More Search Options dialog is displayed, as shown in [Figure 1–8](#).

**Figure 1–8 More Search Options Dialog**

2. Enter an appropriate search string in the Enter Search String text box.
3. Click **Search** to run the search without further refinement. The search results are listed in the upper frame of the main pane of the Assets page, as shown in [Figure 1–9](#).

**Figure 1–9 Search Results**

Name	Version	Type	Status
Sample Service - Account Detail	2.0	Service	Registered

The More Search Options dialog remains open to allow search refinement. The More Search Options dialog contains the Consumption Method list, as shown in [Figure 1–10](#), which gets displayed only if you install the Harvester Solution Pack. For more information about using the Consumption Method list, see "Using Consumption Method" in *Oracle Fusion Middleware Configuration Guide for Oracle Enterprise Repository*.

**Figure 1–10 Assets Pane - Consumption Method**

### 1.4.1.3.2 Filtering More Search Options by Type and/or Registration Status

This procedure is performed in the More Search Options dialog.

---

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

---

1. Select an appropriate type from the Type list.
2. As necessary, select the appropriate registration status from the Registration Status list.
3. Click **Search** to run the search without further filtering. Search results are listed in the upper frame of the main pane of the Assets page.

The More Search Options dialog remains open to allow search refinement.

### 1.4.1.3.3 Filtering More Search Options by Categorizations

This procedure is performed in the More Search Options dialog.

1. Select the appropriate option in the Filter by Categorizations section to locate the search string in Any or All of the selected Categorizations, as shown in [Figure 1–11](#).

**Figure 1–11 Filter by Categorizations**

2. Select the appropriate checkbox to determine the categorizations to be searched.
3. Click the + icon next to any categorization to expand the sub-categorization tree to further refine the search, as shown in [Figure 1–12](#).

**Figure 1–12 Sub-categorization Tree**

4. Click **Search** to run the search without further filtering. The search results are listed in the upper frame of the main pane of the Assets page.

The More Search Options dialog remains open to allow search refinement.

#### 1.4.1.3.4 Filtering More Search Options by Additional Criteria

This procedure is performed in the More Search Options dialog.

1. Select the **Filter by Additional Criteria** option. The Filter by Additional Criteria section is displayed, as shown in [Figure 1–13](#).

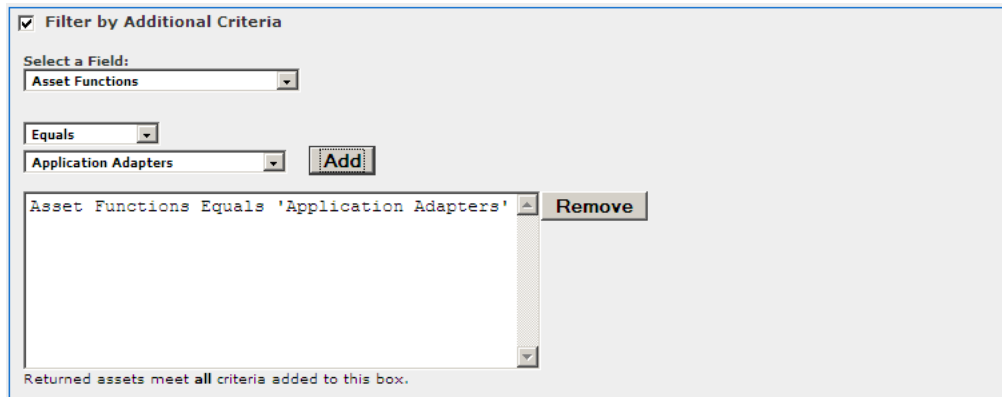
**Figure 1–13 More Search Options Dialog - Filter by Additional Criteria**



Note that the available options in the Select a Field list are determined by the selections made in Filtering More Search Options by Type and/or Registration Status, above.

2. Select one of the options listed in the Select a Field list, as shown in [Figure 1–14](#). This action determines the visibility and contents of subsequent lists in the Filter by Additional Criteria section.

**Figure 1–14 Filter by Additional Criteria - Asset Functions**



3. Select the appropriate additional parameter from the available lists. This selection determines whether an additional list or a text box appears to the left of the Add button.
4. As necessary, enter text in the text box, or select an item from the list.
5. Click **Add**. The search parameter appears in the large text box.
6. Add additional parameters as necessary.
7. To remove a parameter:
  - Select (single-click) the parameter.

- Click **Remove**.
8. When the all search parameters have been added, click **Search**.

Search results appear in the upper frame of the main pane of the Assets page. The More Search Options dialog remains open in the background.

---



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**Note:**

- Search criteria remain intact as long as the More Search Options dialog remains open, even when navigating to other areas in Oracle Enterprise Repository.
  - Click the **More Search Options** link in the sidebar on the Assets page at any time to move the open More Search Options dialog to the foreground, with no change to the criteria established in the current search session.
  - Click **Search** in the More Search Options dialog at any time to refresh the search results and move the search results display to the foreground.
- 
- 

9. If necessary, save the search.

#### 1.4.1.3.5 Searching for Extended Metadata Fields

Certain fields are available for searching on all asset types. These fields are identified by a unique field name, and can be included in criteria for searching for assets of any type. This procedure is performed in the More Search Options dialog.

1. Select the **Filter by Additional Criteria** option.
2. Select an extended metadata field name, such as `import.information` or `internal.import.summary` from the Select a Field list, as shown in [Figure 1-15](#).

The optional Enter an XPath field is displayed.

**Figure 1-15 Filter by Additional Criteria**

3. An Auto Complete feature assists in the entry of XPath's that correspond to the selected extended metadata field.

For example, an XPath of `/properties/source` searches for assets that were submitted to the Repository from Workspace Studio. And an XPath of `/properties/sync-date` searches for the date that submission from Workspace Studio occurred.

4. When the all search parameters have been added, click **Search**.
5. If necessary, save the search.

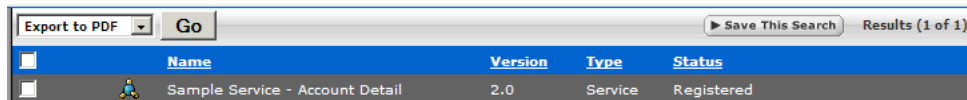
#### 1.4.1.4 Saving Searches


This procedure is performed on the Assets page.

The Saved Searches feature must be activated before searches can be saved. For more information, see *Oracle Fusion Middleware Configuration Guide for Oracle Enterprise Repository*.

1. Perform a standard or More Search Options search. The search results appear in the upper frame of the main pane, as shown in [Figure 1–16](#).

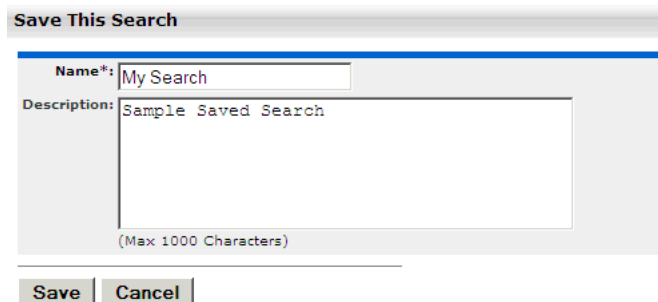
**Figure 1–16 Search Results**



	Name	Version	Type	Status
<input type="checkbox"/>	 Sample Service - Account Detail	2.0	Service	Registered

2. Click **Save This Search**. The Save This Search dialog is displayed, as shown in [Figure 1–17](#).

**Figure 1–17 Save This Search Dialog**



**Save This Search**

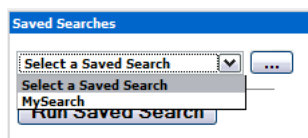
Name\*:

Description:

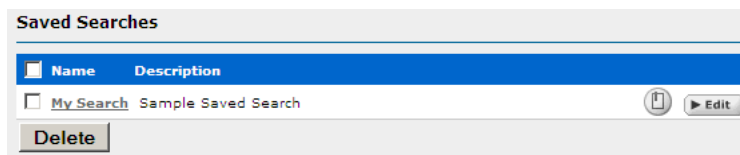
(Max 1000 Characters)

3. Enter the appropriate information in the Name and Description text boxes.
4. Click **Submit**. The saved search is displayed in the Saved Searches list, as shown in [Figure 1–18](#).

**Figure 1–18 Saved Searches Dialog**



The saved searches are also listed in the Saved Searches section in the My Stuff page, as shown in [Figure 1–19](#).

**Figure 1–19 Saved Searches Pane in My Stuff Page**

#### 1.4.1.4.1 Executing a Saved Search

From the Assets page:

1. Select the search to be executed from the Saved Searches list.
2. Click **Run Saved Search**. The search results are listed in the upper frame of the main pane.

#### 1.4.1.4.2 Managing Saved Searches

These procedures are performed in the Saved Searches section in the My Stuff page.

##### Executing a Saved Search

1. Click the text link for the search to be executed. The search results appear in the upper frame of the main pane on the Assets page.

##### Editing a Saved Search

1. Click **Edit** next to the saved search. The Save this Search dialog is displayed.
2. Make changes as appropriate to the text in the Name and Description fields. (Search parameters cannot be edited.)
3. Click **Save**.

##### Deleting a Saved Search

1. Select the search option that you want to delete. (Select the Name check box to select ALL saved searches.)
2. Click **Delete**. The selected search is deleted.

##### Linking to a Saved Search

1. Right-click the text link and copy the URL. The browser's dialog is displayed.
2. Use the copied link information to create a direct link to the saved search. The correct syntax is: `http://servername/appname/index.jsp?savedsearchid=SEARCHID`, where SEARCHID is the ID number of the saved search.

##### Factors Affecting Search Results

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

#### 1.4.1.5 Printing Search Results

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

1. Perform a search. The search results list appears in the upper frame of the Assets page.
2. Click anywhere in the list to select the browser frame.

Option 1:

- a. Select **Print** on the Internet Explorer File menu.
- b. Click the **Options** tab in the Print dialog.
- c. Select the **Only the selected frame** option.
- d. Click **Print**. The document is sent to the printer.

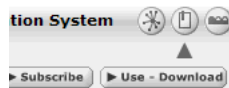
Option 2:

- a. Select **Print Preview** in the Internet Explorer File menu.
- b. Select the **Only the selected frame** option.
- c. Click **Print**. The document is sent to the printer.

#### 1.4.1.6 Using EasyLinks

The **EasyLink** icon is displayed on assets and saved searches, as shown in [Figure 1–20](#). These icons are standard HTML image links that can be copied to the clipboard and pasted into documents or e-mail messages as pointers to specific registry artifacts. EasyLinks can also be dragged and dropped onto the desktop.

**Figure 1–20 EasyLink Icon**



- Click the middle icon to display the asset detail.
- Drag the last icon onto your desktop or into an e-mail or other document to set a link to an asset.

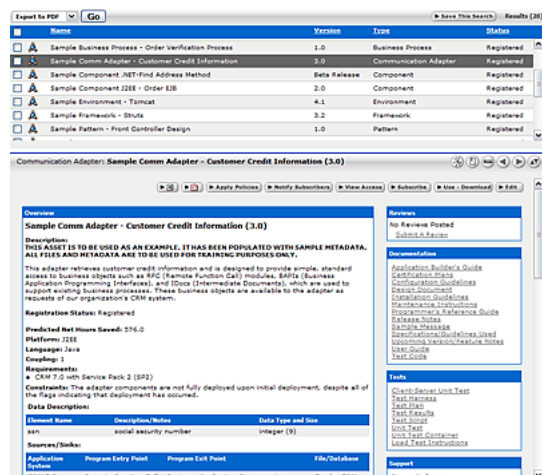
## 1.4.2 Evaluating Assets

The Asset Detail may be viewed in tabular or frame format. The Asset Detail page provides a wide variety of information on the use, functionality, and history of an asset, as shown in [Figure 1–21](#). Typically, asset metadata is provided by the asset producer and is reviewed by the registrars before presentation through Oracle Enterprise Repository. The information that is captured and displayed may be customized by your organization through the Asset Editor and Type Manager.

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



Figure 1–21 Asset Detail Page

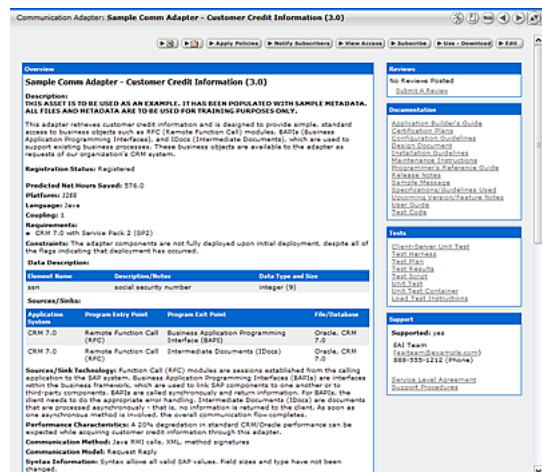


Search results on the Asset Search in the Web console are now limited by default, to improve initial search performance. The number of results is configurable on the Admin | System Properties screen: "cmee.search.assets.maxresults". If a search exceeds the maximum number of results, the search results screen shows a result count like "Results (1000 of 2345)", and a link "Show All" that brings back all of the results.

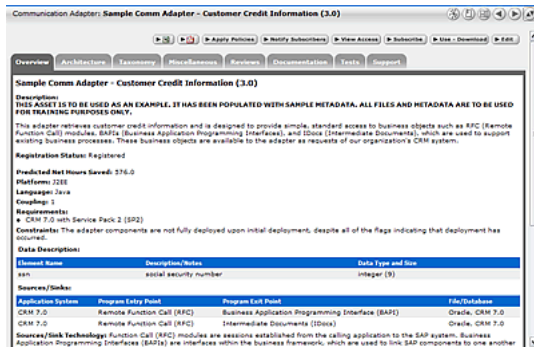
There are navigation icons in the title area of the asset detail. These icons offer a variety of viewing and navigation options to aid in the evaluation of assets.

- Click the **Hide/Display Search Results** icon to expand the Asset Detail, as shown in Figure 1–22. (Click again to restore the search results list in the upper frame.)

Figure 1–22 Asset Detail Page



- Click the **View Details of This Item in Tabs** icon to toggle the Tabbed View mode, as shown in Figure 1–23.

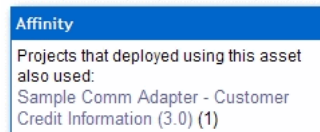
**Figure 1–23 Asset Detail Page**

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

- Click the **View Next/Previous Item in Search Results** icon to navigate to the next or previous asset in the search results.

### Asset Affinity

Within the context of Oracle Enterprise Repository, Affinity is the condition that occurs when two or more assets are deployed in the same project. The Affinity element appears in the asset detail for each asset that meets this condition, and lists other assets that have (deployed) projects in common.

**Figure 1–24 Affinity**

Affinity provides valuable contextual information on asset use.

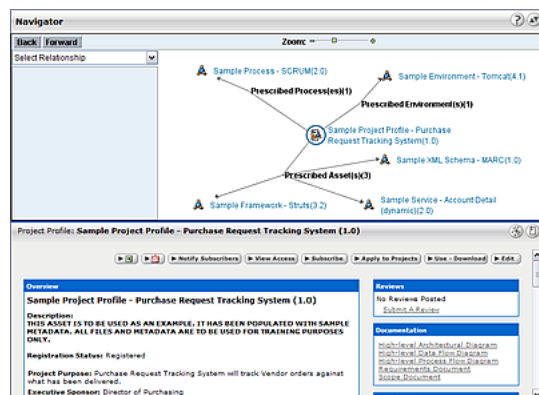
#### 1.4.2.1 Using the Navigator

The Navigator provides a dynamic graphical representation of the inter-relationships among assets and projects.

#### Prerequisite

For information about activating the Oracle Enterprise Repository Navigator, see "Projects and Navigator" section in *Oracle Fusion Middleware Configuration Guide for Oracle Enterprise Repository*.

Click the **Launch the Navigator** icon in the detail display of any asset or project. The Navigator page is displayed, as shown in [Figure 1–25](#).

**Figure 1–25 Navigator Page**

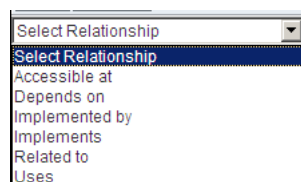
### The Navigator View

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

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

### Relationship View

The Select Relationship menu displays a list of relationships relevant to the in-focus asset, as shown in [Figure 1–26](#).

**Figure 1–26 Select Relationship Menu**

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

### Node Display Options

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

- Enable All Motion
  - Allows items in the display to be dragged around the window to aid viewing.
- View Detail
  - Displays the item's detail in the bottom pane.
  - Action can also be toggled by double-clicking the node icon.

If you right-click the any node other the node in the centre, the following options are visible to you:

- Center
  - Shifts the focus to the selected item, and displays any available related assets or projects. (Does not change the detail display in the bottom pane.) Action can also be toggled by single-clicking the node icon.
- View Detail
  - Displays the item's detail in the bottom pane.
  - Action can also be toggled by double-clicking the node icon.

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

### 1.4.3 Exporting Asset Details

The Asset Detail frame on the Assets page provides a wide variety of information on the use, functionality, and history of an asset. The asset details on an asset can be exported in any one of the following forms:

- [Section 1.4.3.1, "Exporting Asset Detail to Excel"](#)
- [Section 1.4.3.2, "Exporting Asset Detail to PDF"](#)
- [Section 1.4.3.3, "Exporting Asset Search Results to ZIP"](#)

#### 1.4.3.1 Exporting Asset Detail to Excel

You can export asset details to an excel file using the following methods:

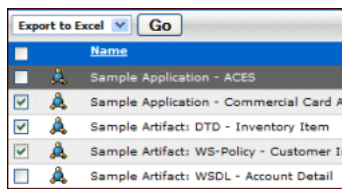
- [Section 1.4.3.1.1, "Export an Excel File from Search Results"](#)
- [Section 1.4.3.1.2, "Export an Excel file from the Asset Detail"](#)

##### 1.4.3.1.1 Export an Excel File from Search Results

This procedure is performed on the Assets page.

1. Perform an asset search by entering keywords in the Enter Search String text box in the Search section. Use the Type and Asset Function list as necessary to refine the search.
2. Select one or more assets from the search results by placing a check in the check box that appears to the left of assets listed in the Search Results pane, as shown in [Figure 1–27](#).

**Figure 1–27 Search Results**



3. Select **Export to Excel** in the list at the top of the pane.

**Note:** The Export to Excel option is displayed, only when the `cmee.asset.registry.export.excel` property is enabled. This is enabled by default, but if you are migrating, then you might face an issue if this property is not enabled.

4. Click **Go**. Export progress is indicated in the progress window, with the following options:
  - Click **Terminate Job** to end the export.
  - Click **View Audit Log** to open a log of the export process.
5. When the export is complete, click **View Excel Spreadsheet** in the progress window. The spreadsheet opens in Microsoft Excel, as shown in [Figure 1–28](#).

**Figure 1–28 Spreadsheet in Microsoft Excel**

Type Name: Component	Number of Assets: 2	Time of Export: Mon Jan 09 16:46:01 EST 2006
	Sample Component .NET-Find Address Method (Beta Release)	Sample Component J2EE - Order EJB (2.0)
<b>Overview</b>		
Name	Sample Component .NET-Find Address Method (Beta Release)	Sample Component J2EE - Order EJB (2.0)
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. Using the Microsoft MapPoint web service, this component finds geographic locations in a specified data source based on an address. An array of possible results ordered by score, the top score, the number of results found, and the index into the array of results, is returned as a FindResults object. Maximum returned values is 250. Default number of returned results is 25	THIS ASSET IS TO BE USED AS AN EXAMPLE. IT HAS BEEN POPULATED WITH SAMPLE METADATA. ALL FILES AND METADATA ARE TO BE USED FOR TRAINING PURPOSES ONLY. Order EJB provides the ability to view the details of a customer order. This Sample Application is for the Java 2 Platform, Enterprise Edition Order EJB Component.
Predicted Net Hours Saved	542	855
Platforms	NET	J2EE
Client Platforms	IE	Windows
Language	NET	Java
Constraints	The FindAddress method is valid with only the MapPoint EU and MapPoint NA data sources. For a table of the available data sources and the functions that can be performed on the data source, see MapPoint .NET Data Sources and Capabilities	Customer orders must have been approved before viewed with this component. The order validation process requires manual intervention and tag time can be up to one hour.
Packaging Description	Modifiable source files have been compiled and are available in a single .zip file.	Class library is packaged as a .zip file
<b>Taxonomy</b>		
Asset Type	Component	Component
Classification	Educational	Recommended
Asset Function	Customer Information Acquisition	Application Adapters
Domains	Geographic Address Location	Customer Information Acquisition
	Customer Service	Customer Service
	Marketing	Finance/Accounting
	Sales & Distribution	Sales & Distribution
Line Of Business	{Product Line 1}	{Product Line 1}
	{Service Offering 2}	{Product Line 2}
		{Service Offering 1}
		{Service Offering 2}
Technology	NET	J2EE
Keywords	gps	commerce
	street address	inventory

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

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

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

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**Note:** To use Export Policies To Excel from Asset Search Results Page, perform the following steps:

1. Log in to <https://support.oracle.com>.
2. Click the **Knowledge** tab. The Knowledge Home page is displayed.
3. In the top-right corner of the screen, select Article ID from the Sources list.
4. Enter 952047.1 in the space for entering the article ID number, and click the **Browse** icon.

The Knowledge Browser window is displayed with this article - Unable to Export Policies To Excel from Asset Search Results Page [ID 952047.1].

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#### 1.4.3.1.2 Export an Excel file from the Asset Detail

This procedure is performed on the Assets page.

1. Locate the appropriate asset.
2. Click the **Excel** icon in the asset detail. Export progress is indicated in the progress window.
3. When the export is complete, click **View Excel Spreadsheet** in the progress window to open the spreadsheet in Microsoft Excel.

---

---

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

---

---

#### 1.4.3.2 Exporting Asset Detail to PDF

This procedure is performed on the Assets page.

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**Note:**

- Only assets of Types to which an XSLT printing template is associated are available for export to PDF.
  - In the event that the asset selected for export is of a Type to which no printing template is associated, you are notified through a dialog that the export cannot proceed. If multiple assets are selected for export, the dialog lists the Types that cannot be exported. You can then: (a) proceed with the export of any assets of Types with associated printing template, or (b) cancel the export.
  - Please notify the Registrar of assets that cannot be exported to PDF.
- 
- 

#### 1.4.3.2.1 Exporting from the Asset Detail Pane

You can export the asset details to PDF from the Asset Detail pane.

1. Use Search or other means to locate the appropriate asset.
2. Click the **PDF** icon in the asset detail.

3. If prompted to do so, select a printing template from the list.

If the Adobe Acrobat plug-in is installed, the browser opens the PDF. Otherwise, you are prompted to save or open the file.

#### 1.4.3.2 Exporting from the Search Results List

1. Perform an asset search by entering keywords in the Enter Search String text box in the Search section.

Use the Type and Asset Function list as necessary to refine the search.

2. Select one or more assets from the search results by placing a check in the check box that appears to the left of assets listed in the Search Results pane.
3. Select **Export to PDF** from the list above the list of assets.
4. Click **Go**.
5. If the Adobe Acrobat plug-in is installed, the browser opens the PDF. Otherwise, you are prompted to save or open the file.

#### 1.4.3.3 Exporting Asset Search Results to ZIP

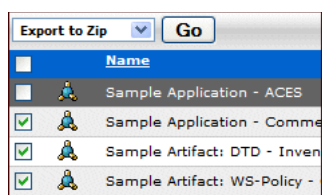
When enabled, the Export to ZIP feature allows the export of asset information to a ZIP file, through a menu selection on the asset search results screen.

- The Export to ZIP feature is available only to users with Administrator permissions.
- Import/Export must be enabled. For more information, see [Chapter 4, "Import Export Tool"](#).
- The exported file contains all asset metadata in XML format, including relationships.

This procedure is performed in the Search Results frame on the Assets page.

1. Use Search or other means to locate the asset(s) to be exported to a ZIP file.
2. Use the check boxes in the search results list to select the assets to be exported to ZIP, as shown in [Figure 1–29](#).

**Figure 1–29 Search Results**



3. Select **Export to ZIP** from the list.
4. Click **Go**. The Export to ZIP progress dialog is displayed.
5. When the export is complete, click **Download** to download the exported zip file. The File Download dialog is displayed.
6. Select Open, Save, or Cancel, as appropriate.

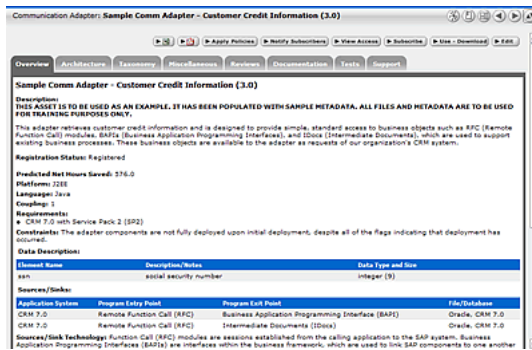
## 1.4.4 Using/Downloading Assets

Using/Downloading an asset allows users to obtain the payload files associated with an asset. For Service assets, the WSDL file might be included as the asset payload. Using/Downloading an asset also initiates asset usage tracking. You have to select the project on which you are using the asset, and the usage is attributed to that project. Email notifications can be initiated after a configurable period of time that ask the user to indicate whether they are still evaluating the asset, have tentatively accepted it for use, or have rejected it.

Perform the following steps to download an asset and its associated files for evaluation.

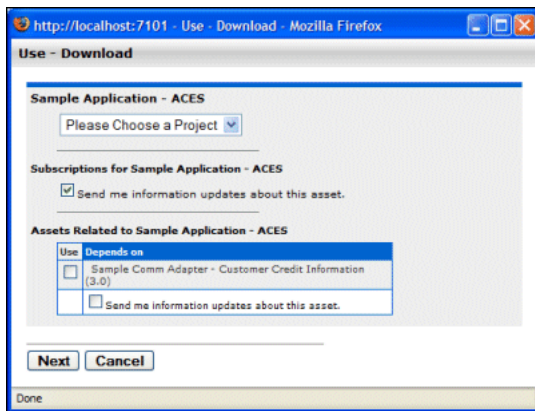
1. Use Search or other means to locate the asset to be used.
2. Click **Use / Download** in the asset detail, as shown in [Figure 1–30](#).

**Figure 1–30 Asset Details Page**



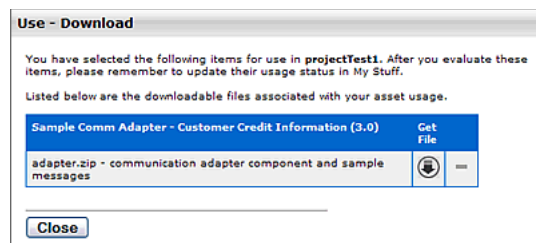
The Use - Download page is displayed, as shown in [Figure 1–31](#).

**Figure 1–31 Use - Download Page**



3. Use the Please Choose a Project list to assign the asset to a project (mandatory).
4. Make the appropriate selection in the Subscription check box.
5. As necessary, select any available related assets for inclusion in the download and/or subscription.
6. Click **Next**. A new dialog is displayed to display the downloadable files in the asset payload.



**Figure 1–32 Use - Download Page**

7. Click the **Get File** icon. The File Download dialog is displayed.
8. Proceed with the download as necessary.
9. Repeat Steps 7 and 8 as necessary to download other files in the asset payload.
10. When finished, click **Close** to close the Use - Download dialog.
11. After evaluating the asset, be sure to update the asset's status on the My Stuff page.

### 1.4.5 Subscribing to Asset Information

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

1. Use Search or other means to locate an asset.
2. In the Asset window, double-click the asset to display the details of the asset.
3. In the asset details section that appears below the list of assets, click the **Subscribe** option that appears in the extreme right corner. The Subscribe dialog is displayed.
4. Click the **Subscribe** button. The asset subscription dialog with the following message is displayed:
 

*Send me information updates about this asset.*
5. This option is selected by default, click **Close**. The asset is added to the list of asset subscriptions on the My Stuff page.

### 1.4.6 Reviewing Assets

Individuals who have used an asset may provide a written review and a rating for the asset. These reviews are useful to other users, as well as to those who manage the assets. It provides an opportunity for users to share their experiences with others in the community.

Follow these steps to rate an asset and to submit a review.

1. Use Search or other means to locate the asset to be reviewed.
2. Click **Submit a Review** in the Reviews section of the asset detail. The Submit a Review dialog is displayed, as shown in [Figure 1–33](#).

**Figure 1–33 Submit a Review**

3. Select the appropriate rating from the Rating list.
4. Enter the appropriate review information in the Comments text box.
5. Click **Submit**. A confirmation message appears.
6. Close the window, or click [click here](#) to display the review. The review is now listed on the Reviews tab in the asset detail.

### 1.4.7 Performing a Standard Asset Submission

This procedure is performed on the Assets page.

1. Click **Submit an Asset** in the sidebar. The Asset Submission page is displayed, as shown in [Figure 1–34](#).

**Figure 1–34 Asset Submission Page**

2. Select the appropriate Type template to apply to the asset from the list in the Overview section, as shown in [Figure 1–35](#).

**Figure 1–35 Overview Section**

3. Enter the appropriate information in the Name, Version, and Description text boxes in the Overview section. (Required)
4. Enter the appropriate information in the Comments section. (Optional)
5. As necessary, designate the project that produced the asset by using the >> and << icons to move the appropriate item from the Available Projects to the Selected Projects columns, as shown in [Figure 1–36](#).

**Figure 1–36 Producing Projects Dialog**

6. Enter the URL of the file containing the asset to be submitted in the File's Location URL text box in [Figure 1–37](#).
7. Click **Test** to validate that the file location URL is correct.
8. (Optional.) Alternatively, you can also click **Browse** that appears at the end of the File Upload field to browse for the file to send it to the server. Then, click the **Add Attachment Now** button.

**Figure 1–37 File Information Section**


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**Note:** You can disable this requirement by entering `cmee.submission.file.required.enable` into the Admin System Settings Search box and set the value to `False` and click **Save**.

---

9. When finished, click **Submit**. The Asset Submission confirmation dialog is displayed, confirming that the asset has entered the asset registration queue.
10. Click **Close**.

---

**Note:** For information about advanced asset submission and the use of the Asset Editor and the Type Manager, see *Oracle Fusion Middleware Configuration Guide for Oracle Enterprise Repository*.

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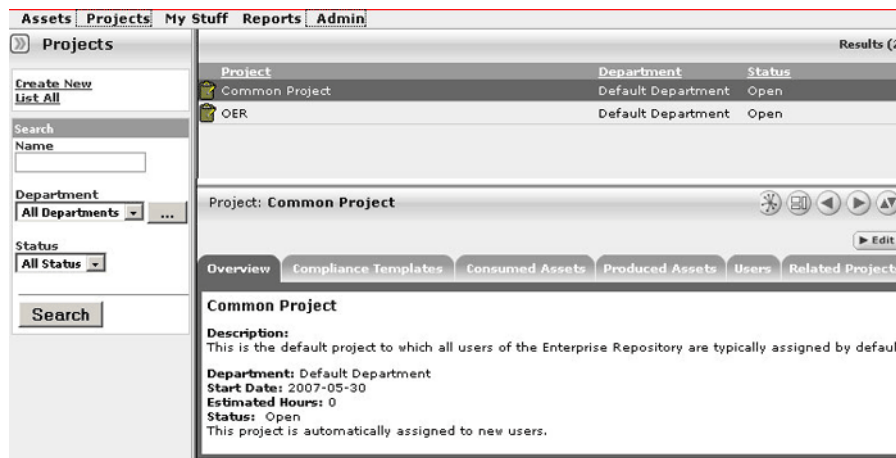
## 1.5 Projects

Projects are the primary means of gathering metrics in Oracle Enterprise Repository. Oracle Enterprise Repository tracks assets produced by projects, as well as assets consumed by projects. Oracle Enterprise Repository users are assigned to projects, and when a user submits a new asset, they are prompted for the producing project. Likewise, when a user wants to reuse an asset, they are prompted for the project on which the asset is reused. This allows Oracle Enterprise Repository to generate reports on the reuse savings per project. It also allows Oracle Enterprise Repository to report on the savings generated by asset production teams. Projects are also hierarchical, which allows organizations to, for example, establish a program that may spawn many projects.

Projects are also a channel for governance practices. Oracle Enterprise Repository Compliance Templates (usually taking the form of Architecture Blueprints or Project Profiles) can be applied to projects.

The Oracle Enterprise Repository Projects page provides access to tools for creating and managing projects, as shown in [Figure 1–38](#).

**Figure 1–38 Oracle Enterprise Repository Projects Page**



- [Section 1.5.1, "Viewing Project Details"](#)
- [Section 1.5.2, "Locating a Project"](#)

### 1.5.1 Viewing Project Details

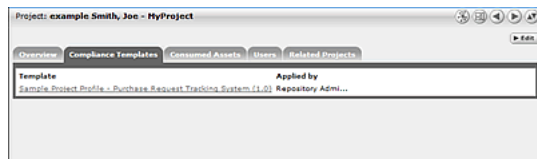
Project information may be displayed as a series of portlets or tabs:

Includes a project Description, and indicates the assigned Department, Start Date, Estimated Hours, and project Status.

#### Compliance Templates

Displays the Compliance Template(s) assigned to the project, as shown in [Figure 1–39](#).

**Figure 1–39 Compliance Templates Tab**



**Consumed Assets**

Lists any assets used in (or under consideration for use in) the project, as shown in Figure 1–40.

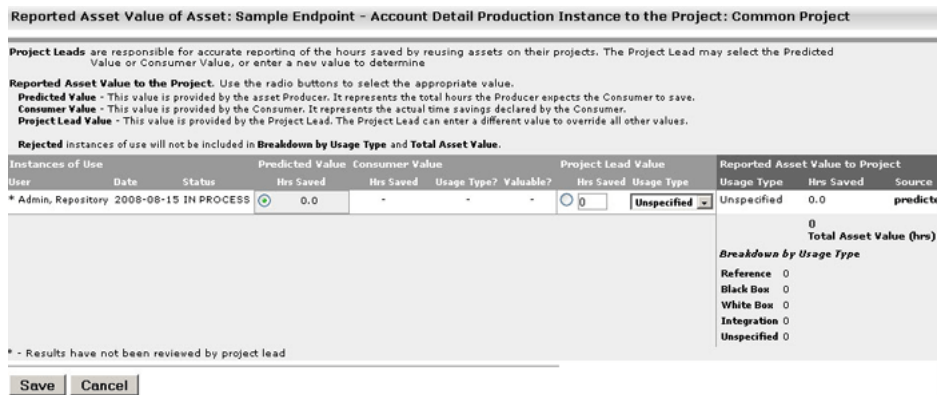
**Figure 1–40 Consumed Assets Tab**



Click the **Zoom** icon next to any listed asset to display its Reported Asset Value.

- Project members can view the Asset Usage Detail.
- Project leaders can view/edit the Reported Asset Value.

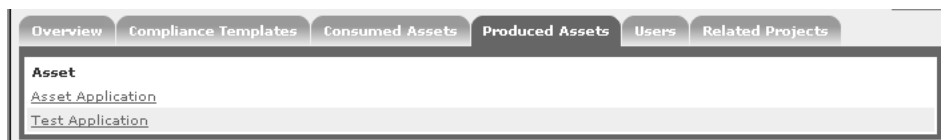
**Figure 1–41 Reported Asset Value of Asset**



- Reported Asset Value represents the hours saved by reusing assets on their projects. This value is derived from either the Predicted Value, Consumer Value, or a completely new value determined by the project leader. Only the project leader can set this value.

**Produced Assets**

Lists any assets produced by the project, as shown in Figure 1–42.

**Figure 1–42 Produced Assets Tab****Users**

Lists all users associated with the project, as well as each user's role on the project (leader/members), as shown in [Figure 1–43](#). Project leaders have the ability to assign a Reported Asset Value value to assets consumed by the project.

**Figure 1–43 Users Tab****Related Projects**

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

**1.5.2 Locating a Project**

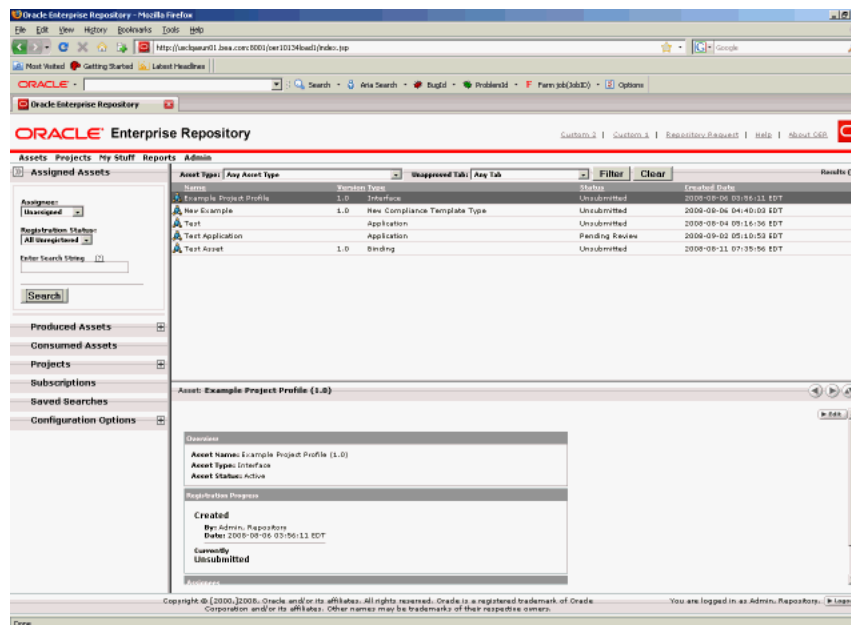
This procedure is performed on the Projects page.

1. Enter a keyword or search term in the Name text box.
2. Use the Department and Status lists as necessary to filter the search.
3. Click **Search**. The search results are listed in the main pane.

**1.6 My Stuff**

The My Stuff page provides each user with a personalized Oracle Enterprise Repository home page.

Figure 1–44 Oracle Enterprise Repository Assets Home Page



The My Stuff page is comprised of several elements, as described below:

- Section 1.6.1, "Assigned Assets"
- Section 1.6.2, "Produced Assets"
- Section 1.6.3, "Consumed Assets"
- Section 1.6.4, "Projects"
- Section 1.6.5, "Subscriptions"
- Section 1.6.6, "Saved Searches"
- Section 1.6.7, "Configuration Options"

## 1.6.1 Assigned Assets

Lists all the assets assigned to a user for review and processing as part of the asset registration process. You can base your search for assets by selecting Assignee depending on the options below:

- Me - Asset that I am assigned to
- Unassigned - Asset that nobody is assigned to
- Any Assignee - Asset that somebody is assigned to

You can also base your search for assets on the registration status of an asset. The registration status that can assigned to any asset are as follows:

- Registered
- Unregistered
- All Assets

After you selected the values in the Assignee and Registration Status fields, enter a search string in the Enter Search String field and click Search. The result of your search is displayed on right-side of the screen.

## 1.6.2 Produced Assets

Lists assets that you submitted.

Click any listed asset to:

- View an asset overview (the asset detail).
- Edit an asset.
- If the asset submission was rejected, then you can also resubmit the asset by selecting the Edit button.

The left pane options available are:

- **Submit an Asset:** Allows you to submit an asset.
- **Edit / Manage Assets:** Allows you to edit or manage an asset that is already existing. When you click the Edit / Manage Assets option, the Asset Editor window opens, this allows you to perform the following actions
  - Configure Acceptable Value Lists
  - Configure Artifact Stores
  - Configure Categorizations
  - Configure Relationships
  - Configure Rejection Reasons
  - Configure Vendors

The Search My Assets pane allows you to list assets according to Registration status. For more information, see *Oracle Fusion Middleware Configuration Guide for Oracle Enterprise Repository*.

## 1.6.3 Consumed Assets

Lists In-Process assets with a survey status of Still Evaluating and the project to which the asset is associated.

Click any listed asset to:

- View an asset overview.
- Submit a review for an asset.
- Update the status of the survey.

## 1.6.4 Projects

Lists Closed and Open projects to which the user is assigned. The options available on the left pane are as follows

- **Create New:** Enables the user to create a new project.
- **List All:** Lists all the projects that are currently available.

Click any listed project to view the following details:

- **Overview:** Describes the general overview of the project that covers Description, the Department it belongs to, other details such as Start Date, Estimated Hours, and Status.
- **Applied Compliance Templates:** Describes the compliance templates currently applied to the project.



- **Consumed Assets:** Describes the assets consumed or downloaded for this project.
- **Produced Assets:** Describes the assets produced for this project.
- **Users:** Describes the users assigned for this project. You can also reassign the users by clicking the Reassign Users / Usage option.
- **Related Projects:** Describes the projects that are currently related to this project.

## 1.6.5 Subscriptions

Lists all the asset subscriptions that the users would be notified of any updates.

### Unsubscribe to an Asset

To unsubscribe to an asset, select the asset that you wish to unsubscribe and then click the Unsubscribe button. A confirmation dialog opens, click OK.

Click any listed asset to view the asset details. The names and descriptions of the various tabs available are as follows:

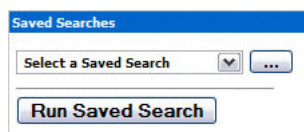
- **Apply Policies:** Enables you to apply or remove policies from this asset.
- **Notify Subscribers:** Enables you to send an email notification to the subscribers of this asset.
- **View Access:** Enables you to view the access settings for an asset.
- **Subscribe:** Enables you to subscribe to this asset to be notified of any updates.
- **Use - Download:** Enables you to use this asset and download any available files.
- **Edit:** Enables you to edit the details of this asset.

## 1.6.6 Saved Searches

Lists all saved searches. This option allows you to search for a particular search and save it for future.

Click any listed search to display the search results, as shown in [Figure 1–45](#).

**Figure 1–45** *Saved Searches Dialog*



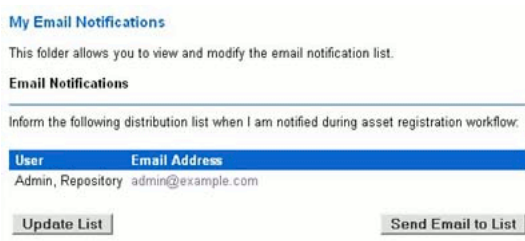
To delete a saved search, you must select the saved search, and then click the **Delete** button.

## 1.6.7 Configuration Options

### Email Notifications

Lists all members of the distribution list.

**Figure 1–46 Email Notifications**



- Click the **Update List** button to add or remove list members.
- Click the **Send Email to List** button to open an email that is addressed to the list members.

**Change Password**

Allows you to change the password to Oracle Enterprise Repository. This has the following fields:

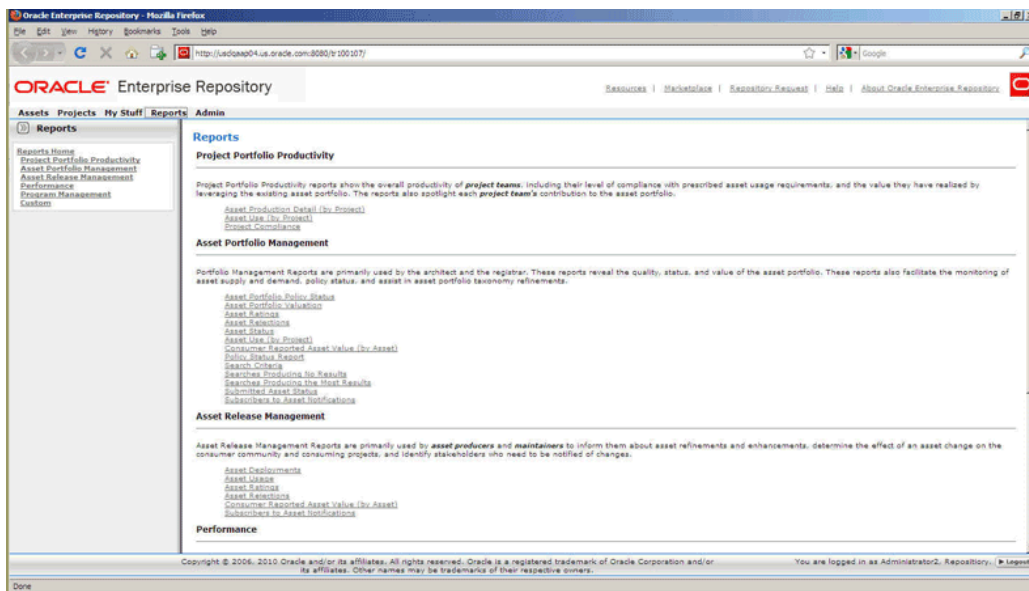
- Old Password
- New Password
- Verify Password

Enter the above credentials and click the **Change Password** button.

**1.7 Reports**

This section discusses the Oracle Enterprise Repository reports that are available in the Reports page, as shown in [Figure 1–47](#).

**Figure 1–47 Oracle Enterprise Repository Reports Page**



**1.7.1 Report Types**

This section breaks down the Oracle Enterprise Repository report types.

## Project Portfolio Productivity Reports

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

- **Asset Production Detail (by Project)** (requires the asset production tracking feature to be enabled)

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

- **Asset Use (by Project)**

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

- **Project Compliance (assumes use of Compliance Templates)**

Shows the Compliance Templates applied to projects and whether the project is in compliance with the template.

## Asset Portfolio Management Reports

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

- **Asset Portfolio Policy Status**

Shows a summary of the policy status (pass, fail, unknown) for an organization's entire asset portfolio. The report then allows users to view a list of assets for each status (for example, all of the assets that are failing). The detailed reports list all policies applied to each asset, and the status of all policy assertions.

- **Asset Portfolio Valuation**

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

- **Asset Ratings**

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

- **Asset Rejections**

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

- **Asset Status**

Shows the asset name, type and status (active, inactive, and so on). Registrars may use this report to determine the level of asset lifecycle maintenance required for the asset portfolio.

- **Asset Use (by Project)**

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

- **Consumer Reported Asset Value (by Asset)**

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

- **Policy Status Report**

Shows a summary of all policies in an organization's policy portfolio, and the number of assets that are passing, failing, or have an unknown status. This report also shows a detailed list of the assets that are governed by each policy, and the number of assertions that are passing, failing, or have an unknown status.

- **Search Criteria**

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

- **Searches Producing No Results**

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

- **Searches Producing the Most Results**

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

- **Submitted Asset Status**

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

- **Subscribers to Asset Notifications**

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

### **Asset Release Management Reports**

Used primarily by asset producers and maintainers, these reports inform these users about asset refinements and enhancements, determine the effect of an asset change to the consumer community and consuming projects. In addition, these reports identify

stakeholders who must be notified about changes. Asset release management reports include:

- **Asset Deployments**

Shows the names of deployed assets and the projects with which they are associated. Used by producers, maintainers, and project leads to assess the effect of change to an asset.

- **Asset Usages**

Lists the assets selected for use in specific projects. Used by producers, maintainers, and project leads to assess the potential impact of changes to an asset.

- **Asset Ratings**

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

- **Asset Rejections**

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

- **Consumer Reported Asset Value (by Asset)**

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

- **Subscribers to Asset Notifications**

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

### **Performance Reports**

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

- **Asset Use (by project)**

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

### **Program Management Reports**

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

- **Active and Unapproved User Login**

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

Shows the names of active and unapproved users who have never logged in. The system administrator or security administrator may use this report to reallocate registry licenses.
- **Asset Portfolio Valuation**

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

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

Shows the password changes made for users. The report may be used by security administrators or system administrators to identify security breaches.
- **Submission Status (by Producer)**

Shows the names of producers, the number of assets submitted and registered, number of use instances, and the estimated time saved by asset consumers.
- **Subscribers to Asset Notifications**

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

## 1.7.2 Adding Custom Reports

Oracle Enterprise Repository allows you to add custom reports to the Reports page. All custom Reports must be generated by a reporting engine external to Oracle Enterprise Repository and must be exposed by a URL. On the Reports page, the custom report can be given a name, description, and a hyperlink to it.

Important! If custom reports are added in this fashion, then the directory containing the reports must be backed up and protected during future upgrades of Oracle Enterprise Repository.

### 1.7.2.1 Overview

The Oracle Enterprise Repository Reports subsystem is built from a collection of .toc (table of contents), .jod (an XML representation of the internal report GUI), and .xml (Oracle Enterprise Repository Report definition) files. These files reside within the `WEBINF/config/reports` directory of the Oracle Enterprise Repository web application. To construct a custom report, a .toc file must be modified and a .xml file

must be created. The `.jod` files have nothing to do with this customization and should not be modified.

Oracle provides a `custom.toc` file for the table of contents beneath the Custom section of the Reports page. A `customreports.xml` file is also included, and which must be copied and named to something for the report.

### 1.7.2.2 Configuration Steps

The steps to configure custom reports in Oracle Enterprise Repository are as follows:

1. Browse to the `WEB-INF/config/reports` directory for your deployed instance of Oracle Enterprise Repository.
2. Copy `customreports.xml` to a new name that represents the report. The extension must be `.xml` (For example, `CustomerReportA.xml`).
3. Edit `customreports.xml` to name it, describe it, and add a hyperlink to the report, as follows:
  - The `<report>` element has a parameter name that must refer to a unique, short name for the report. The filename is recommended (For example, `<report name='CustomerReportA'>`).
  - The value of the `<displayName>` element is the label shown in the Reports page within the Custom section (For example, `<displayName>Report A</displayName>`).
  - The value of the `<description>` element is the description shown in the Reports page (For example, `<description>This describes Report A.</description>`).
  - The value of the `<externalLink>` element is the URL for the report. This URL should execute the report. (For example, `<externalLink>http://www.example.com/reports/CustomerReportA?cmd=execute</externalLink>`).
4. Save the copied and modified `customreports.xml` file into the `WEB-INF/config/reports` directory. This is where Oracle Enterprise Repository looks for all report files. The report is now created.
5. Edit the `custom.toc` file to add the newly created report to the Reports area of Oracle Enterprise Repository.
  - The `<report>` element specifies the name of the report. Use identical text to what appears in the `.xml` file for the report. The filename is recommended. (For example, `<report name='CustomerReportA'>`)
6. Back up the `custom.toc` and `.xml` files for the report. These copies are required after upgrades since the upgrade resets the files.
7. Restart the application server.

### 1.7.3 Running a Report

This procedure is performed on the Reports page. You must install and configure the Oracle Business Intelligence Publisher (BI Publisher) to run a report.

1. Select the report from the list in the sidebar. The report form opens BI Publisher in a new browser window.
2. Login to the BI Publisher using the BI Publisher user name, which is different from the Oracle Enterprise Repository user name.

3. Select parameter values at the top of the report.
4. Click the calendar icon to launch a calendar to select From and To dates. The dates for each report default to a range of Year-To-Date.
5. Select other parameters as appropriate for the report.
6. Select a **Sort Order**.
7. Click the Template list to select an output format for the report. By default, the HTML template is displayed.
8. Click **View**. The report is generated.



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## Using the Asset Editor

This chapter describes how to use the Asset Editor in Oracle Enterprise Repository.

This chapter contains the following sections:

- [Section 2.1, "Overview"](#)
- [Section 2.2, "Launching the Asset Editor"](#)
- [Section 2.3, "Configuring System Options"](#)
- [Section 2.4, "Advanced Asset Submission"](#)
- [Section 2.5, "Asset/Compliance Template/Policy Migration"](#)
- [Section 2.6, "Asset Registration Status"](#)

### 2.1 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.

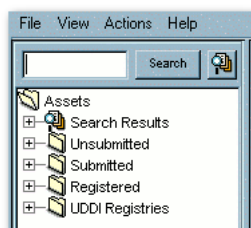
The specifics of configuration depend on your organization's guidelines, and may differ slightly from the options discussed here.

### 2.2 Launching the Asset Editor

This procedure is performed on the Oracle Enterprise Repository Assets screen.

1. Click **Edit/Manage Assets**. The Asset Editor is displayed, as shown in [Figure 2-1](#).

**Figure 2-1** Asset Editor



## 2.3 Configuring System Options

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

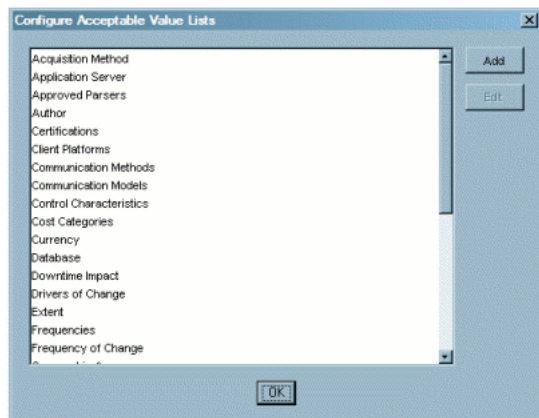
- [Section 2.3.1, "Configure Acceptable Value Lists"](#)
- [Section 2.3.2, "Configure Artifact Stores"](#)
- [Section 2.3.3, "Configure Categorizations"](#)
- [Section 2.3.4, "Configure Relationships"](#)
- [Section 2.3.5, "Configure Rejection Reasons"](#)
- [Section 2.3.6, "Configure Vendors"](#)

### 2.3.1 Configure Acceptable Value Lists

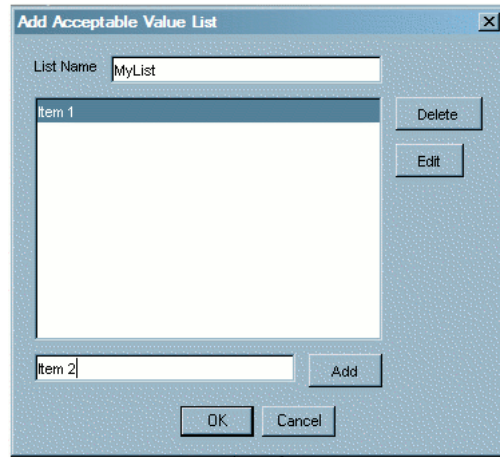
Defines/identifies the single- and multiple-selection lists used as metadata elements in asset displays.

1. Select **Configure Acceptable Value Lists** from the Actions menu. The Configure Acceptable Value Lists dialog is displayed, as shown in [Figure 2–2](#).

**Figure 2–2** *Configure Acceptable Value Lists*



2. Click **Add**. The Add Acceptable Value List dialog is displayed, as shown in [Figure 2–3](#).
3. Enter an appropriate name in the List Name text box.

**Figure 2-3 Add Acceptable Value List Dialog**

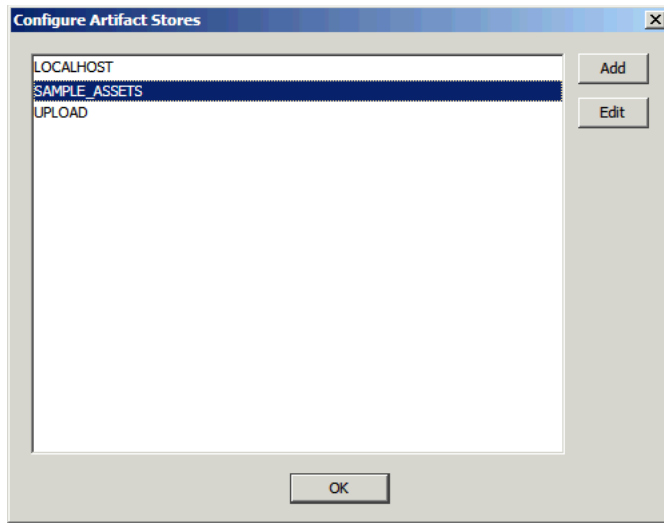
4. Enter an appropriate list item name in the text box next to the Add button.
5. Click **Add**.
6. Repeat Steps 4 and 5 as necessary to add additional list items.
7. When finished, click **OK**. The new list appears in the Configure Acceptable Value Lists window.
8. To edit any Acceptable Value List, select the list from the Configure Acceptable Value Lists window.
9. Click **Edit**. The Edit Acceptable Value List dialog is displayed. (Same form as the Add Acceptable Value List window.)
10. Make changes as necessary.
11. Click **OK**.

### 2.3.2 Configure Artifact Stores

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

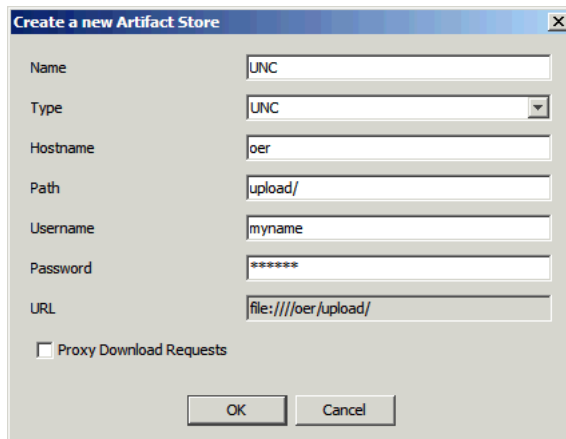
1. Select Configure Artifact Stores from the Actions menu. The Configure Artifact Stores dialog is displayed, as shown in [Figure 2-4](#).

**Figure 2–4 Configure Artifact Stores Dialog**



2. Click **Add**. The Create a New Artifact Store dialog is displayed, as shown in [Figure 2–5](#).

**Figure 2–5 Create a New Artifact Store Dialog**



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

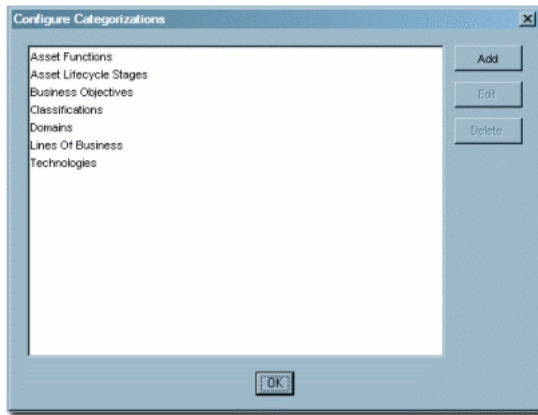
- Raw URI  
Access files through a raw URI.
- Raw SCM  
Access files through a raw SCM. Allows the selection of SCM Types, including CVS, Perforce, and Other. The selected SCM type automatically populates the Download Path URI Suffix field, but the field can be modified however necessary.
- Depending on the integration options included in your installation of Oracle Enterprise Repository, 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 either ViewCVS or similar product configured)
  - 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 dialog is displayed. (Same form as the Create a new Artifact Store window.)
- 10. Make changes as necessary.
- 11. Click **OK**.

### 2.3.3 Configure Categorizations

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

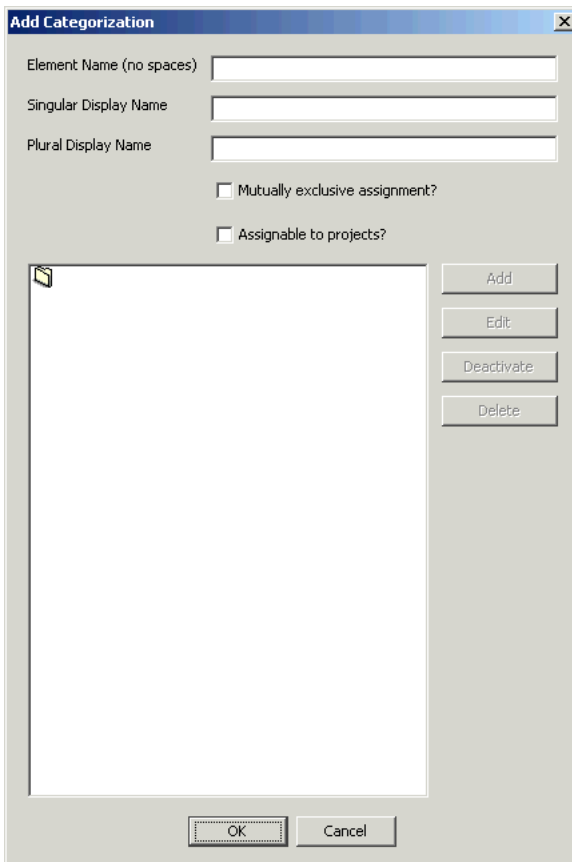
1. Select **Configure Categorizations** from the Actions menu. The Configure Categorizations dialog is displayed, as shown in [Figure 2–6](#).

**Figure 2-6 Configure Categorizations Dialog**



2. Click **Add**. The Add Categorizations dialog is displayed, as shown in [Figure 2-7](#).
3. Enter the appropriate information in each of the text boxes.

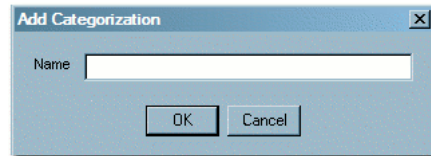
**Figure 2-7 Add Categorizations Dialog**



4. Select the **Mutually exclusive assignment?** option if assets can be assigned to only one of the categorizations in this categorization type.
5. Select the **Assignable to Projects?** option (if this option has been enabled by your Oracle Enterprise Repository Administrator) so categorizations can be assigned to projects, and not to assets.

6. If UDDI is enabled for your environment, then Oracle Enterprise Repository automatically creates tModelKeys for categorizations. If required, an administrator can assign specific UDDI Version 2 or Version 3 tModelKeys to any categorization.
7. Click **Add** to add sub-categorizations. The Add Categorizations dialog is displayed, as shown in [Figure 2-8](#).

**Figure 2-8 Add Categorizations Dialog**



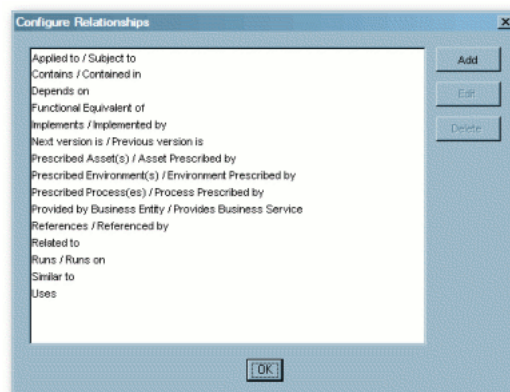
8. When finished, click **OK**. The new categorization appears in the Configure Categorizations window.
9. To edit any Categorization, locate it in the list in the Configure Categorizations window.
10. Click **Edit**. The Edit Categorization dialog is displayed. (Same form as the Add Categorizations window.)
11. Make changes as necessary.
12. Click **OK**.

### 2.3.4 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 dialog is displayed, as shown in [Figure 2-9](#).

**Figure 2-9 Configure Relationships Dialog**



2. Click **Add**. The Add Relationships dialog is displayed, as shown in [Figure 2-10](#).
3. Enter the appropriate information in each of the text boxes.

**Figure 2–10 Add Relationship Dialog**

4. Make the appropriate selection in the Direction list.  
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 dialog is displayed. (Same form as the Add Relationship window.)
9. Make changes as necessary.
10. Click **OK**.

#### 2.3.4.1 Configure System-Supplied Relationships

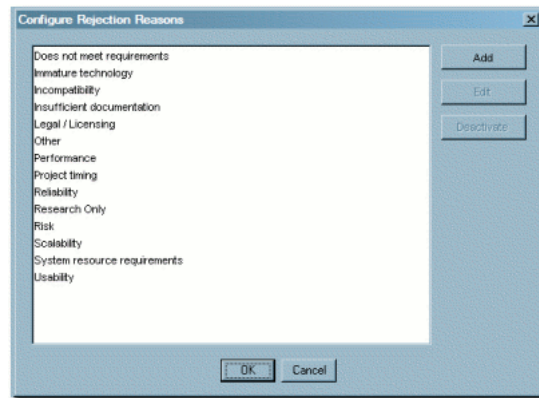
There are also system-supplied relationships in Oracle Enterprise Repository with limited read-only functionality to end users. Unlike standard asset relationships, system-supplied relationships are used in a context that requires their name and direction to be immutable. Therefore, these relationships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

### 2.3.5 Configure Rejection Reasons

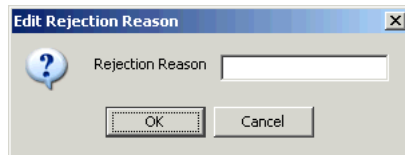
Determines the selection of Rejection Reasons available to users who reject previously used/downloaded assets. Rejection Reasons provide valuable local community feedback on assets.

1. Select **Configure Rejection Reasons** from the Actions menu. The Configure Rejection Reasons dialog is displayed, as shown in [Figure 2–11](#).



**Figure 2–11 Configure Rejection Reasons Dialog**

2. Click **Add**. The Edit Rejection Reasons dialog is displayed, as shown in [Figure 2–12](#).

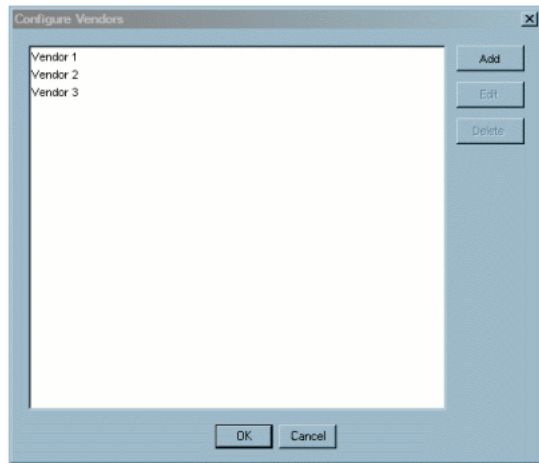
**Figure 2–12 Edit Rejection Reason Dialog**

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 dialog is displayed.
7. Make changes as necessary.
8. Click **OK**.

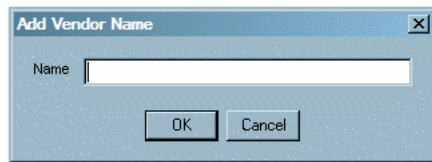
### 2.3.6 Configure Vendors

Defines/identifies vendors providing assets to the repository.

1. Select **Configure Vendors** from the Actions menu. The Configure Vendors dialog is displayed, as shown in [Figure 2–13](#).

**Figure 2–13 Configure Vendors Dialog**

2. Click **Add**. The Add Vendor Name dialog is displayed, as shown in [Figure 2–14](#).

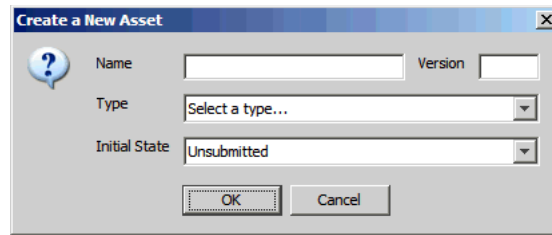
**Figure 2–14 Add Vendor Name Dialog**

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**.

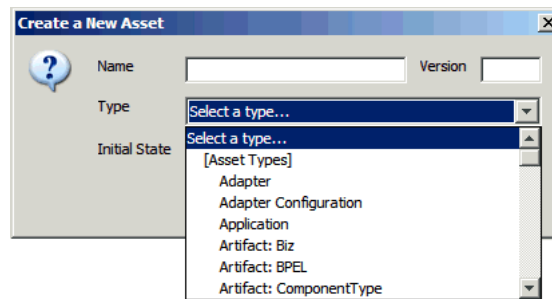
## 2.4 Advanced Asset Submission

This function allows a user (with the appropriate privileges) to submit assets through the Asset Editor rather than through the Web Console. This allows the user to enter more asset details upon 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.)

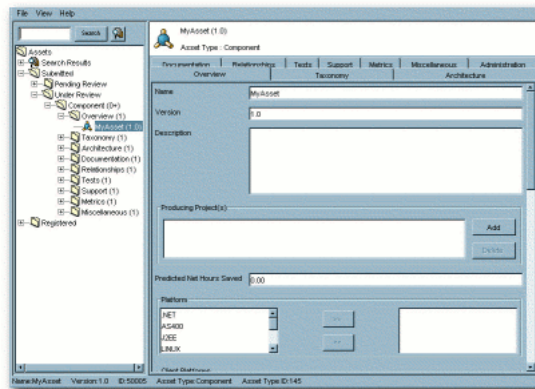
1. Open the File menu in the Asset Editor and select **New**. The Create a New Asset dialog is displayed, as shown in [Figure 2–15](#).

**Figure 2–15 Create a New Asset Dialog**

2. Enter the appropriate information in the Name and Version text boxes.
3. Select the appropriate Type template from the Type list, [Figure 2–16](#).

**Figure 2–16 Create a New Asset Dialog - Type List**

4. Click OK. The new asset appears in the Asset Editor, as shown in [Figure 2–17](#).

**Figure 2–17 Asset Editor - New Asset**

The asset is submitted for review and registration.

## 2.5 Asset/Compliance Template/Policy Migration

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, 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 Oracle Enterprise Repository.

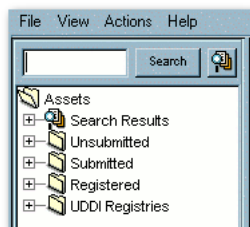
It is also possible to migrate an asset, compliance template, or policy to a different type. However, differing metadata elements does not transfer. For example, if the originating asset type uses a table on one of its tabs and is migrated to an asset type that does not have the same table element, the table and its metadata does not migrate. The table metadata element would have to be created in the new asset type.

## 2.5.1 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, as shown in [Figure 2–18](#).

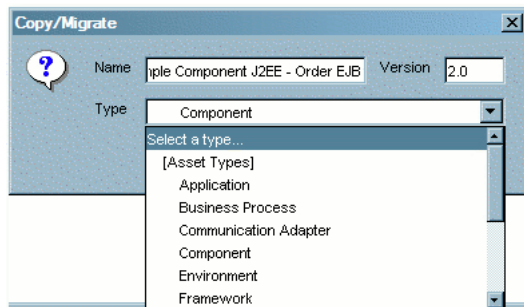
**Figure 2–18 Asset Editor - Search Button**



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

The Copy/Migrate dialog is displayed, as shown in [Figure 2–19](#).

**Figure 2–19 Copy/Migrate Dialog**



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 list.

Migrating assets between dissimilar types affects 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, as shown in [Figure 2–20](#).

**Figure 2–20 Asset Editor - Overview Tab**

Migrated Asset (1.0)  
Asset Type : Component

Tests | Support | Metrics | Miscellaneous | Administration  
Overview | Taxonomy | Architecture | Documentation | Relationships

Name: Migrated Asset

Version: 1.0

Description: <B>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.</B> <P> Order EJB provides the ability to view the details of a customer order. This Co...

6. Click the new asset's Administration tab, as shown in [Figure 2–21](#).

**Figure 2–21 Administration Tab**

Tests | Support | Metrics | Miscellaneous | Administration

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

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

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

Assign Users

Assigned To	Assigned Date	
		<input type="button" value="Add"/>
		<input type="button" value="Delete"/>
		<input type="button" value="Email Assigned Users"/>

Registered  
Registered By: Registered Date:

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

## 2.6 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 do they show up in a search; however, they would be available as related assets to active or inactive assets in the repository.
- Deleted
 

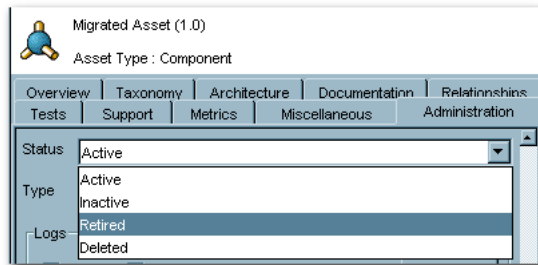
The status assigned to any asset that is removed from the repository. Deleted assets cannot be recovered or have their status reassigned.

### 2.6.1 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 modified.
2. Click the **Administration** tab.
3. In the Status list, select the status to be assigned to the asset, as shown in [Figure 2-22](#).

**Figure 2-22** Status List




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

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## Using the Type Manager

This chapter describes how to use the Type Manager in Oracle Enterprise Repository.

This chapter contains the following sections:

- [Section 3.1, "Overview"](#)
- [Section 3.2, "Launching the Type Manager"](#)
- [Section 3.3, "Creating a New Type"](#)
- [Section 3.4, "Configuring Tabs to Support Registration Workflow"](#)
- [Section 3.5, "Tab Elements"](#)
- [Section 3.6, "Adding Images for Type Manager Icons"](#)
- [Section 3.7, "Unique ID"](#)
- [Section 3.8, "Common Metadata Viewers"](#)
- [Section 3.9, "Viewing and Editing Type XML Schemas"](#)

### 3.1 Overview

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

- Asset
- Compliance Templates
- Policy

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

- Asset Types
- Compliance Templates Types
- Policy Types

These Types are patterns, various instances of which are created to accommodate the diverse artifacts that can be managed within Oracle 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 Oracle Enterprise Repository.

Oracle Enterprise Repository ships with several Types. These may be modified, or new types can be created using the Type Manager.

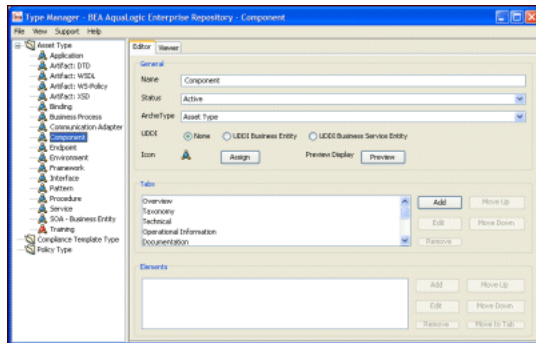
The Type Manager controls the organization and display of information for each artifact as it appears in the Asset Editor and in the Asset Detail.

## 3.2 Launching the Type Manager

This procedure is performed in the Asset Editor.

1. Select **Manage Types** in the Actions menu. The Type Manager page is displayed, as shown in [Figure 3–1](#).

**Figure 3–1 Type Manager Page**



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

### 3.2.1 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.

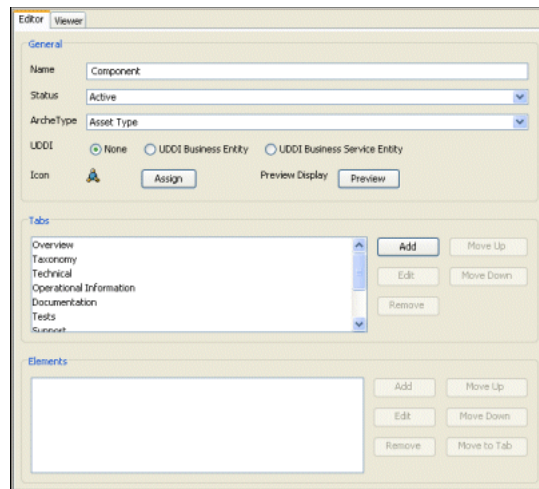
- [Section 3.2.1.1, "The Editor"](#)
- [Section 3.2.1.2, "The Viewer"](#)

#### 3.2.1.1 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.



**Figure 3–2 Editor Tab**



The Editor display is divided into three sections:

- **General**

Includes the type name, the usage status selector, the type icon selector, and a Preview button, which displays the asset, compliance template, or policy type as seen through 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 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.

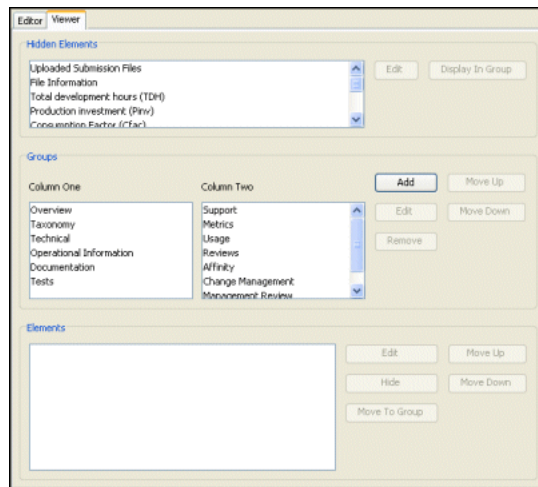
- Name
- Version
- Description
- File Information
- Notification Email

- Keywords

### 3.2.1.2 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 Oracle Enterprise Repository (the general user view of asset/compliance template information).

**Figure 3–3 Viewer Tab**



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 Oracle Enterprise Repository.
- Groups
  - Includes Column One and Column Two. These correspond to the two main columns in the main asset display in Oracle Enterprise Repository. Use the buttons on the right to configure the elements in the respective columns.
- Elements
  - Click 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.

---

**Caution:** Changes made to Types affect the display of all assets assigned to that type.

---

## 3.3 Creating a New Type

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

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**Note:** This action may alter reuse measurements.

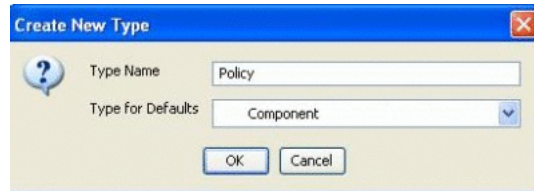
---



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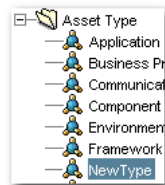
1. Select New in the File menu to open the Create New Type dialog is displayed, as shown in [Figure 3-4](#).

**Figure 3-4 Create New Type Dialog**



2. Enter the appropriate information in the Type Name text box.
3. In the Type for Defaults list, select one of the existing Types as the basic template for the new type.
4. Click OK. The new type appears in the tree, as shown in [Figure 3-5](#).

**Figure 3-5 Asset Type List**



## 3.4 Configuring Tabs to Support Registration Workflow

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 Oracle 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.

Whenever a tab is approved, a `TabApprovedEvent` event is triggered. This event along with the tab name and certain other metadata is sent to the workflows for processing. This event is used by the Multi-Tier workflows where depending on the tab approved and depending on the configuration, the workflows decide if the next tier in the approval process needs to be assigned or not.

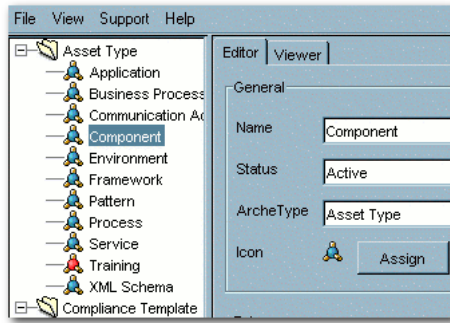
Also, the users can wire the `TabApprovedEvent` event to any of the pre-defined workflows such as `ChangeAssetLifecycle`. So, this is also tied to the Tab names.

### 3.4.1 Adding Tabs

You can add additional tabs in the Type Manager. Perform the following steps:

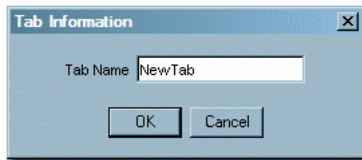
1. Select the Type to be modified, as shown in [Figure 3-6](#).

**Figure 3–6 Asset Type List**



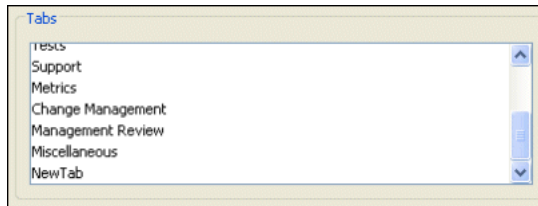
- In the Editor tab, click **Add** in the Tabs section. The Tabs dialog is displayed, as shown in [Figure 3–7](#).

**Figure 3–7 Tab Information Dialog**



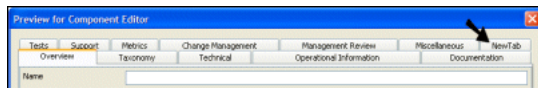
- Enter the appropriate information in the Tab Name text box.
- Click **OK**. The name for the new tab appears in the Tabs section list, as shown in [Figure 3–8](#).

**Figure 3–8 Tabs List**



- Click **Preview** in the General section. The preview page is displayed. The new tab is displayed, as shown in [Figure 3–9](#).

**Figure 3–9 Preview for Component Editor**



- Close the Preview page.
- Click **Save** to save the changes.

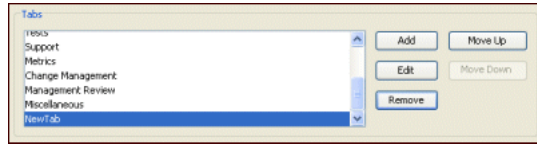
### 3.4.2 Change the Position of a Tab

To change the position of a tab, perform the following steps:

- Select the Type to be modified.

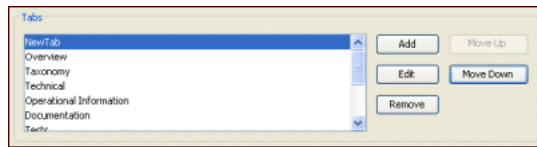
- In the Editor tab, select the tab to be moved.

**Figure 3–10 Tabs List**



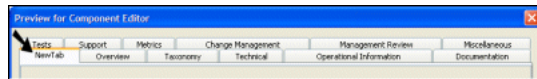
- Click **Move Up** or **Move Down**, as appropriate. Each click moves the tab one level. [Figure 3–11](#) shows the selected tab has moved from the bottom to the top of the list.

**Figure 3–11 Tabs List - Selected Tab at the Top**



- Click **Preview** in the General section. The preview dialog is displayed. Note new position of the tab in [Figure 3–12](#).

**Figure 3–12 Preview of the Component Editor**



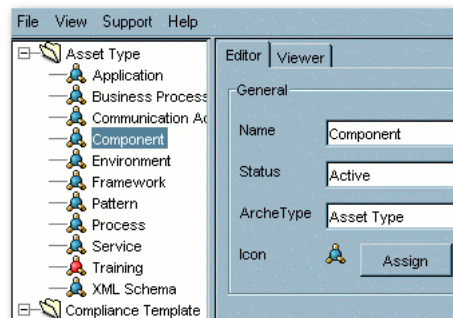
- Click **Save** to save the changes.
- Close the Preview window.
- Click **Save** to save the changes.

### 3.4.3 Editing Tabs

To edit a selected tab, perform the following steps:

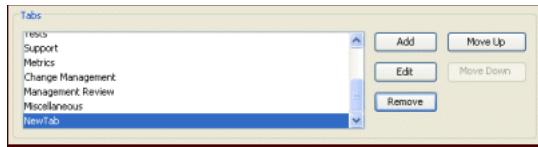
- Select the Type to be modified, as shown in [Figure 3–13](#).

**Figure 3–13 Asset Type List - Tab Selected**



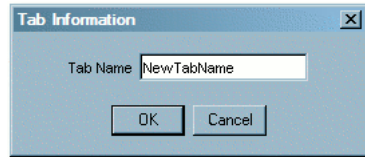
- On the Editor tab, select the tab to be edited, as shown in [Figure 3–14](#).

**Figure 3–14 Tabs List**



3. Click **Edit** and rename the tab. The Tab Information dialog is displayed, as shown in [Figure 3–15](#).

**Figure 3–15 Tab Information Dialog**



4. Click **OK**.
5. Click **Save** to save the changes.

### 3.4.4 Deleting Tabs

---

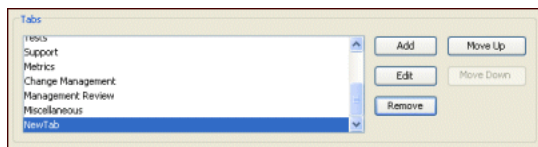
**Note:** Deleting a tab deletes all data associated with the tab.

---

To delete a tab, perform the following steps:

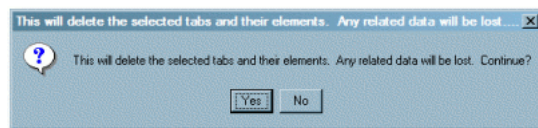
1. Select the Type to be modified.
2. On the Editor tab, select the tab to be deleted, as shown in [Figure 3–16](#).

**Figure 3–16 Tabs List**



3. Click **Remove**. A confirmation dialog is displayed, as shown in [Figure 3–17](#)

**Figure 3–17 Confirmation Dialog**



4. Click **Yes**. The tab is deleted, and no longer appears in the tabs list or in the preview.
5. Click **Save** to save the changes.

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. To delete a tab containing any of these elements the elements must first be moved to another tab.

## 3.5 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.
  - Minimum Value  
A validation rule for the minimum value of data in the field; accepts numerical entries.
  - Maximum Value  
A validation rule for the maximum value of data in the field; accepts numerical entries.
  - Decimal Places

A validation rule for specifying the number of decimal places 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.
- Lists -- 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 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



- 
- Indexed
      - If checked, the field must be populated with data before the asset is saved.
    - Entry Field
      - If checked, the field appears in More Search Options for that type.
    - Acceptable Values
      - 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 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

List of various categorizations available in Oracle Enterprise Repository.

- 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.
- 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.
- 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.
- UDDI Service Key -- This is used in conjunction with the Harvester Solution Pack to uniquely identify a service to be published to a UDDI Registry.
  - Display Name  
Element label that appears in the Asset Editor.
- UDDI Registries -- This is used in conjunction with the Harvester Solution Pack to display a list of UDDI Registries that the asset has been published to.
  - Display Name  
Element label that appears in the Asset Editor.
- XPath Metadata Viewer -- This is the XPath Common Metadata Viewer. For more information, see [Section 3.8.1, "XPath Common Metadata Viewer"](#).
  - Display Name  
Element label that appears in the Asset Editor.
  - Metadata Type  
The Entry Type which contains the XML-Formatted Entry Type.
  - XPath  
The xpath used to find the metadata within the given Metadata Type.
- Introspection Standard Attributes Viewer -- This is used in conjunction with the Harvester Solution Pack to display the metadata associated with the Harvester operations. It is usually added to asset types in the Harvester Solution Pack as an element called Harvester Properties. This viewer is also an example of the XSLT Common Metadata Viewers. For more details, see [Section 3.8.2, "XSLT Common Metadata Viewer"](#).
  - Display Name  
Element label that appears in the Asset Editor.
- Metadata Files -- This element performs like Asset Files. This element exposes XML-formatted metadata, which is attached to the asset by Harvester or Exchange Utility operations. The metadata is exposed to the Use/Download operations on the Asset. This element may not be used with the Viewer portion of the type and it never appears in Asset Detail.
  - Display Name  
Element label that appears in the Asset Editor.

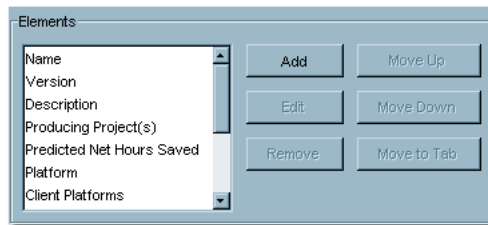
- Asset Files -- This element allows file to be exposed for asset Use/Download operations. Each file can be added by providing a name/url pair to the asset. This element may not be used with the Viewer portion of the type and it never appears in Asset Detail. It is added to all asset types, by default, as an element called "File Information".
  - Display Name  
Element label that appears in the Asset Editor.
- WSDL Summary -- This is used in conjunction with the Harvester Solution Pack to provide a link to the WSDL, which originally defined the service.
  - Display Name  
Element label that appears in the Asset Editor.

### 3.5.1 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.

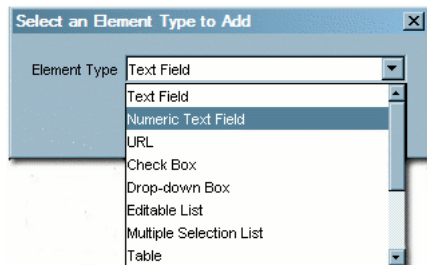
1. Select the Type to be modified.
2. On the Editor tab, click **Add** in the Elements section, as shown in [Figure 3–18](#).

**Figure 3–18 Elements Section**

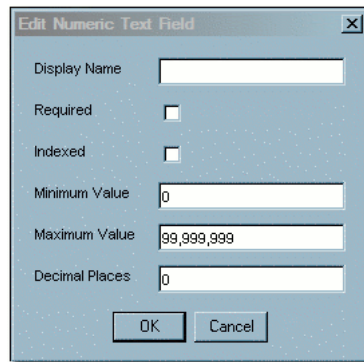


The Select an Element Type to Add dialog is displayed, as shown in [Figure 3–19](#).

**Figure 3–19 Select an Element Type to Add Dialog**



3. Select **Numeric Text Field** from the list.
4. Click **OK**. The Edit Numeric Text Field dialog is displayed.

**Figure 3–20 Edit Numeric Text Field Dialog**

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 Oracle Enterprise Repository searches.
8. Enter the appropriate information in the Minimum Value and Maximum Value fields.
9. When finished, click **OK**.

## 3.6 Adding Images for Type Manager Icons

You can add images to Type Manager icons. This section contains the following topics:

- [Section 3.6.1, "Icon Image Requirements"](#)
- [Section 3.6.2, "View/Select Available Type Icons"](#)

### 3.6.1 Icon Image Requirements

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

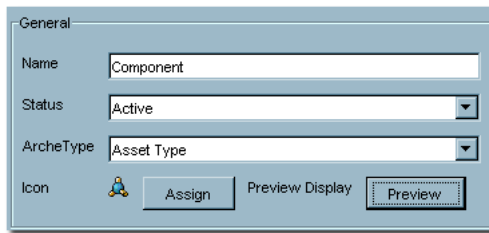
To add icon elements:

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.

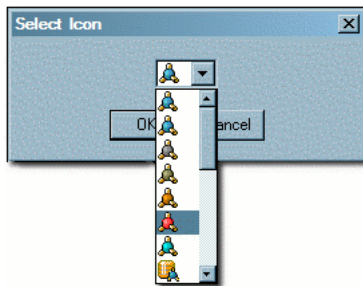
### 3.6.2 View/Select Available Type Icons

This procedure is performed in the Type Manager.

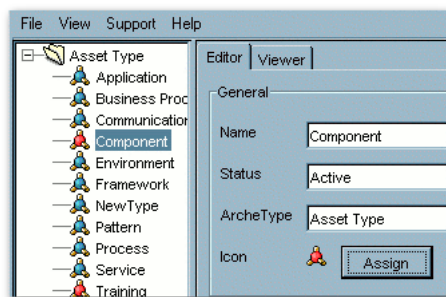
1. Select a Type.
2. On the Editor tab, click **Assign** in the General section, as shown in [Figure 3–21](#).

**Figure 3–21 General Section**

The Select Icon dialog is displayed, as shown in [Figure 3–22](#).

**Figure 3–22 Select Icon Dialog**

3. Select an icon from the list.
4. Click **OK**.
5. Click **Save** to save the changes. The new icon appears next to the Type in the list in the sidebar, as shown in [Figure 3–23](#).

**Figure 3–23 Asset Type List - New Type**

## 3.7 Unique ID

Every asset submitted to Oracle Enterprise Repository is automatically tagged with an Oracle Enterprise Repository-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 Oracle Enterprise Repository.

Oracle Enterprise Repository's Unique ID feature allows users with access to the Type Manager to add the Unique ID element to selected asset and/or compliance template

types. Only one Unique ID element may be added per type. This Unique ID element then appears in the Asset Editor display of assets of the selected types.

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

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

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

### 3.7.1 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.

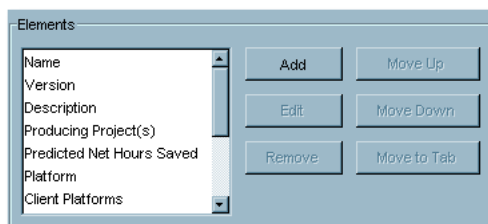
---



---

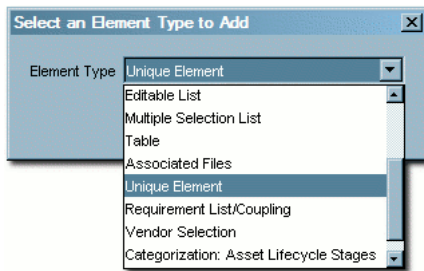
1. Select the Type to be modified.
2. Select the tab to which the Unique ID element is to be added.

**Figure 3–24 Elements Section**

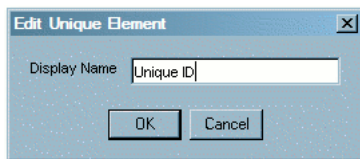


The elements assigned to that tab appear in the Elements section, as shown in [Figure 3–24](#).

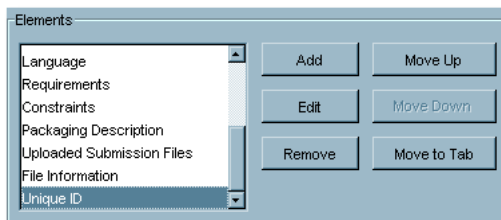
3. Click **Add** in the Elements section. The Select an Element Type to Add dialog is displayed, as shown in [Figure 3–25](#).

**Figure 3–25 Select an Element Type to Add Dialog**

4. Select Unique Element from the list.
5. Click OK. The Edit Unique Element dialog is displayed, as shown in [Figure 3–26](#).

**Figure 3–26 Edit Unique Element Dialog**

6. Enter the appropriate information in the Display Name text box in the Edit Unique Element dialog.
7. Click OK. The Unique ID element now appears in the Elements list, as shown in [Figure 3–27](#).

**Figure 3–27 Elements List - Unique ID**

8. Click Save.

### 3.7.2 Information Necessary for Custom Reporting

To include the Unique ID element in a custom report, the schema information for this element is required. This metadata is stored in a table which can be joined to the Assets table and is populated based on the value of certain System Settings. The location of the metadata and rules that control it are specified in this section.

- 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 appears 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

- `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.
- `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.

## 3.8 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 appears in the asset editor, it is for reference only. These viewers do not make the metadata editable.

This section contains the following topics:

- [Section 3.8.1, "XPath Common Metadata Viewer"](#)
- [Section 3.8.2, "XSLT Common Metadata Viewer"](#)

### 3.8.1 XPath Common Metadata Viewer

When added to an asset type you must specify a Common Metadata type and an XPath. When viewing an asset, if the asset has common metadata of that type, the

XPath is evaluated against the common metadata and the resulting items are displayed in the asset as a simple list.

### 3.8.2 XSLT Common Metadata Viewer

These viewers are imported into Oracle Enterprise Repository. 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 displays the metadata as defined by the XSLT of the viewer.

## 3.9 Viewing and Editing Type XML Schemas

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 through 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 through the Type Manager.
  - Available to users in the Admin role, and to others, based on specific System Settings.
  - Accessed through the Support menu in the Type Manager.

### 3.9.1 Configuring XML Schemas

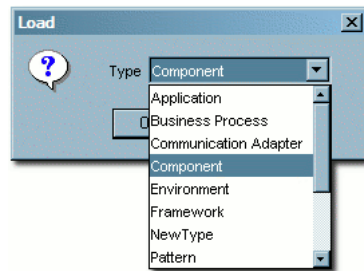
This section describes the configuring options available:

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

### 3.9.2 Using the Export Schema Feature

This procedure is performed in the Type Manager.

1. Select Export Schema from the File menu. The Load dialog is displayed, as shown in [Figure 3–28](#).
2. Select an XML schema type from the Type list.

**Figure 3–28 Load Dialog**

3. Click **OK**. The XML schema display is displayed, as shown in [Figure 3–29](#).

**Figure 3–29 XML Schema Display**

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.

---

### 3.9.3 Using the Type XML Editor

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

---

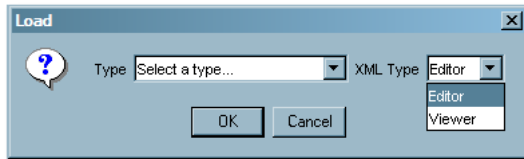
**Caution:** Improper changes to the XML source may render all types inoperable.

---

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 dialog is displayed.

3. Click **OK**. The XML schema display opens.
4. Select **Load** from the File menu in the blank window.
5. In the Load dialog, as shown in [Figure 3–30](#), select the type of XML schema to be edited from the Type list.

**Figure 3–30 Load Dialog**



6. Select Editor or Viewer from the XML Type list. These selections refer to the Editor and Viewer tabs in the Type Manager.
7. Click **OK**. The selected schema is displayed, as shown in [Figure 3–31](#).

**Figure 3–31 XML Schema Display**



8. Edit the schema as necessary.
9. Save the changes by selecting Save on the File menu.

---

---

## Import Export Tool

This chapter describes the features of the Import Export tool and how to use it to import items into and export items from the Oracle Enterprise Repository.

This chapter contains the following topics:

- [Section 4.1, "Overview"](#)
- [Section 4.2, "Using the Import/Export Tool"](#)
- [Section 4.3, "Starting the Import/Export Tool"](#)
- [Section 4.4, "Export Items from Oracle Enterprise Repository"](#)
- [Section 4.5, "Importing Items into Oracle Enterprise Repository"](#)

### 4.1 Overview

The Oracle Enterprise Repository Import/Export Tool is designed to allow the interchange of assets and related metadata between instances of Oracle Enterprise Repository.

Archives must be completely self-contained. That is, all dependent data required to fully describe all exported items are also exported. The dependencies are as follows:

- Assets, Compliance Templates, and Policies rely on Types
- Asset Types, Compliance Template Types, and Policy Types rely on Categorization Types and Relationship Types

For example, when exporting a single Asset, the resultant archive contains that Asset, its associated Asset Type, and any Categorization Types and Relationship Types on which that Asset Type depends. When importing, all data contained within the archive is imported into the destination instance of Oracle Enterprise Repository. Conflicts resulting from the existence of items with the same name are resolved in the following manner:

- Assets, Compliance Templates, Policies, and their respective Types must have unique names within the system. When an imported item has the same name as an item already in the destination Oracle Enterprise Repository instance, then "v2" is appended to the name of the new (imported) item. Each iteration of this occurrence results in a new version of the item: "v3," "v4," and so on. If the name of an imported item is already appended with a "Vn" designation, then "v2" is further appended to that name.
- Categorization Types merge data in the event of a destination Categorization Type of the same name. Categorizations in the source archive that are not present on the destination system are added to the existing (destination) Categorization Type.

- Source and destination Relationship Types sharing the same name and type are ignored; existing descriptive text is retained on the destination system. When source and destination Relationship Types share the same name, but are of different types, the name of the source Relationship type is appended with "v2," as described above, upon import to the destination system.

---

---

**Note:** If your instance of Oracle Enterprise Repository is or will be configured to be secured by Siteminder, then you must configure the policy server to ignore (or unprotect) the following URL to allow the Import/Export tool to function properly

*http://appserver.example.com/oe/services/*

---

---

## 4.2 Using the Import/Export Tool

This section describes how you can use the Import/Export tool to import or export objects into or from Oracle Enterprise Repository. This section contains the following topics:

- [Section 4.2.1, "Overview"](#)
- [Section 4.2.2, "The parameter.properties File"](#)
- [Section 4.2.3, "The Default Import Behavior"](#)

### 4.2.1 Overview

The Import/Export tool is available from within Oracle Enterprise Repository in the Admin tab, Import Export page. The Oracle Enterprise Repository user is required to have the Admin role specified by the system setting "Admin Role" (`enterprise.security.roletype.admin`).

The Import/Export tool is a Java WebStart program that downloads and launches when invoked.

The Export operation allows you to search for objects in Oracle Enterprise Repository to export. You can search for Asset Types, Assets, Categorization Types, and Relationship Types. The result of the Export operation is a .zip file with the searched for objects and all dependencies of that object. By default, a sample **parameter.properties** file is contained within the resulting .zip file.

The Import operation takes a .zip file that was exported by the Import/Export tool and load the contained items into Oracle Enterprise Repository. The behavior for the Import is determined by *META-INF/parameter.properties* or a series of default actions.

Oracle Enterprise Repository Administrators who must move data between different instances of Oracle Enterprise Repository must use the Import/Export tool or the Oracle Enterprise Repository OpenAPI. When the Import/Export tool is utilized, a `parameter.properties` file must be included in the .zip bundle prior to performing the import operation. The Export operation creates a placeholder file located in the `/META-INF` directory.

### 4.2.2 The parameter.properties File

Each import bundle contains a `/META-INF` directory. This directory contains a **parameter.properties** file that controls how the Import/Export tool behaves when the bundle is imported. If the **parameter.properties** file does not exist, it must be created prior to any Import operation.

### 4.2.2.1 Supported Parameters in the parameter.properties File

The supported parameters in the properties file are listed with the legal values for the parameter:

#### PreserveUUIDs

- **Used by:** Asset
- **Description:** This parameter retains the UUIDs of assets in the bundle rather than randomly generating new UUIDs
- **Values:**
  - **true** - UUIDs on newly created assets are UUID specified in the import bundle
  - **false** - UUIDs on newly created assets are randomly generated by Oracle Enterprise Repository

#### Standard.saver.assettype.props.duplicate.matching

- **Used by:** Asset Type
- **Description:** This parameter specifies how the import tool identifies that an asset type in the bundle is a duplicate of something that already exists in Oracle Enterprise Repository.
- **Values:**
  - **UUID** - A duplicate is determined if the UUID of the asset type specified in the import bundle matches the UUID of an asset type in Oracle Enterprise Repository.
  - **Name** - A duplicate is determined if the Name of the asset type specified in the import bundle matches the Name of an asset type in Oracle Enterprise Repository.

#### Standard.saver.assettype.props.duplicate.handling

- **Used by:** Asset Type
- **Description:** This parameter specifies how the import tool handles asset types in the bundle that are identified to be Duplicates of asset types in Oracle Enterprise Repository.
- **Values:**
  - **Create New Version** - Create a new asset type with the UUID and archetype from the import bundle, but a name which is versioned with a suffix of a "V" and a number (for example, Service V2). The asset type has a new UUID.
  - **Ignore** - Ignore the duplicate asset type from the bundle. Do not import the asset type and do not modify the asset type in Oracle Enterprise Repository.
  - **Merge** - Merge the asset type in Oracle Enterprise Repository with the duplicate asset type from the bundle. The Merge operation does not modify any of the elements of the asset type in Oracle Enterprise Repository. The operation is additive, appending elements in the asset type from the bundle to the asset type in Oracle Enterprise Repository. Matching of the elements is by the XML Mapping of the element. The rules are:
    - \* If the element's XML Mapping exists, then ignore the element.

- \* If the element's XML Mapping does not exist, then add it. The element is added by first locating the element's tab, and then creating the tab if it does not exist. The element is then added to the end of the tab.
- **Overwrite** - Replace the asset type in Oracle Enterprise Repository with the duplicate asset type from the bundle. The assets of the asset type in Oracle Enterprise Repository is not modified, although the display of these assets is affected.

**Standard.saver.relationshiptype.props.duplicate.handling**

- **Used by:** Relationship Type
- **Description:** This parameter specifies how the import tool handles relationship types in the bundle that are identified to be Duplicates of relationship types in Oracle Enterprise Repository. Duplicate relationship types are always matched by the Name and Direction characteristics of the relationship type.
- **Values:**
  - **Ignore** - Ignore the duplicate relationship type from the bundle. Create any asset relationships that use this relationship type and do not already exist in Oracle Enterprise Repository.
  - **Overwrite** - Replace the relationship type in Oracle Enterprise Repository with the duplicate relationship type from the bundle. This overwrites all information for the relationship type. This also creates any asset relationships that use this relationship type and do not already exist in Oracle Enterprise Repository.

**Standard.saver.metadata.props.duplicate.handling**

- **Used by:** CMF Metadata
- **Description:** This parameter specifies how the import tool handles blocks of CMF Metadata in the bundle that are identified to be Duplicates of CMF Metadata in Oracle Enterprise Repository. Duplicate CMF Metadata is always matched by the UUID of the metadata.
- **Values:**
  - **Ignore** - Ignore the duplicate CMF Metadata from the bundle.
  - **Overwrite** - Replace the CMF Metadata in Oracle Enterprise Repository with the duplicate CMF Metadata from the bundle. This overwrites all information for the CMF Metadata.

**Standard.saver.metadata.props.duplicate.handling**

- **Used by:** CMF Metadata Entry Types
- **Description:** This parameter specifies how the import tool handles CMF Metadata Entry Types in the bundle that are identified to be Duplicates of CMF Metadata Entry Types in Oracle Enterprise Repository. Duplicate CMF Metadata Entry Types are always matched by the Name of the metadata entry type.
- **Values:**
  - **Ignore** - Ignore the duplicate CMF Metadata Type from the bundle.
  - **Overwrite** - Replace the CMF Metadata Entry Type in Oracle Enterprise Repository with the duplicate CMF Metadata Entry Type from the bundle. This overwrites all information for the CMF Metadata Entry Type.



### 4.2.2.2 Sample parameter.properties File

A sample parameter.properties file with all options included is as follows:

```
##Name: parameters.properties
##Location: import_bundle.zip/META-INF/

##Legend:
## a double ## indicates a comment
## a single # indicates a command which can be used in an import bundle
## the text between []'s is the set of valid values for the parameter with comma
separating individual values

## for assets:
## This parameter will retain the UUIDs of assets in the bundle rather than
randomly generating new UUIDs
#PreserveUUIDs=[true,false]
#Standard.saver.asset.props.duplicate.handling=[Create New Version, Ignore,
Overwrite]
#Standard.saver.asset.props.duplicate.matching=[UUID, NameVersion]

## for assettypes:
#Standard.saver.assettype.props.duplicate.handling=[Create New Version, Ignore,
Merge, Overwrite]
#Standard.saver.assettype.props.duplicate.matching=[UUID, Name]

## for relationship types:
#Standard.saver.relationshiptype.props.duplicate.handling=[Ignore, Overwrite]

## For CMF metadata
#Standard.saver.metadata.props.duplicate.handling=[Ignore, Overwrite]

## For CMF metadata entry types
#Standard.saver.metadataentrytype.props.duplicate.handling=[Ignore, Overwrite]
```

## 4.2.3 The Default Import Behavior

If the `parameter.properties` file does not exist in a .zip bundle, the default behavior on Import is as follows:

### Asset Type

- An asset already exists, if an asset with the same name and version is in Oracle Enterprise Repository.
- Assets, which already exist, are then evaluated on the UUID.
  - Assets, which have the same name, version, and UUID, are ignored.
  - Assets, which have the same name and version, but a different UUID yield a new asset with a random UUID, same version, but a name that is versioned with a suffix of a "V" and a number (for example, Service Asset V2).
- An asset which does not already exist is created with the name and version specified in the import bundle. The UUID is randomly generated.
- When both assets in a relationship are included in the import bundle, the relationships are created.

### **Acceptable Value List**

- An acceptable value list already exists if an acceptable value list with the same name is in Oracle Enterprise Repository.
- Acceptable Value lists, which already exist, are merged. The values, which appear in the import bundle, but not in Oracle Enterprise Repository are added to Oracle Enterprise Repository. The values in Oracle Enterprise Repository are not modified.
- An acceptable value list, which does not already exist, is created with the same name and contents specified in the import bundle.

### **Categorization Type**

- A categorization type already exists if a categorization type with the same name is in Oracle Enterprise Repository.
- Categorization Types, which already exist, are merged. Categorization items, which appear in the import bundle, but not in Oracle Enterprise Repository are added to Oracle Enterprise Repository. Categorization items in Oracle Enterprise Repository are not modified.
- A categorization type, which does not already exist, is created with the same name and contents specified in the import bundle.

### **Relationship Type**

- A relationship type already exists if a relationship type with the same name is in Oracle Enterprise Repository.
  - Relationship Types, which have the same name and direction, are ignored.
  - Relationship Types, which have the same name and a different direction, yield a new relationship type with the bundle specified direction and a name that is versioned with a suffix of a "V" and a number.
- A relationship type, which does not already exist, is created with the same name and direction specified in the import bundle.

### **Metadata Entries**

- A metadata entry already exists if a metadata entry with the same UUID is in Oracle Enterprise Repository.
- Metadata Entries, which already exist in Oracle Enterprise Repository, are overwritten by the Metadata Entry in the Import Bundle.
- A Metadata Entry, which does not already exist, is created with the same UUID specified in the import bundle.

### **Metadata Entry Type**

- A metadata entry type already exists if a metadata entry type with the same UUID is in Oracle Enterprise Repository.
- Metadata Entry Types, which already exist in Oracle Enterprise Repository, are overwritten by the Metadata Entry Type in the Import Bundle.
- A Metadata Entry Type, which does not already exist, is created with the same UUID specified in the import bundle.

## 4.3 Starting the Import/Export Tool

The Import/Export Tool can be run as a stand-alone client or launched from within Oracle Enterprise Repository from the Admin screen. The Import/Export Tool requires JDK 1.4.2 or later.

### 4.3.1 Launching from Oracle Enterprise Repository

The Import/Export Tool is launched from the Admin tab. Due to the nature of the Import/Export Tool and the amount of data required for a comprehensive backup, the tool is restricted to users who are assigned the Admin role, such as the built-in admin user. The link to launch the Import/Export tool is visible only to users with the Admin role.

The Import/Export section on the Admin tab is enabled and configured by a property in system settings. If the section is not visible for a user with the Admin role, then verify that the following system setting is enabled and set to True:

```
cmee.importexport.enabled
```

---



---

**Note:** Since Import/Export is a self-contained tool utilizing REX, you are required to log in again after launching it from Oracle Enterprise Repository.

---



---

### 4.3.2 Launching from Command Line

Ensure that the JDK (1.4.2 or later) is on the command path and that `JAVA_HOME` is set. Copy the `impexp/` directory from the install media and execute the following:

- Win32 Platforms
  - `impexp.bat`
- Unix/Linux Platforms
  - `sh./impexp.sh`

### 4.3.3 Initial Startup

Upon launching the Import/Export Tool, the user is prompted to enter connection information for Oracle Enterprise Repository, as shown in [Figure 4-1](#).

---



---

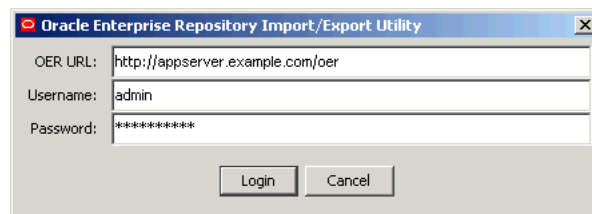
**Note:** You are not always prompted for credentials, except in the SSO environment.

---



---

**Figure 4-1** Oracle Enterprise Repository Import/Export Utility



- OER URL

Path to the Oracle Enterprise Repository installation, usually the same as the servlet path, as defined in the system settings. Example:  
*http://appserver.example.com/oe/*

- Username  
Name of a user who has been granted the Admin role within Oracle Enterprise Repository.
- Password  
Password for the user specified above.

To set a maximum time in milliseconds that an Import/Export tool can run before it is automatically killed by the job monitor, a new system setting must be configured:

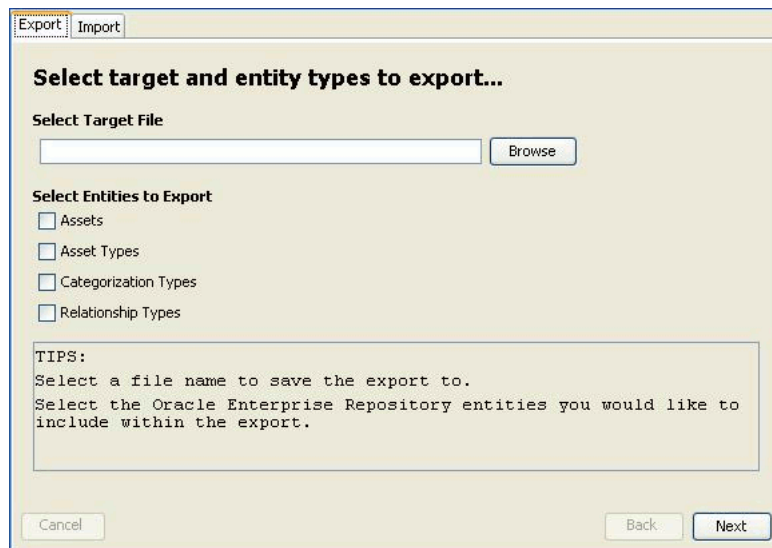
```
cmeecmee.extframework.impexp.monitor.maxruntime
```

## 4.4 Export Items from Oracle Enterprise Repository

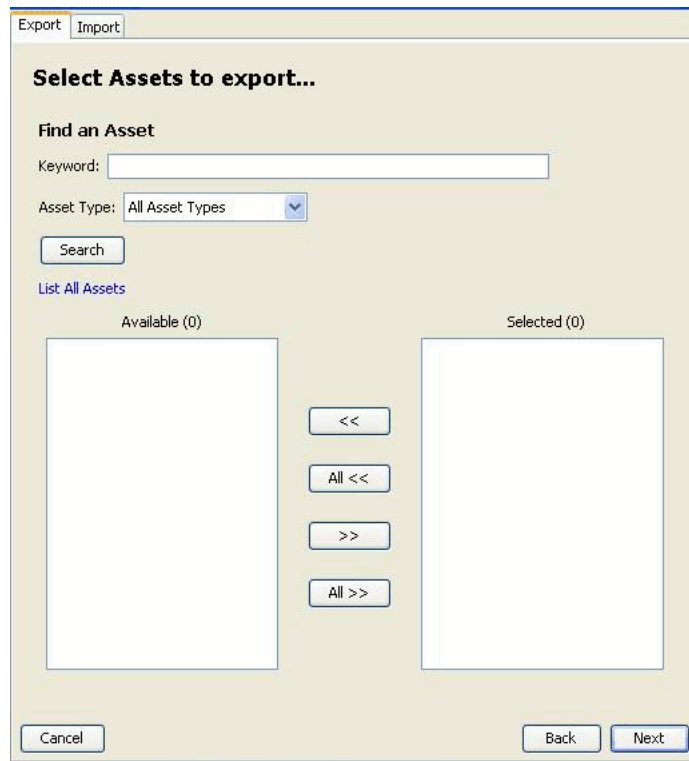
This procedure is performed on the Oracle Enterprise Repository Admin screen.

1. Click **Import Export** in the Admin sidebar.
2. Click **Import/Export Client**. The Import/Export Client is displayed.
3. Click the **Export** tab.

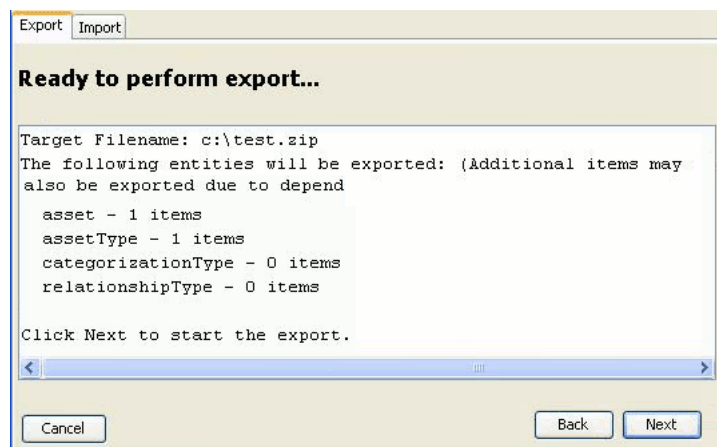
**Figure 4–2 Export Tab**



4. Enter the appropriate filename in the Select Target File text box or click **Browse** to select the target file for export.
5. Use the Select Entities to Export to identify the entities to be exported. This selection determines the specific behaviour of the export client in subsequent steps.
6. Click **Next**. The Select Assets to Export dialog is displayed, as shown in [Figure 4–3](#), as determined by the selection in Step 5.

**Figure 4–3 Select Assets to Export Dialog**

7. Use **Search** or click **List All** to display a list of items in the Available column.
8. Use the << and >> buttons to move selected items between the Available and the Selected columns.
9. Click **Next**. If more than one selection was made in Step 5 (Select Entities to Export), repeat Step 7 and Step 8 in the next Select dialog to select the next group of items for export.
10. Click **Next**. A list of the files to be exported is displayed in the Ready to Perform Export dialog, as shown in [Figure 4–4](#).

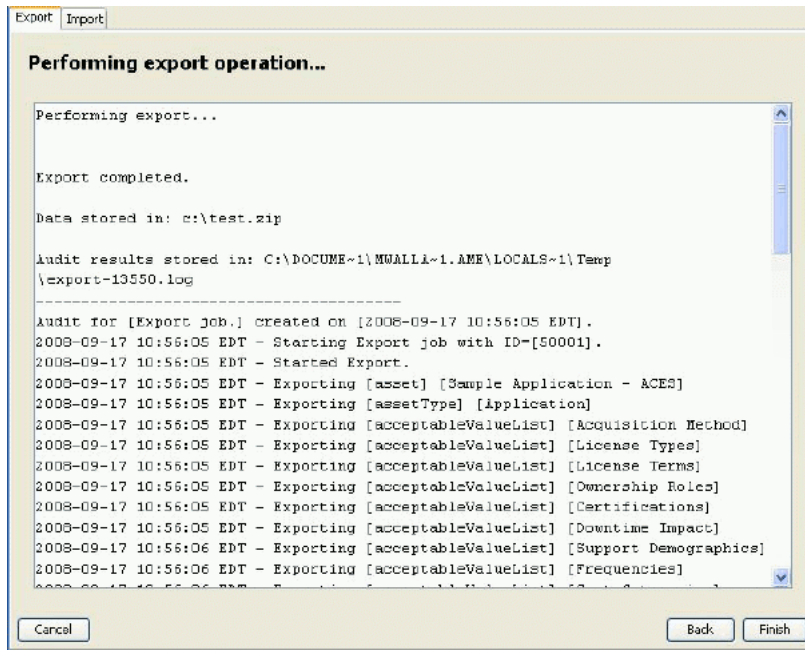
**Figure 4–4 Ready to Perform Export Dialog**

11. Click **Next**. A progress bar indicates the status of the export process.

**Note:** Variations in the size and complexity of the exported items affects the speed of this process and the behavior of the progress bar.

A summary of the export is displayed on completion, as shown in [Figure 4-5](#).

**Figure 4-5 Performing Export Operation Dialog**



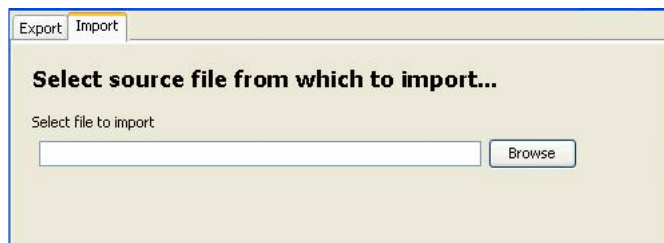
On Microsoft Windows platforms, Windows Explorer opens to the folder where the archive was saved (assuming system permissions allow shell execution from the application).

## 4.5 Importing Items into Oracle Enterprise Repository

This procedure is performed on the Oracle Enterprise Repository Admin screen.

1. Click **Import Export** in the Admin sidebar.
2. Click **Import/Export Client**. The Import/Export Client page is displayed.
3. Click the **Import** tab.
4. Enter the appropriate filename in the Select File to Import text box or click **Browse** to select the source file for the import in [Figure 4-6](#).

**Figure 4-6 Select Source File From Which to Import Dialog**



5. Click **Next**. The selected source file is listed in the Ready to Perform Import dialog is displayed, as shown in [Figure 4-7](#).

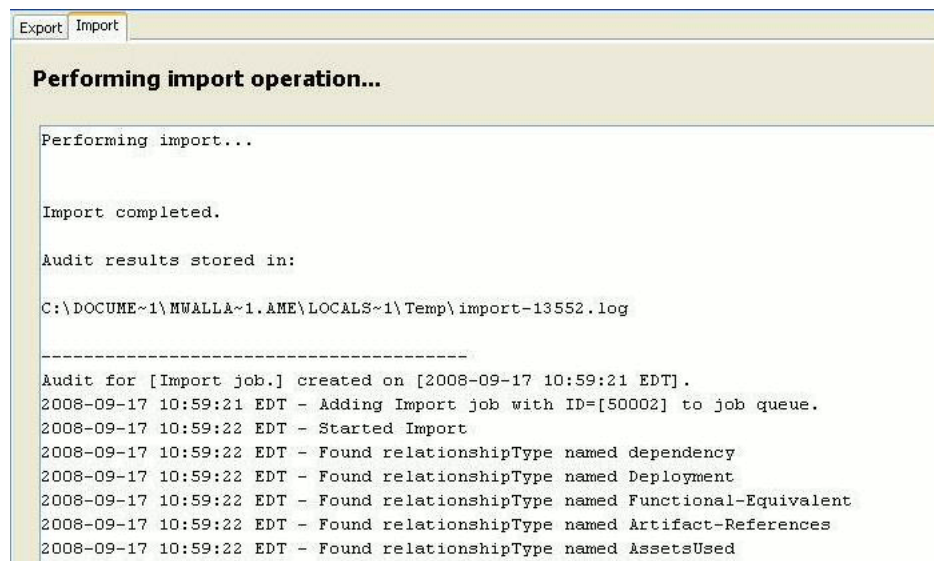
**Figure 4-7 Ready to Perform Import Dialog**



6. Click **Next**. A progress bar indicates the status of the import process. Variations in the size and complexity of the imported items affects the speed of this process and the behavior of the progress bar.

A summary of the import is displayed on completion, as shown in [Figure 4-8](#).

**Figure 4-8 Performing Import Operation Dialog**




---

**Note:** When running the Import/Export tool, importing larger data sets may cause available memory issues. To avoid, save the impexp.jnlp file locally by right clicking on the Import/Export Client link and selecting "Save link as..." option from the context menu. Edit the impexp.jnlp file to increase the default max-heap-size amount to better accommodate the size of the data sets being imported. If the machine importing the data set has enough available memory, change the max-heap-size parameter to a higher value, as in the following example: `<j2se version="1.6" max-heap-size="1024m"/>`

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