



User & Steward Guide

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1 Introduction

1.1 Introduction

1.1.1 Overview

OZONE is an ecosystem of software that enables users from numerous organizations to share data and manipulate it solely within browser memory. It comprises three specific products that interact with each other. Also, OZONE includes an inter-widget communication (IWC) component that enables its widgets to communicate solely within the browser. Each product performs a specific task:

- **HUD** – An organizational display that houses applications users find in Marketplace and want to store in their local environment, much like a bookmark in an Internet browser window, see section 2.
- **Marketplace** – A store—compared to a commercial application store like Apple’s App Store or Google Play—use it to search for and download applications to use in your instance of OZONE.
- **Webtop** – The framework where applications run and interact with each other. Webtop creates an environment where OZONE compatible applications can share a virtual network and core services that solely exist within the browser’s memory.
- **IWC** – The technology widgets use to communicate with each other within a browser *without* sending data back to their respective servers.

1.2 Global Toolbar

The Global Toolbar appears at the top of each product in the OZONE family. Use it to navigate between HUD, Marketplace and Webtop. From the toolbar, you can access your settings and Help resources, see notifications or create a listing.

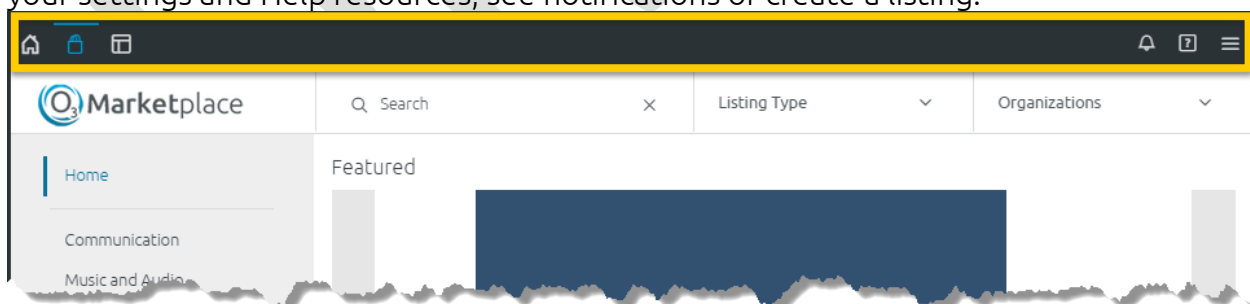








Figure 1: Global Toolbar



A blue Global Toolbar icon signifies which part of OZONE you are viewing and alerts you of unread notifications.

Each Global Toolbar icon is described:

-  -- HUD (Heads up display), see section 2.
-  -- Marketplace, see section 3.
-  -- Webtop [link]

-  -- Notifications, see section 1.2.1.
-  -- Help Content see section 1.2.2.
-  -- Main Menu see section 1.2.3.

1.2.1 Notifications

Notifications are located on the top-right side of the Global Toolbar. Marketplace stewards use them to alert users of upcoming events. If you have any unread notifications, the  changes to . When you click the notifications icon, notifications will display below it:

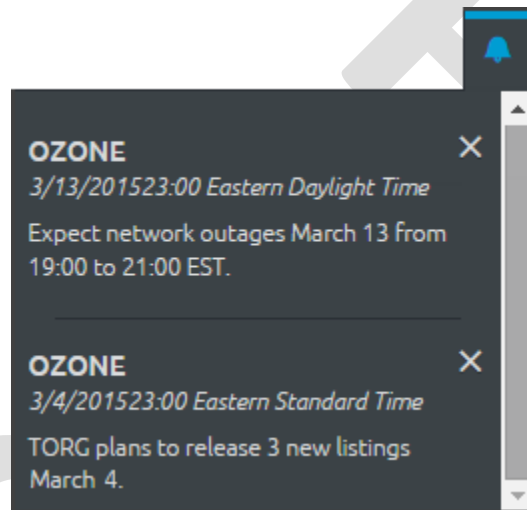


Figure 2: Notifications


1.2.1.1 Dismissing notifications

Click the X in the upper-right corner of a notification to dismiss it. If notifications are not dismissed by a user, they will disappear from the list when they expire.

1.2.2 Help

Click the  to access system help.

1.2.3 Main Menu

The Main Menu is identified by three parallel, stacked, horizontal lines on the right side of the Global Toolbar: . From there you can access your Profile, update Settings, and create or manage listings. The menu is described below:

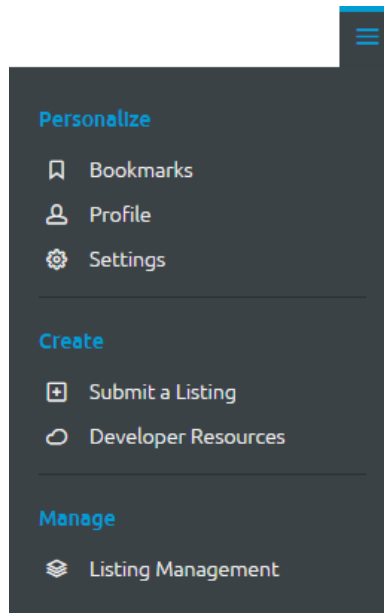


Figure 3: Main Menu

1.2.3.1 Personalize

Personalize contains links to your personalized, account functions.

- **Bookmarks** returns to the HUD which displays all listings that are linked to your account.
- **Profile** opens a window with your account information:
 - o Name
 - o Username
 - o Email
 - o A list of listings you own. Clicking a listing opens its Detailed Listing View in Marketplace.

Note: Owning a listing means you are responsible for it and probably created it. To see listings that you downloaded from the Store, click Bookmarks to open your HUD.
- **Settings** ask your preference for the Default Application Launch. By default, applications launch in a new tab. If you change the default setting to Open in Webtop all listings will launch on Webtop when you double-click them in the HUD. Also, they will be automatically bookmarked in your HUD.

1.2.3.2 Create

The Create section relates to the development of applications and their submission to Marketplace.

- **Submit a Listing** takes you to the Listing Create/Edit Form. Completing the form allows you to submit listings to Marketplace. For instructions see section 4.2: Listings: View, Create, Edit.
- **Developer Resources** opens a website selected by a Marketplace steward. It is intended to provide a resource that will help develop applications.

1.2.3.3 Manage

As a user, the Manage section displays information about listings you own. Stewards will see additional settings related to administering listing in their organization; Marketplace stewards can access system settings from this drop-down.

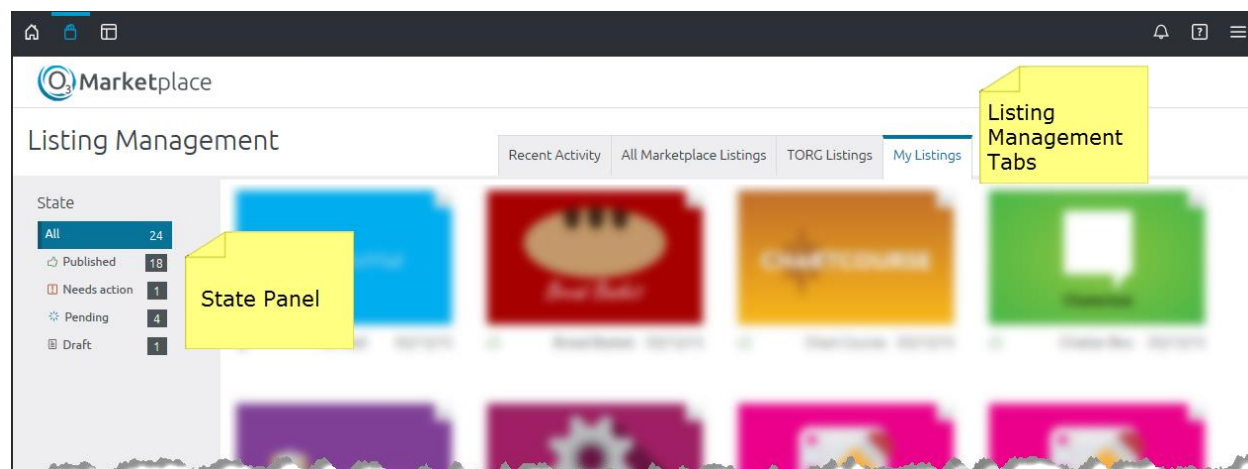


Figure 4: Listing Management Page

- **Listing Management** displays different information for different users. The following sections explain each field as it relates to a user or steward.

1.2.3.3.1 Listing Management Page for a User

As a **user**, you see all the listings that you own (including active, disabled and draft listings); the Recent Activity tab describes changes to listings you own; and the State panel on the left side provides an overview on the status of your listings:

- o **All** – Listings you own in the system
- o **Published** – Listings that are approved by Marketplace and organizational stewards in the system (this number includes listings that are Disabled)
- o **Needs action** -- Listings returned from a steward. To see the reason a listing was returned, click the arrow in the upper-right corner of the listing and select Read Feedback:

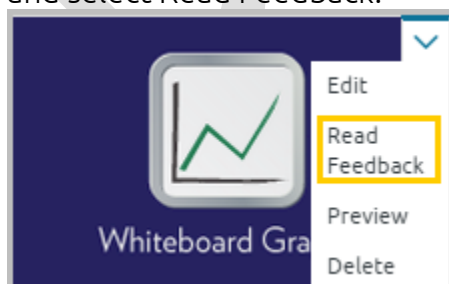


Figure 5: Listing Actions drop-down

- o **Pending** – Listings waiting for approval from a steward
- o **Draft** – Listings that you have not yet submitted for approval

1.2.3.3.2 Listing Management Page for a Steward

As a **steward**, you see multiple tabs on the Listing Management screen. The My Listings tab displays listings you own. The organizational tab(s) display listings that you oversee for a specific organization. All the organization's listings appear there. If you are the Marketplace Steward, all listings in the system appear under the Marketplace tab. The Recent Activity tab displays changes to all listings you oversee. The left-side State panel provides slightly different information than a user's left-side panel:

- **All** – Listings you oversee as a steward
- **Published** – Listings that are approved by Marketplace and organizational stewards within your organization (this number includes listings that are Disabled)
- **Needs action** – Listing waiting for your approval. For instructions regarding approving or returning listings see 5.3: Manage Listings.
- **(Pending) Org approved** – Listings waiting for Marketplace steward approval
- **Returned** – Listings returned to their owners
- **Draft** – Listings that you have not yet submitted for approval
- Marketplace Stewards also see an **Organization** filter on the left-side panel.
- All stewards see the **Enabled** section which allows them to filter by Enabled and Disabled listings (For information about Enabled and Disabled listings see 5.3: Manage Listings)
- **Marketplace Settings** (only visible to Marketplace Stewards) is the home page for Marketplace management tools and all customizations administered within the user interface (as opposed to backend code). To learn more about Marketplace settings see 5.4: Marketplace Manager.
- **Metrics** can provide data about listing Web traffic and Marketplace. It is only visible to Marketplace stewards and must be configured by one of them.

2 HUD (Heads up display)

HUD is a repository for all listings that you bookmark in Marketplace. From HUD, you can quickly find, launch or get help relating to each listing. Also, you can remove the bookmark from a listing.

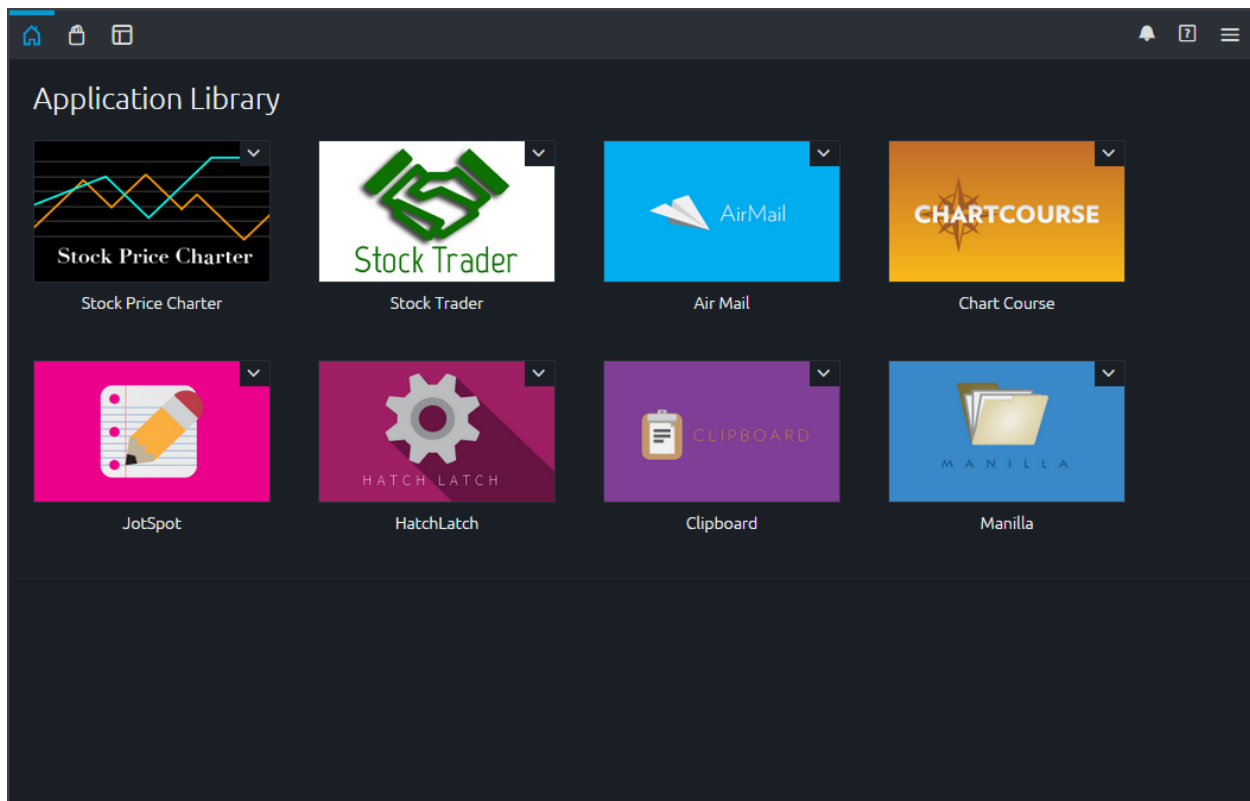


Figure 6: HUD

2.1.1 Accessing HUD

You can access HUD two ways using the Global Toolbar:

- Click the  icon on the far-left side or click the  icon on the far-right side and select Bookmarks:



Figure 7: Accessing the HUD from the Global Toolbar

2.1.2 Listing Actions from HUD

From HUD you can open, get help or remove the bookmark for a listing. Each action is found under the drop-down listing menu:

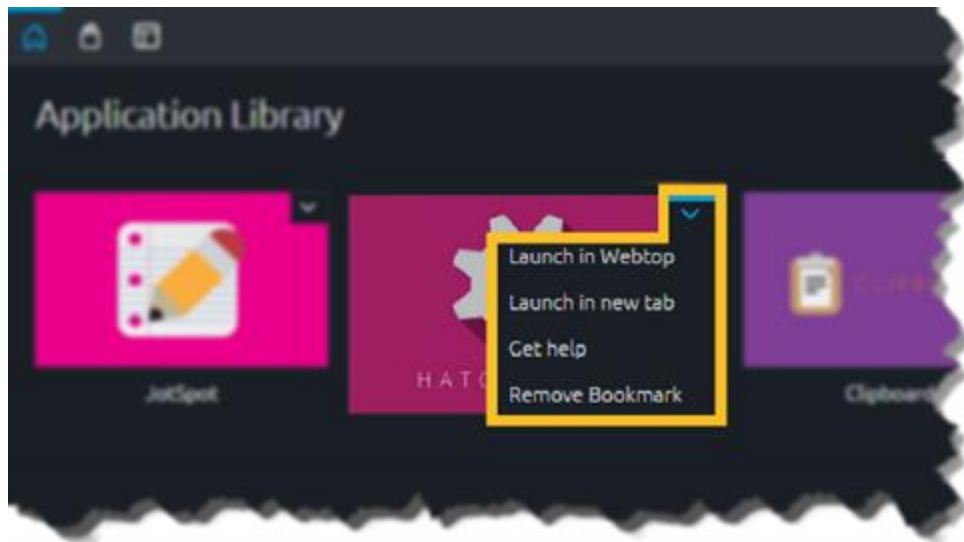


Figure 8: Drop-down listing actions menu

3 Webtop

3.1.1 *Webtop Overview*

Figure 9: Webtop

3.1.2 *Accessing HUD*

You can access Webtop two ways using the Global Toolbar:

4 Marketplace

4.1 **Marketplace Overview**

Use Marketplace to find the applications you need to do your work. You can explore it using search, filters and categories or add your own listings.

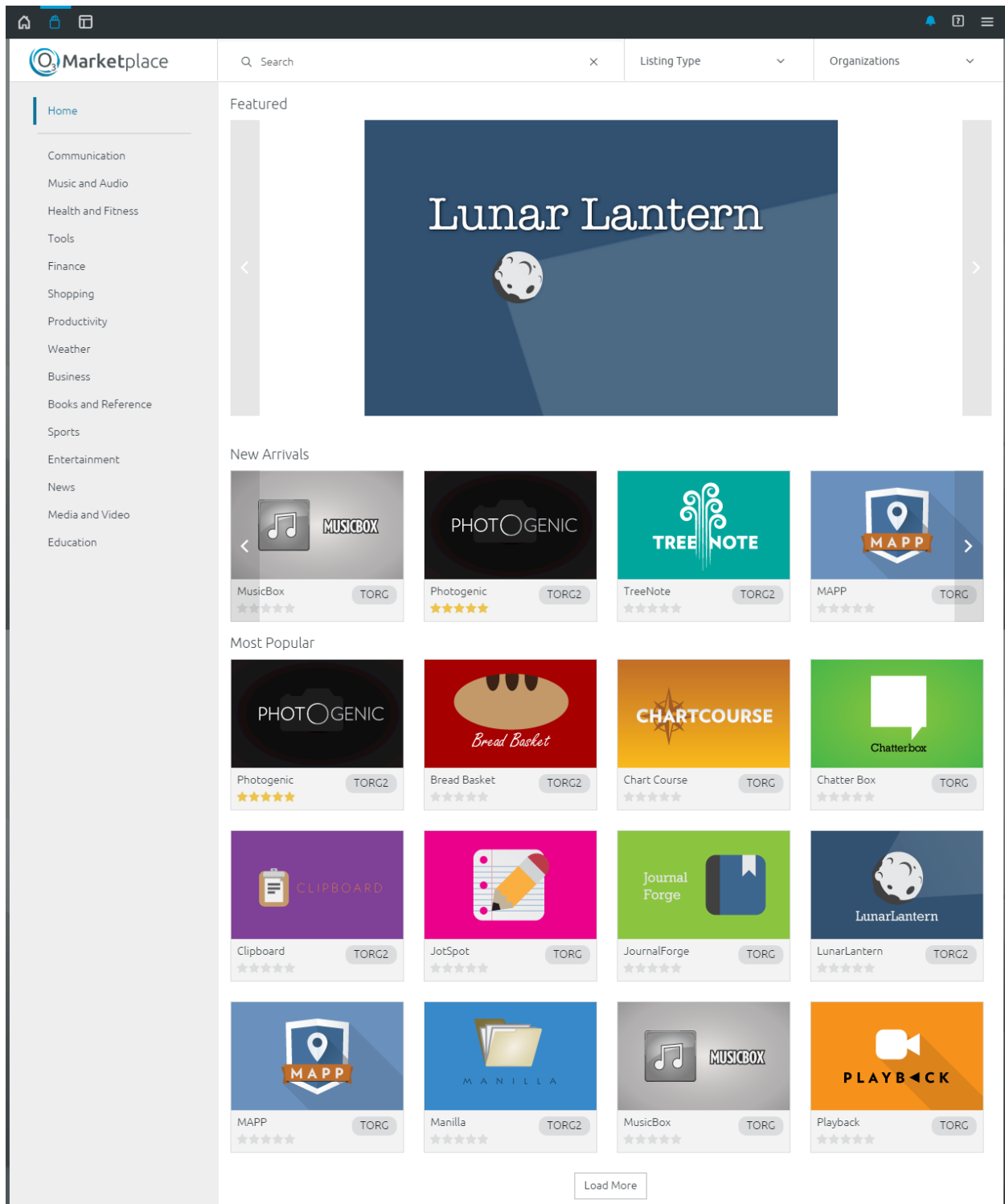


Figure 10: Marketplace Search and Discovery Page

When you enter OZONE, the first thing you'll see is the Marketplace Search and Discovery Page. It displays Featured, New Arrivals and the Most Popular listings. Use the categories on the left to reduce the number of listings you see on the page. From the top of the page, you can search for a listing and results will be returned based on listing name, description, tags, etc. A complete description of listings and search follow.

4.2 Listings: View, Create, Edit

4.2.1 Definition

Listing –Any software application or component that a user enters into Marketplace is called a “listing.” Like apps on smart phones, listings in Marketplace contain various types of Web content.

From Marketplace, you can save listings to your HUD or open them in a new browser tab.

4.2.2 Listing Short View

On the Search and Discovery Page, you see each listing’s icon, name, rating and organizational association. Hover over the listing to display its Short View.

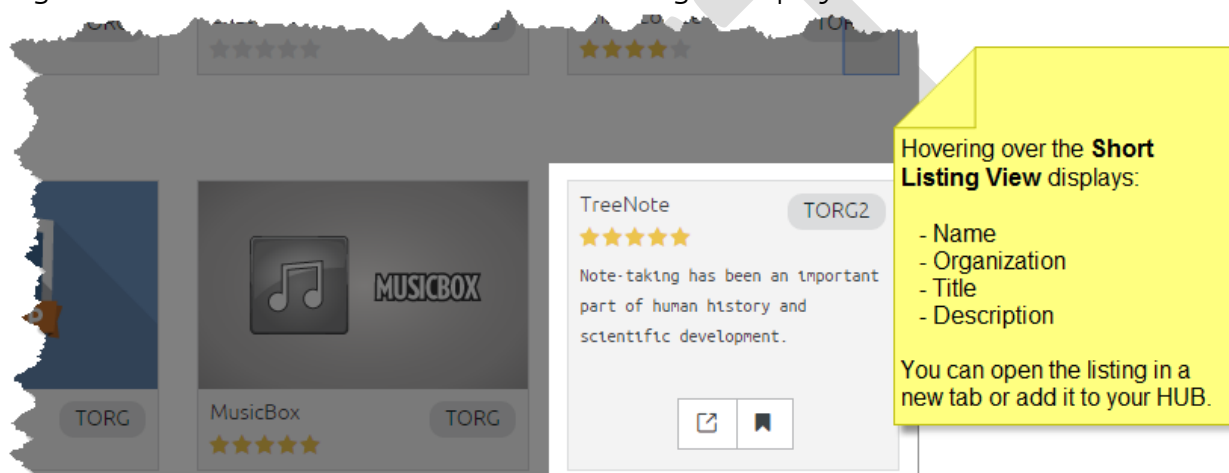


Figure 11: Listing Short View

From the Listing Short View you can read a short description, open or bookmark a listing:

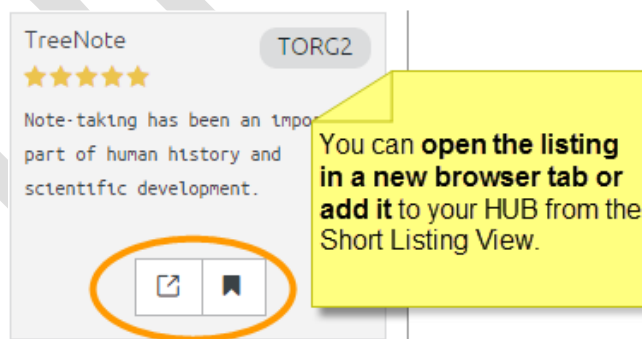


Figure 12: Listing Actions

4.2.3 Listing Detailed View

While the Listing Short View displays basic information, its Detailed View provides much more information. Click inside the view to open the Detailed Listing View. Each tab is described in this section:

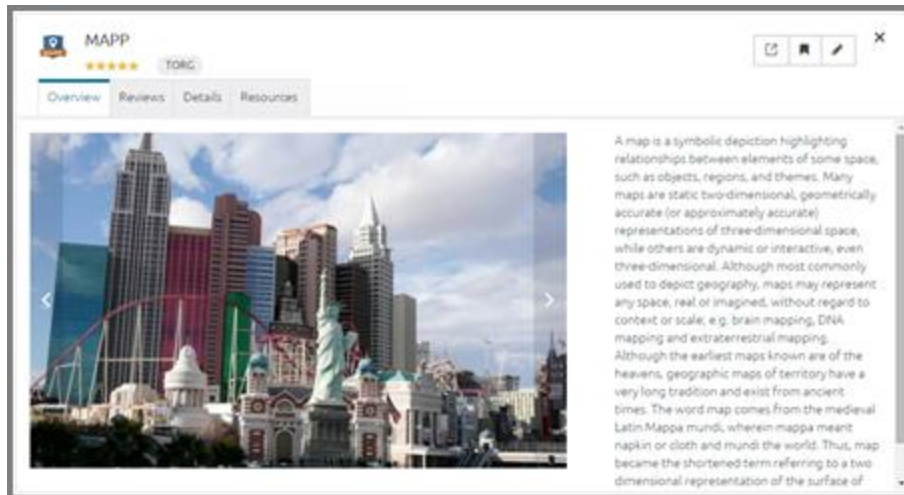


Figure 13: Listing Detailed View

The listing's header information and actions appear on each tab. Its header includes: listing icon, name, rating, organizational affiliation and actions such as opening, bookmarking and editing:

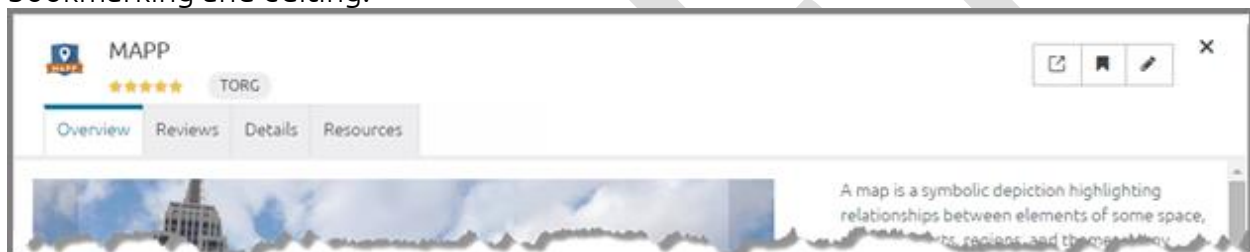


Figure 14: Listing Heading

Basic listing information:

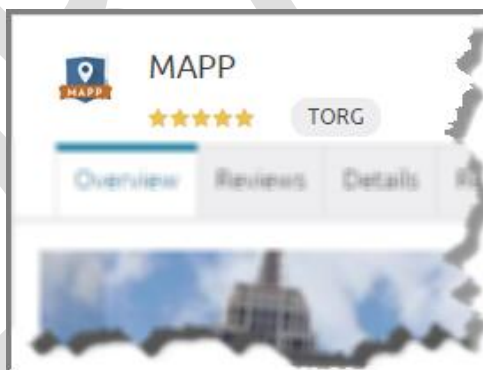


Figure 15: Left-side Detailed Listing View Header

At the top of the listing's Detailed View, you will see the listing's:

- Icon
- Name
- Rating
- Organizational association

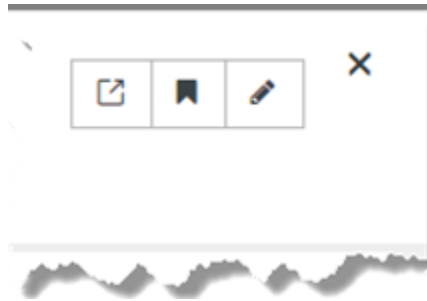


Figure 16: Right-side Detailed Listing View Header

The right-side of the listing's Detailed View houses three actions:

- **Open in a new tab**
- **Add to your HUB**
- **Edit** (if you are the listing owner)
- **Close**

4.2.3.1 Overview Tab

When you open the listing's Detailed View you'll see the Overview tab which includes screenshots and the long description.

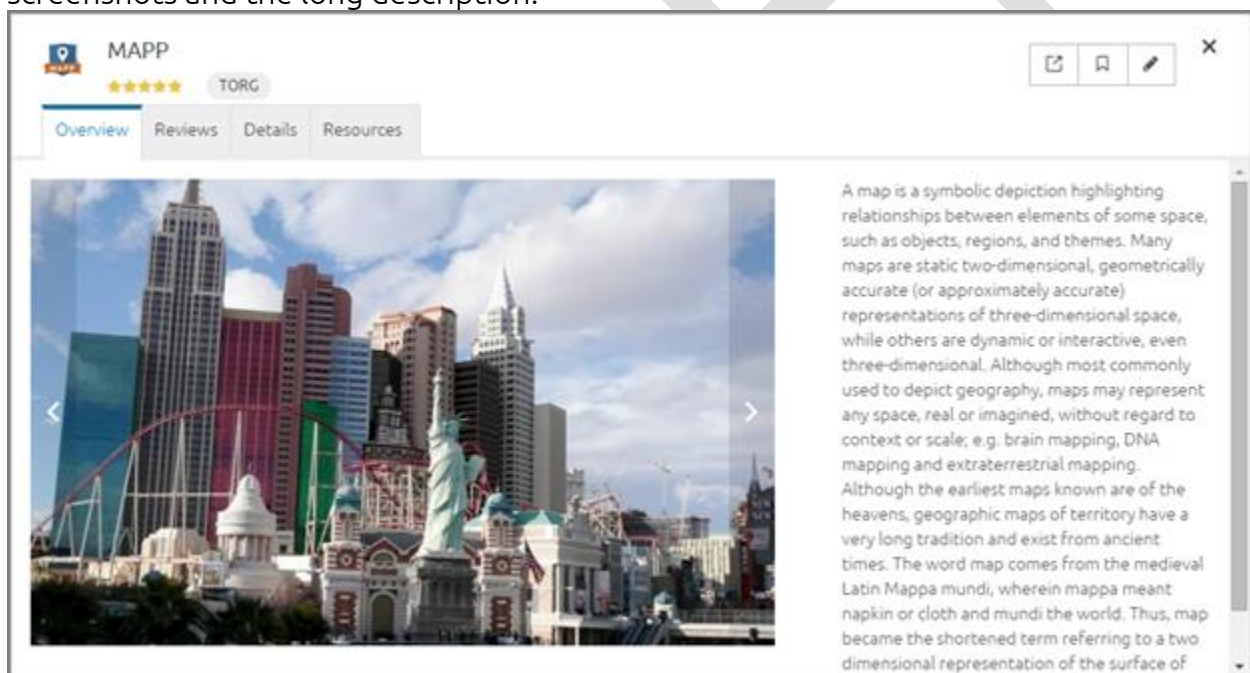


Figure 17: Overview Tab on the Listing's Detailed View

Here's what you should know about screenshots and the long description:

Screenshots – If there are more than one, use the arrows on the left or right to scroll. Click the screenshot for a larger view of it. Close the expanded view using the **x** in the upper-right corner. Scroll from one image to the next using the arrows on the right and left.

Long Description – This description can provide more content than the Short View. The listing owner enters the description and the owner or a content steward can edit it.

4.2.3.2 Reviews Tab

Click the Reviews tab to add a comment or rating. Also, you can read other users' comments and see how many users rated the listing. For instructions about writing or editing a review see section 4.2.7: Review/Edit a Listing.

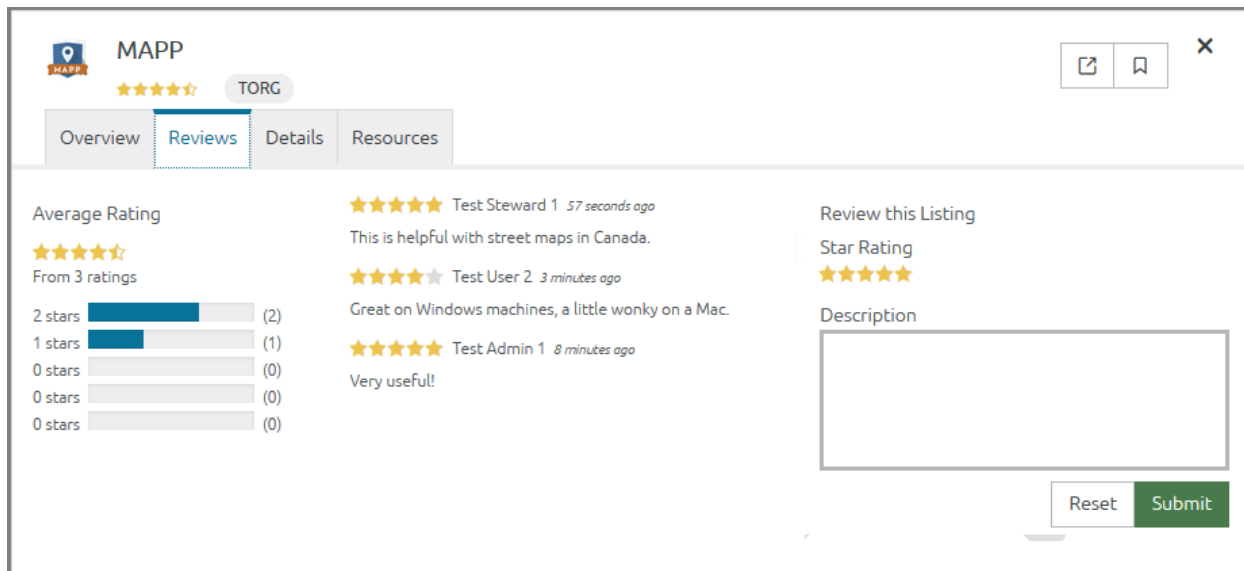


Figure 18: Review Tab on the Listing's Detailed View

4.2.3.3 Details Tab

The Details tab displays important information about the listing. The owner and stewards can edit it from the Create/Edit page. Descriptions of each field are included in the Create a Listing section 4.2: Listings: View, Create, Edit.

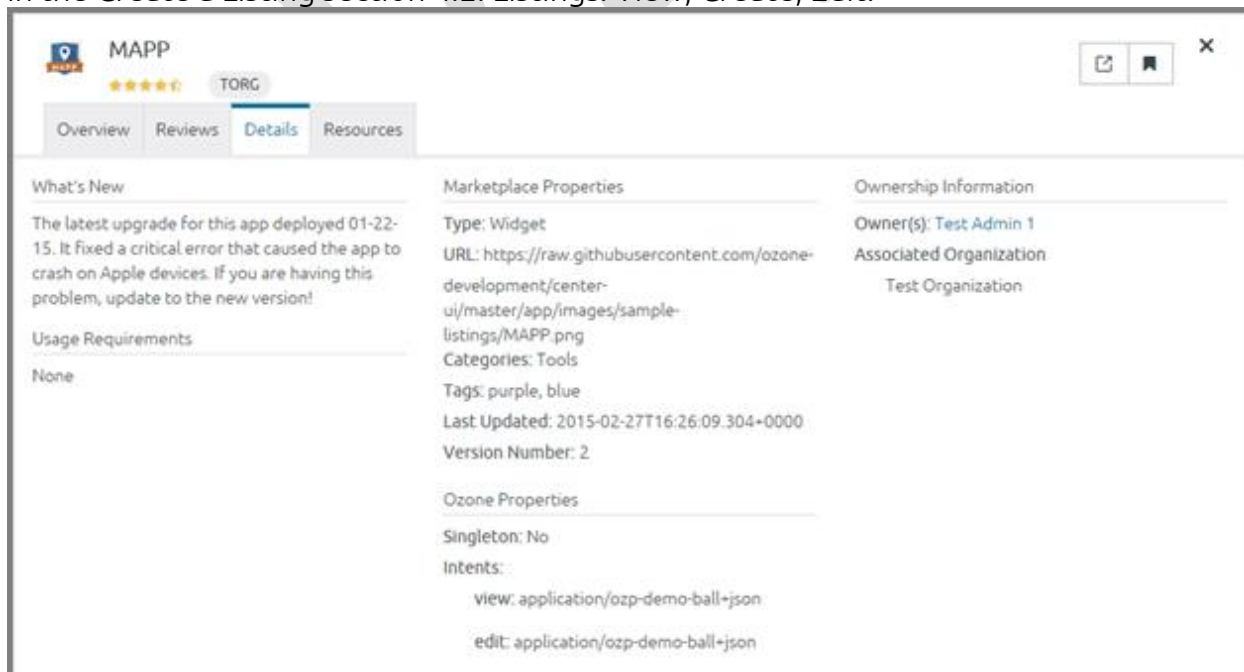


Figure 19: Details Tab on the Listing's Detailed View

4.2.3.4 Resources Tab

The Resources tab links to information and people that support the app. Descriptions of each filed are included in the Create a Listing section 4.2: Listings: View, Create, Edit.

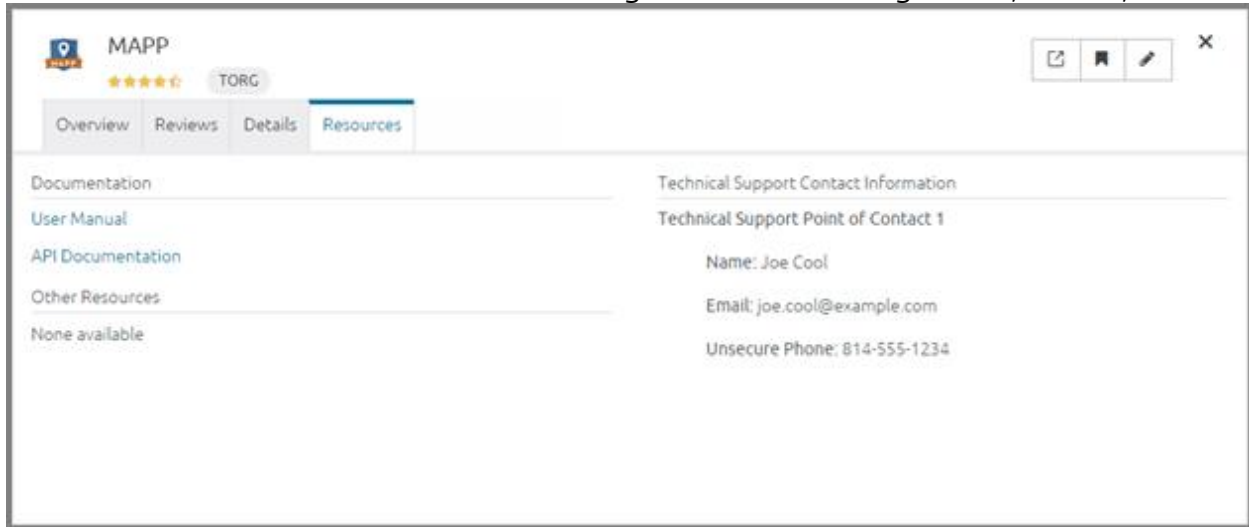


Figure 20: Resources Tab on a Listing's Detailed View

4.2.3.5 Administration Tab

The Administration tab only appears if you are the listing owner or a content steward. From this tab, stewards approve or reject listings; make them visible or hide them from Marketplace (Enabled) and decide if the listing will be featured in the banner at the top of the Discovery Page. Stewards can find instructions about administering listings in section 5.3: Manage Listings.

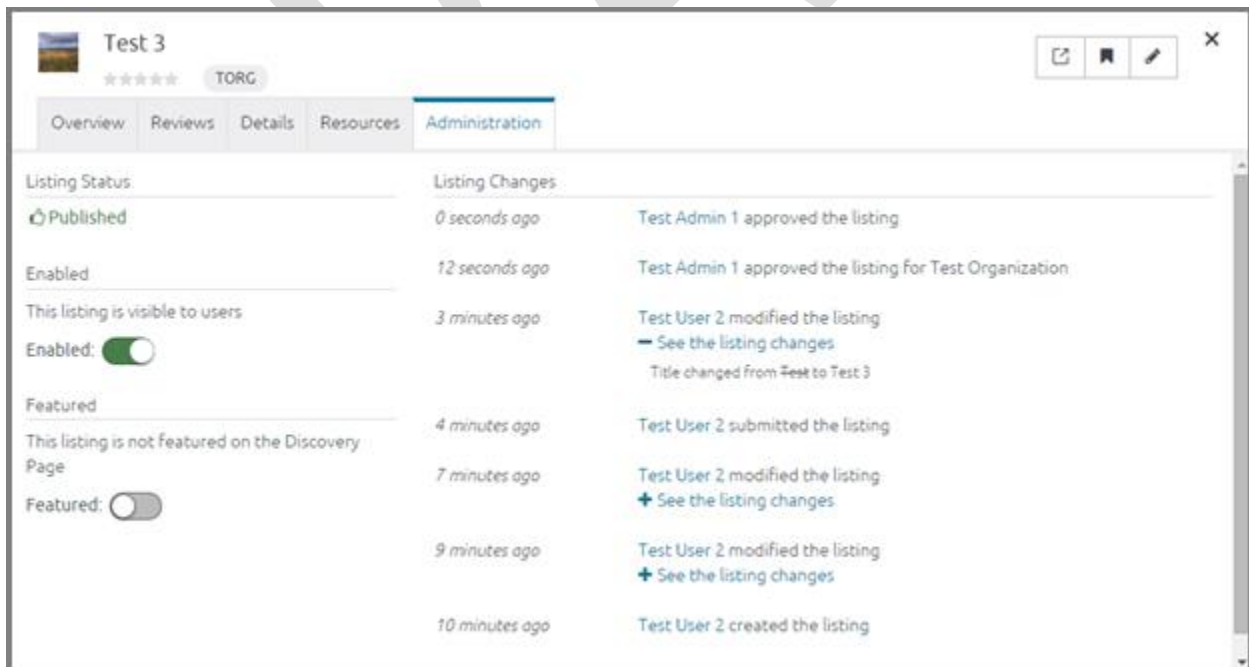


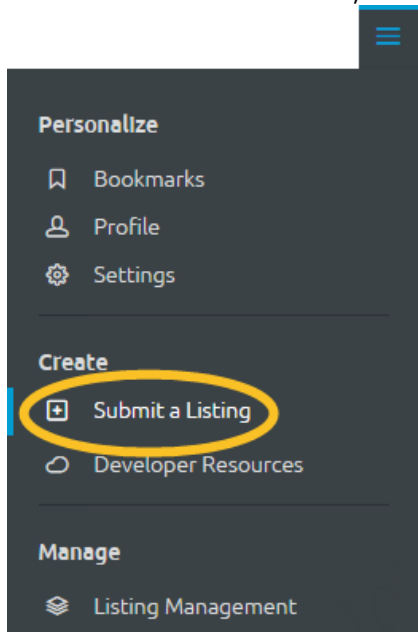
Figure 21: Administration Tab on a Listing's Detailed View




4.2.4 Create a Listing

Anyone can create a listing. Only stewards can approve them. This section explains how to create a listing and it defines each field on the Create/Edit Listing Form.

To create a listing:

1. From the Global Toolbar, click the drop-down Main Menu.



2. Select Submit a Listing
3. The Listing Create/Edit Form opens. To save the listing, you must enter a Name, Type and Owner. *At this point, you may save the listing without completing it. If you do this, you can open it from your Profile and Listing Management.*
4. Complete the listing. All fields are required unless marked optional.
5. Click  at the top of the form to save. The save icon switches to a green checkmark after saving.
6. To preview the listing, click .
7. When you are ready to publish the listing, click  to notify the Organizational Steward that the listing is ready for review. *Find steward approval instructions in section 5.3.1: Org Steward Listing Approval Instructions.*
8. After an organizational steward and Marketplace steward approve the listing, it will appear in Marketplace.

4.2.5 Fields on the Create/Edit Form

The following fields appear on the Create/Edit Listing Form:

4.2.5.1 Basic Listing Information

Create New Listing

All fields are required unless marked as "optional."

Basic Information

Listing Details

Resources

Graphics

Owners & Contacts

Name

Title of the listing.

May contain letters, numbers or symbols and must be 60 characters long or less.

Listing Type

Type of listing that is being submitted to the marketplace.

Categories

Category or categories in Marketplace where this listing fits best.

At least one is required.

Tags

Keywords that describe the listing.

May contain letters, numbers or symbols and must be 16 characters long or less.

Full Description

Overview describing the listing, the available features and its purpose. Appears in the detailed listing view.

May contain letters, numbers or symbols and must be 4000 characters long or less.

Short Description

Brief summary of the full description that briefly describes the listing. Appears in the mouseover listing view.

May contain letters, numbers or symbols and must be 100 characters long or less.

Reminders

Remember to portion-mark your descriptions!

Listings that are not portion-marked will be rejected.

If you have any questions during the submission process, please contact your organizations steward.

[View list of organization stewards >](#)

Figure 22: Create/Edit Listing Form – Basic Information

Field	Description	Additional information
Name	The name/title of the listing.	Names are not required to be unique within the system.
Listing Type	The listing technology description (e.g. Widget, Web Application).	
Categories	The categories associated with the listing used to group them. Stewards can add and remove categories as needed.	A listing can be associated with multiple categories.
Tags	A list of user generated words used to describe the listing. <ul style="list-style-type: none"> - Tags influence search results. - The tags appear on the Details tab of the Detailed 	Owners and stewards add tags from the Create/Edit Form.

	View.	
Full Description	This field can contain 4,000 characters. To make it easier for users to determine the nature of the listing, a succinct summary should be captured in the first few lines of the description.	The full description appears on the Overview tab of the listing's Detailed View.
Short Description	This 100 character description appears when a user hovers over a listing on the Search and Discovery Page.	This description can differ from the full description.

Create New Listing

All fields are required unless marked as "optional."

Listing Details

Version Number
Numerical identification of which release version is being submitted.
May contain letters, numbers or symbols and must be 255 characters long or less.

Listing URL
URL where this listing can be reached by users.
Must be a valid URL.

Usage Requirements
Details about what system, security, or other requirements must be met in order to use this listing. If none apply, write "None."
May contain letters, numbers or symbols and must be 1000 characters long or less.

What's New (optional)
Description of what is new or different in this latest version.
May contain letters, numbers or symbols and must be 255 characters long or less.

Intents
Intents are special instructions used for communicating between applications. If this application uses intents, list them here.

Reminders
Remember to portion-mark your descriptions!
Listings that are not portion-marked will be rejected.
If you have any questions during the submission process, please contact your organizations steward.
[View list of organization stewards >](#)

Figure 23: Create/Edit Listing Form – Listing Details

Field	Description	Additional information
Version Number	An identifier used to distinguish one version from another.	This is a free text field.
Listing URL	The address where users can access the listing	
Usage Requirements	A list of any required dependencies	Example: This listing requires Adobe Flash and functions best

		on IE9 or newer browsers.
What's New (optional)	A message from the owner or a stewards	Example: This release enhanced the search features and corrected a bug with editing.
Intents	Intents are the instructions for carrying out a listing's intentions.	There are three main aspects of intents: <ul style="list-style-type: none"> - Action - Data Type - Send/Receive

4.2.5.2 Resources

Figure 24: Create/Edit Listing Form – Resources Section

Field	Description	Additional information
Resources (optional)	Links to tools that will help people use the listing	Examples: User Guides, reference sites

The next section of the form houses information about all the graphics in the listing. To make the listing more useful, add graphics that help users understand what the listing does and how to use it.

Note: Images must be smaller than 1MiB (1.048576 megabytes). Specific pixel size restrictions appear on the Listing Create/Edit Form.

4.2.5.3 Graphics

Create New Listing

All fields are required unless marked as "optional"

Graphics

Small Icon
Must be at least 16px wide x 16px tall.
Image is required.
 No file chosen

Large Icon
Must be 30px wide x 30px tall.
Image is required.
 No file chosen

Small Banner
Must be at least 220px wide x 137px tall.
Image is required.
 No file chosen

Large Banner
Must be at least 600px wide x 375px tall.
Image is required.
 No file chosen

Screenshots
At least one screenshot is required.

Reminders
Remember to portion-mark your descriptions!
Listings that are not portion-marked will be rejected.
If you have any questions during the submission process, please contact your organizations steward.
[View list of organization stewards >](#)

Figure 25: Create/Edit Listing Form – Graphics

The following figure displays the large and small banner icons on the Search and Discovery Page:

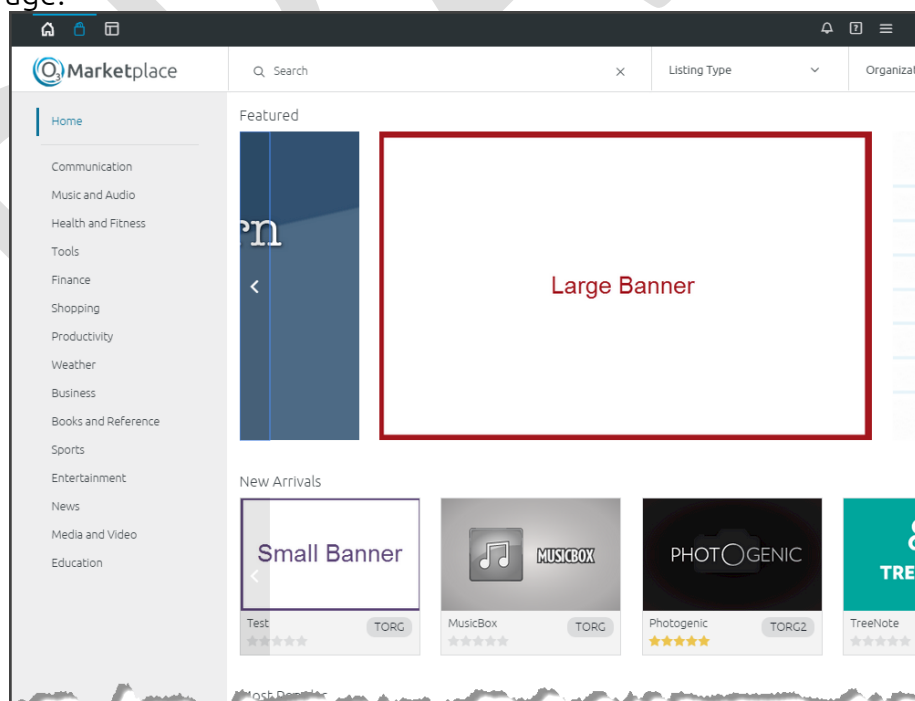


Figure 26: Large and Small Banner Image Examples

Field	Description	Additional information
-------	-------------	------------------------

Small Icon	Used to identify the listing in Webtop.	
Large Icon	Appears in the upper-left corner of the listing's Detailed View	
Small Banner	This icon appears on the Search and Discovery Page in the New Arrivals and Most Popular sections. Also, this icon appears in the search results.	It is the most common view users will have of a listing.
Large Banner	When a listing is featured on the Search and Discovery Page, this icon appears.	
Screenshots	Houses the images that appear in the Overview tab on the listing's Detailed View.	<p>You can add infinite screenshots. The system asks for a:</p> <ul style="list-style-type: none"> - Preview Image <i>Appears on the Overview tab</i> - Full Size Image <i>Opens outside the Overview tab after a user clicks the Preview Image</i>

4.2.5.4 Owners & Contacts

The next section of the Create/Edit Form addresses owners and contacts. This establishes who is responsible for the listing, who can see it in Marketplace and who should be contacted regarding it:

Figure 27: Create/Edit Listing Form – Owner & Contacts Section



Field	Description	Additional information
Associated	Use this field to identify	A drop-down list displays all

Organization	which organization will see the listing in Marketplace.	organizations.
Owners	Pre-populated with the name of the person who creates the listing, ownership can be reassigned by typing a new owner's name in the owner field on the listing page.	<ul style="list-style-type: none"> - To add more than one listing owner, type the name of the next owner after selecting the first one. - Only a listing's owner(s) and content stewards can edit the listing.
Contacts	A field that can contain the contact's information that the submitter wishes to enter (e.g., email, phone).	<ul style="list-style-type: none"> - Click Add to associate more than one contact with a listing. - The Marketplace steward decides if the field is optional or required.

4.2.6 Edit a Listing

Only listing owners and content stewards can change listings.

To edit a listing:

1. Click the listing icon to open the listing's Detailed View.
2. From the top-right, click , this will open the Create/Edit Form.
3. Update the listing, then, click  to save. The save icon switches to a green checkmark after saving. The listing will update in the system.

4.2.7 Review/Edit a Listing

Any user can add a comment or rating to a listing. Only content stewards and the person who submits the Review can edit or delete it.

To submit a review:

1. Click the listing icon to open the listing's Detailed View.
2. Click the Reviews tab.
3. Your review options are located on the right, enter a Star Rating and type a comment in the Description field:

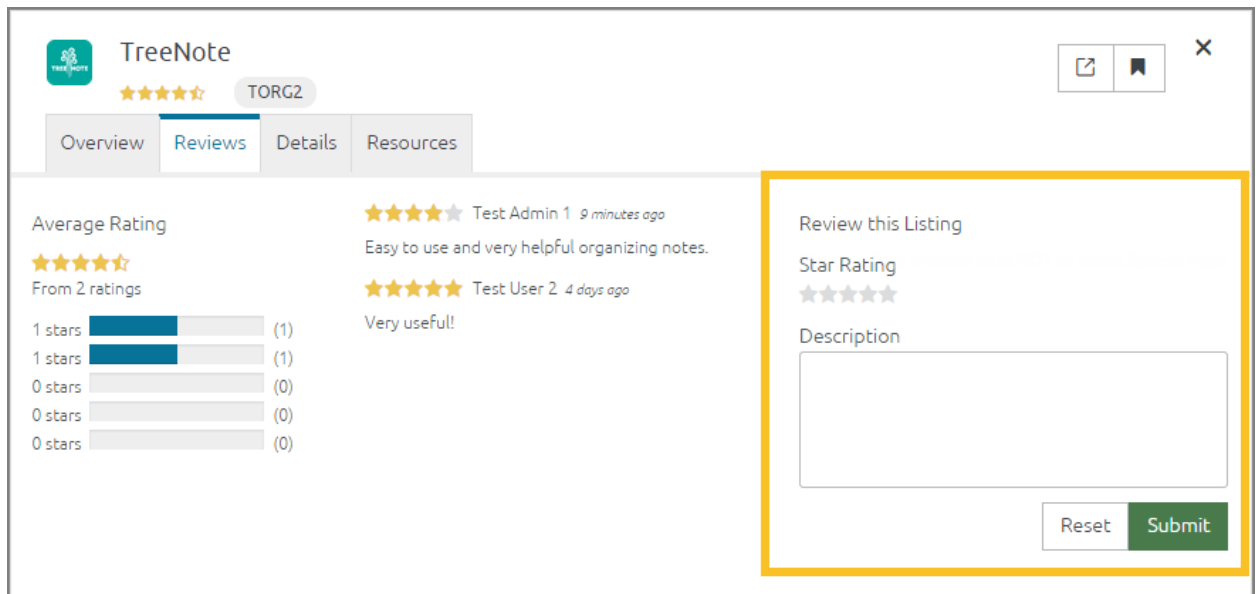


Figure 28: Review section of Detailed Listing View

4. Click Submit, your comment will be added to the listing Reviews and affect the Star rating.

4.2.8 Search

There are a number of ways to find listings in Marketplace. Remember that only Approved, Enabled listings appear in search results. This section explains Marketplace's searching tools:

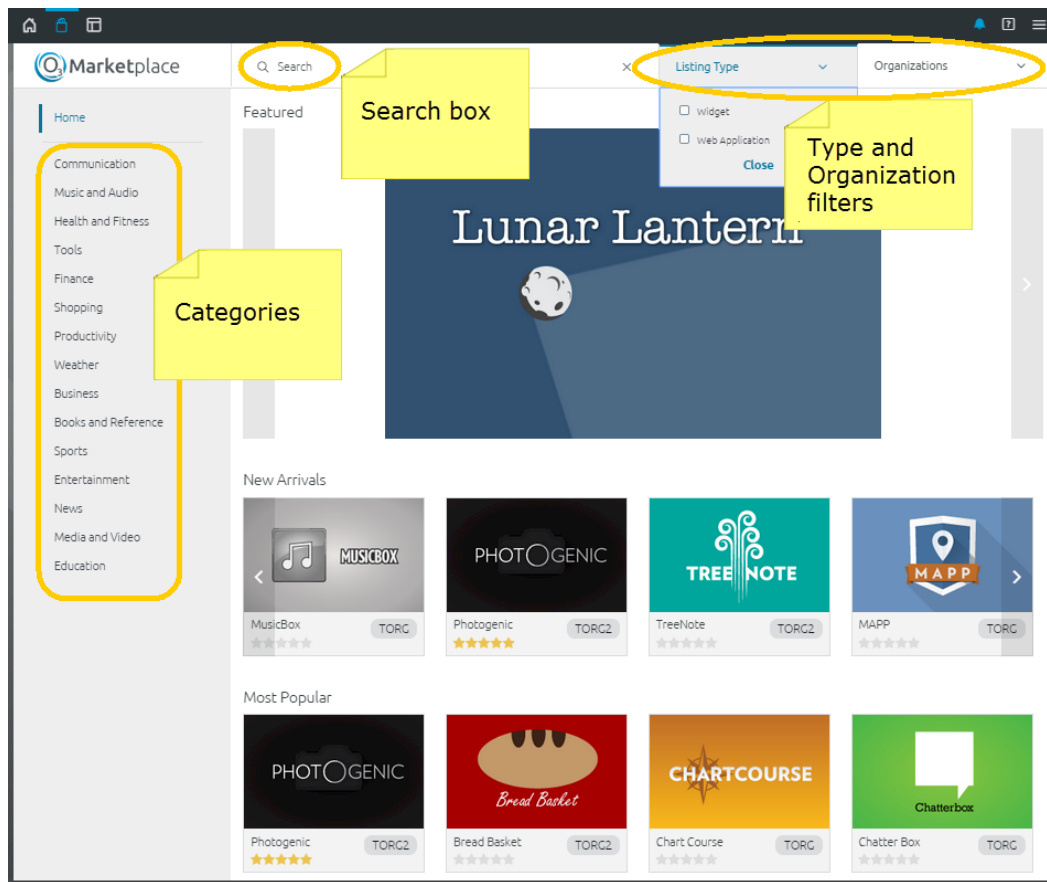


Figure 29: Searching Tools

- **Search box** – The search box is located at the top of the Search and Discovery Page. When you enter a search term, the system looks for your term in the listing name, description, tags, etc.
- **Categories** – Groupings of listings determined by the owner or stewards, a listing can be associated with multiple categories. Click a category on the left panel and only listings associated with that category will appear on the page. If you select multiple categories, only listings associated with all of the selected categories will appear.
- **Types** – Located at the upper-right side of the Search and Discovery Page, click the checkbox beside the Types you want to display. Only the listings of the selected Types will appear in the filtered list. Owners determine listing Type.
- **Organizations** – If you are a member of more than one organization, you can filter by organization using this field which is located on the upper-right side of the Search and Discovery Page.

5 Content Steward Guide

Content stewards are the gatekeepers. They oversee all listings in Marketplace. Before listings are available for users to find and use, an organizational content steward and a Marketplace content steward must approve them.

5.1 Define Content Steward Roles

- **Marketplace content steward** – People with this role have two main functions. They must approve every listing in Marketplace and administer the system and enable or disable them. Administering the system includes making new Categories, etc., and sending notifications.
- **Organizational content steward** – Every organization has at least one organizational content steward or “org steward.” The org steward must approve listings before sending them to a Marketplace steward for final approval. Org stewards can approve listings or send them back to their owners for updates. Also, they can edit or delete reviews.

5.2 Org Listing Page

Org stewards can see every listing in their organization from their Listing Management page. To access this page, click the drop-down Main Menu on the right side of the Global Toolbar and select Listing Management:

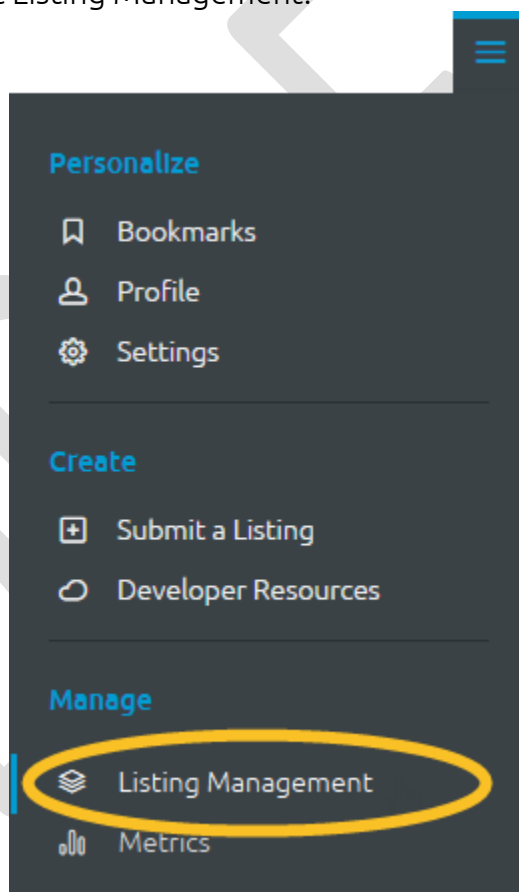


Figure 30: Listing Management

All users, including stewards, see My Listings when the Listing Management page opens. Only listings you own appear on the My Listings tab. To see all the listings you oversee as an org steward, click the Org Tab:

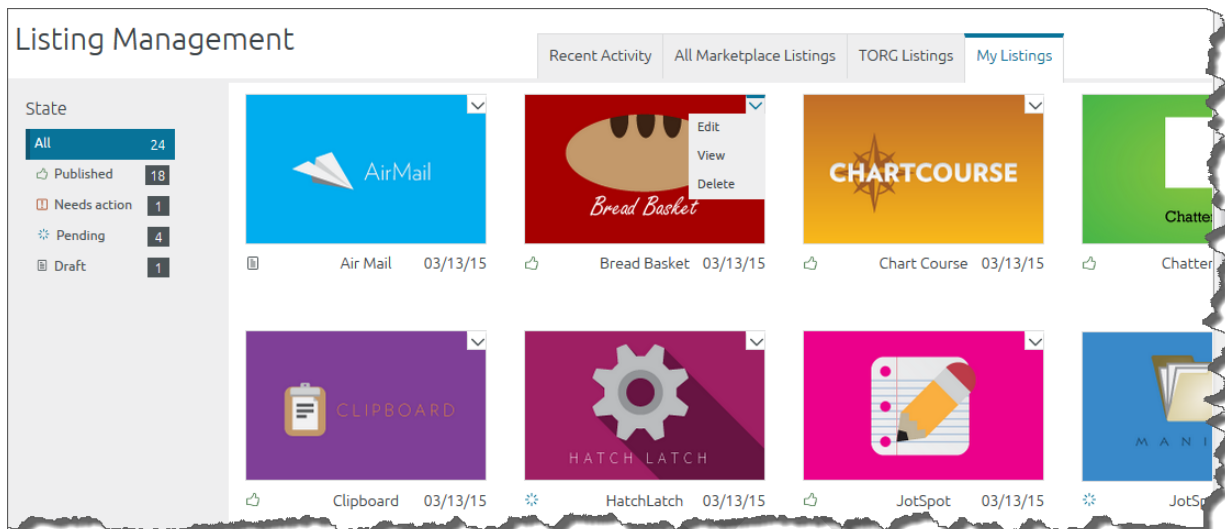


Figure 31: Listing Management Org Steward Tab

Marketplace stewards have an additional tab that lists all listings in the store. From the org steward or Marketplace steward tabs, you can Edit, View or Delete a listing. To Approve/Reject or Enable/Disable, see 5.3: Manage Listings.

5.3 Manage Listings

Before users can find and bookmark listings from Marketplace, an org steward and Marketplace steward must approve the listings as described in the following sections.

5.3.1 Org Steward Listing Approval Instructions

After a user submits a listing, the org steward must approve it, and then a Marketplace steward must approve it.

To approve a listing as an org steward:

1. Open the Needs action page. To do this, click the drop-down Main Menu and select Listing Management. Click Needs action from the State panel on the left:

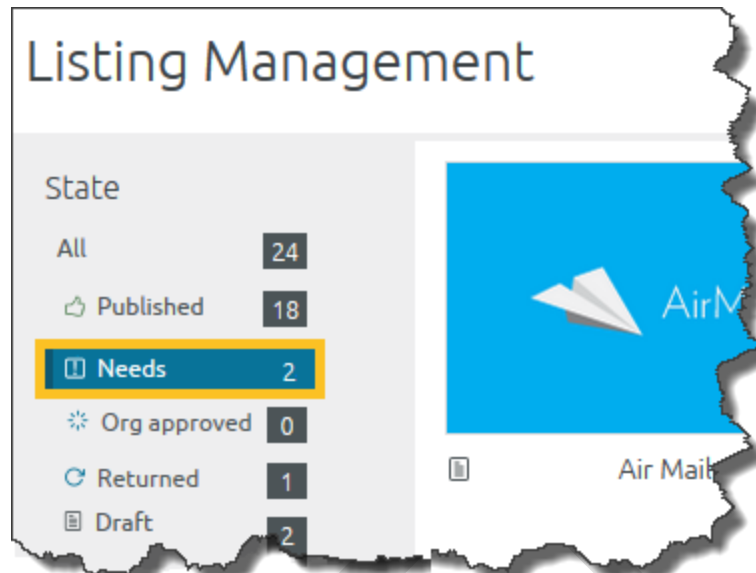


Figure 32: Needs Action link of Listing Management Page

2. Listings that need approval appear here. Click a listing to open its Detailed View.
3. After reviewing the listing, click the Administration tab.
4. On the left-side, click Approve or Return to Owner:

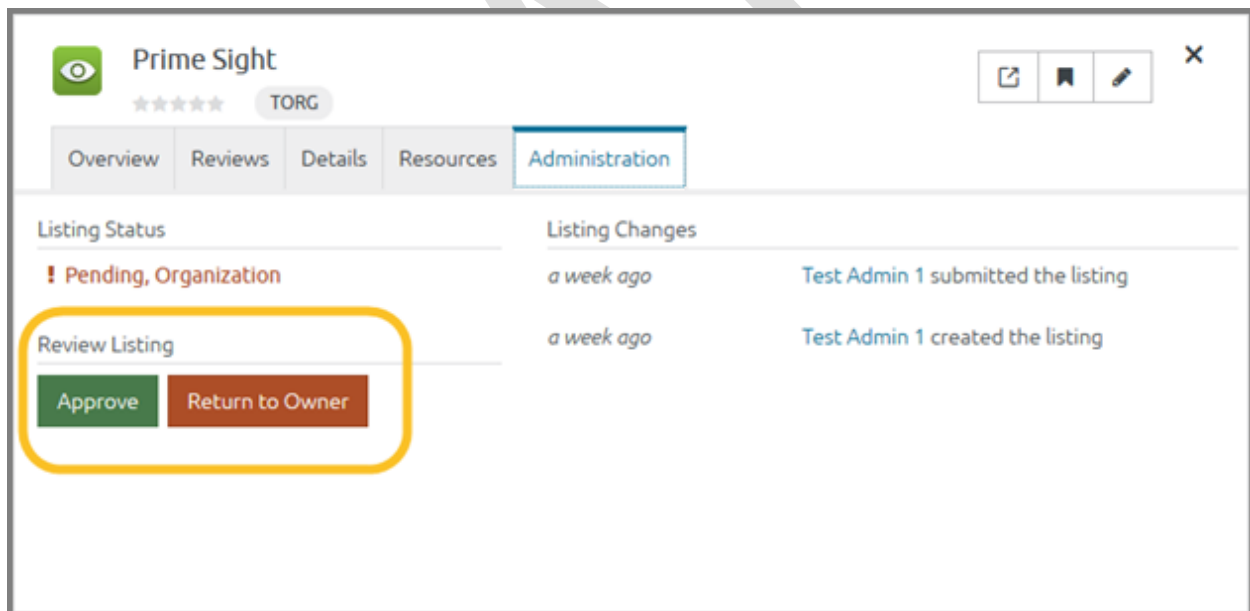


Figure 33: Administration tab on the Detailed Listing View

- a. If you approve the listing, it moves into the Marketplace steward's queue and you're done. After the Marketplace steward approves the listing, the owner or the Marketplace steward can enable or disable it.
- b. If you click Return to Owner, type instructions explaining how the user should update the listing before resubmitting it. Then, click Return to Owner. The listing will move out of your queue until the owner resubmits it.

5.3.2 Marketplace Steward Listing Approval Instructions

Marketplace stewards must approve all listings in the store. All Marketplace listings appear on a tab on a Marketplace Steward's Listing Management page:

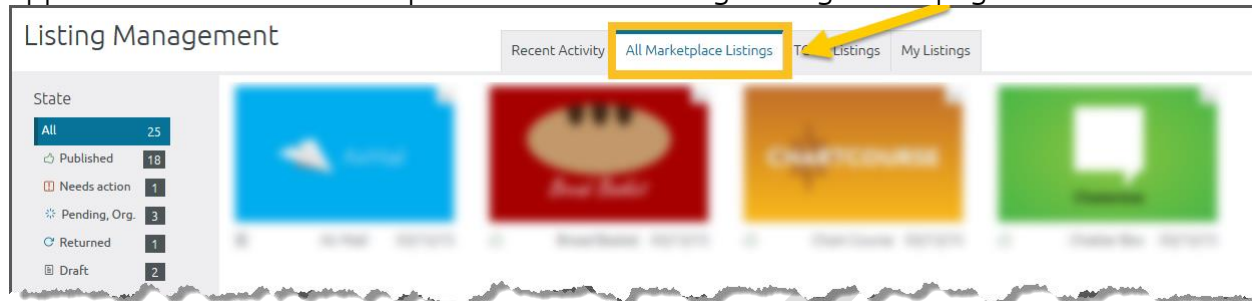


Figure 34: All Marketplace Listings tab

After an org steward approves a listing, the Marketplace steward must:

1. Open the Needs action page. To do this, click the drop-down Main Menu and select Listing Management. Click Needs action from the state panel on the left:

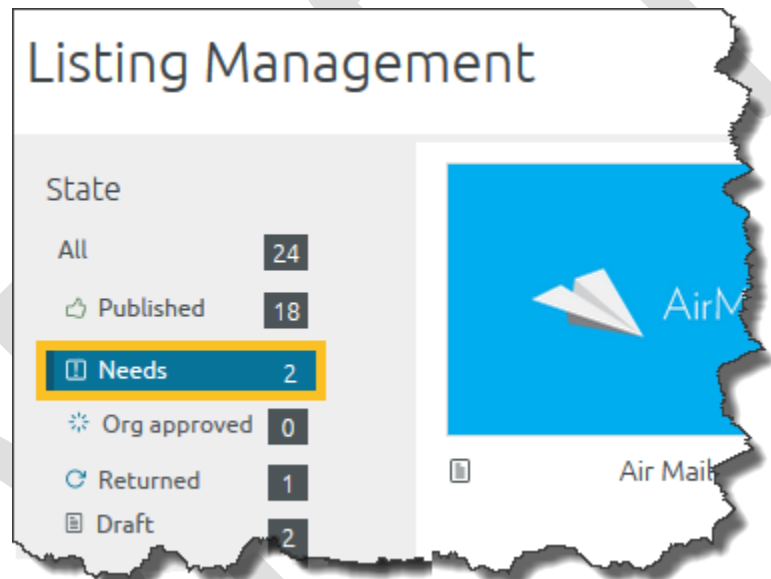


Figure 35: Needs Action link on Marketplace Steward's Listing Management Page

2. Listings that need approval appear on the Needs action page. Click a listing to open its Detailed View.
3. After reviewing the listing, click the Administration tab.
4. On the left-side, click the Approve or Return to Owner:
 - a. If you approve the listing, the listing is automatically Enabled and it will appear in search results and be available for download.
 - b. If you click Return to Owner, type instructions explaining how the user should update the listing before resubmitting it. Then, click Return to Owner. The listing will move out of your queue until it is resubmitted and approved by an org steward.
5. As a Marketplace steward, you have to make two more decisions:
 - a. **Enabled** – Makes the listing visible to all users, i.e., it appear on the Search and Discovery Page and is searchable.

- b. **Featured** – Activating the Featured button adds the listing to the group of Featured Listings that scroll across the top of the Search and Discovery Page see 5.3.3: Feature Flag.

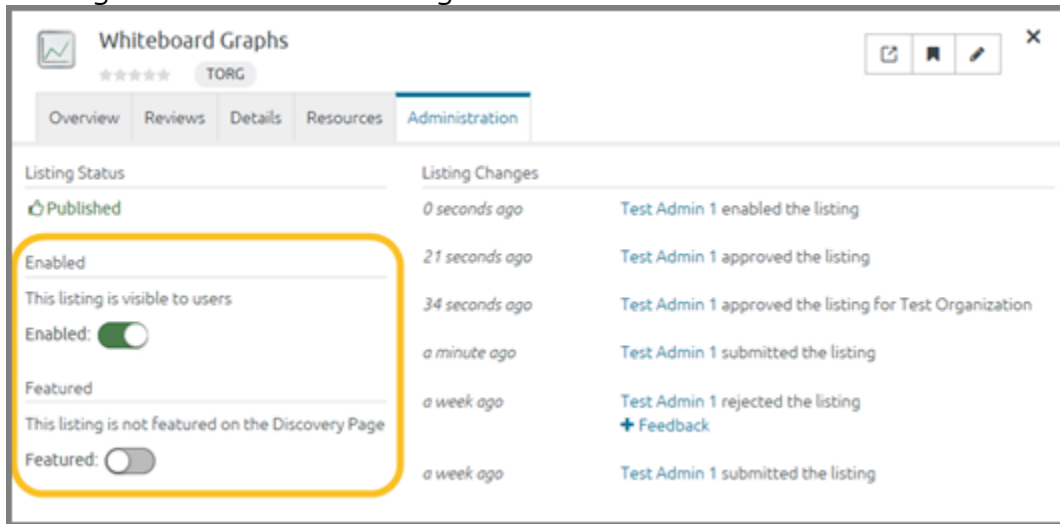


Figure 36: Administrative controls on a listing's Detailed View

5.3.3 Feature Flag

Marketplace stewards control the Featured Listings on the Search and Discovery Page. To add a listing to the group of Featured Listings:

1. Open a listing's Detailed View by clicking the listing icon.
2. Click the Administration tab.
3. Click the Featured control to activate it:

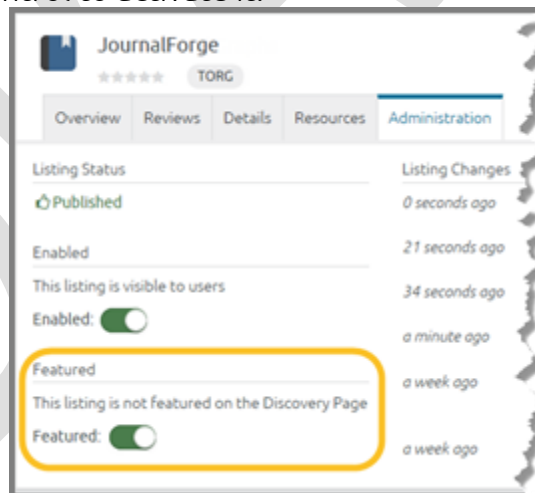


Figure 37: Activated Featured Flag

4. When the Featured control is activated, the listing appears in the Featured section of the Search and Discovery Page:

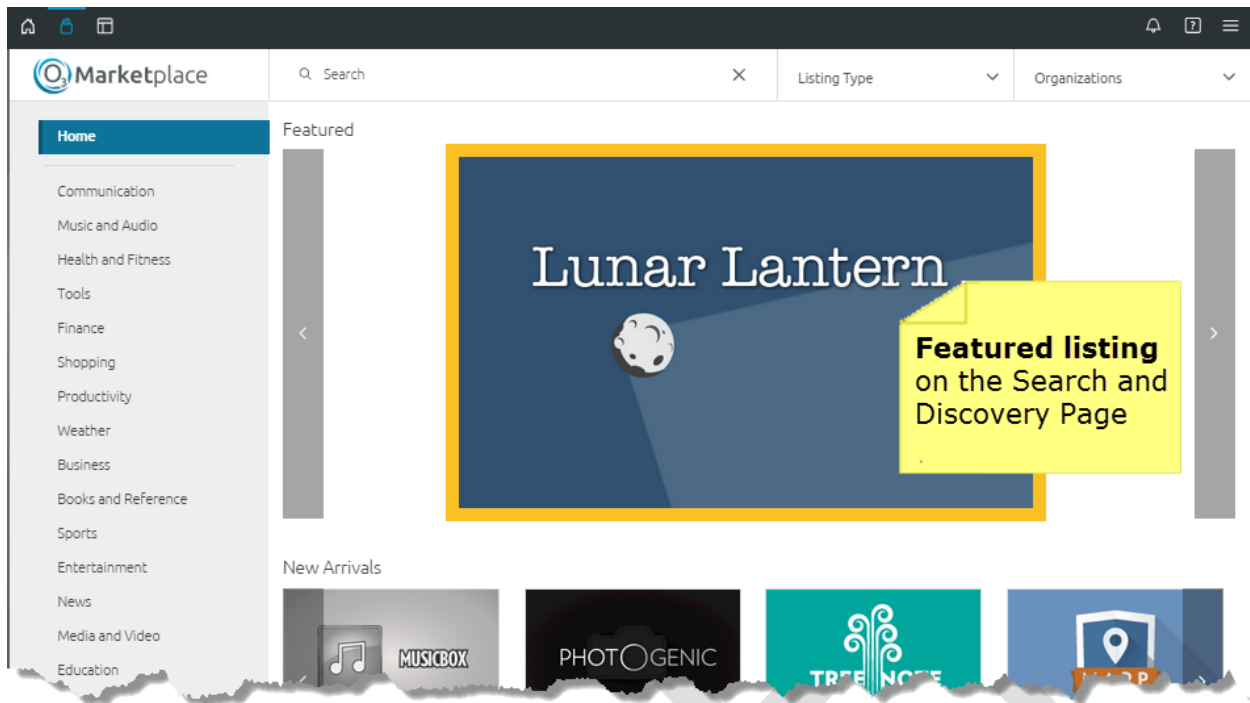


Figure 38: Featured Listing on the Search and Discovery Page

5.4 Marketplace Manager


The Marketplace Content Steward has two roles:

1. **Oversee *all* listings in Marketplace** see 5.3: Manage Listings
 - a. Approve or reject listings
 - b. Enable or disable listings
 - c. Select which listings will be featured on the Search and Discovery Page
2. **Configure and administer Marketplace** (explained in section 5.5)
 - a. Add, edit and delete Marketplace Settings including Categories, Contact Types, Intents, Organizations and Stewards
 - b. Send system-wide Notifications

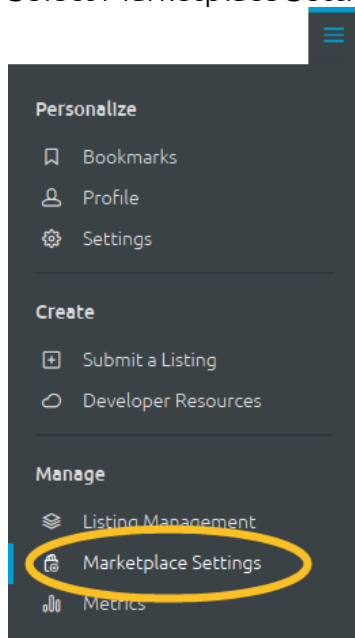
5.5 Marketplace Settings

The Marketplace steward manages configurable aspects of the store. He or she adds, modifies and deletes new fields on the Listing Create/Edit Form; monitors organizational stewards and sends system-wide notifications. This section explains how to add, edit and delete fields on the Listing Create/Edit Form.

To access the Marketplace Settings window:

1. Click  on the right-side of the Global Toolbar.

2. Select Marketplace Settings:



3. The Marketplace Settings page will open to the Categories tab:

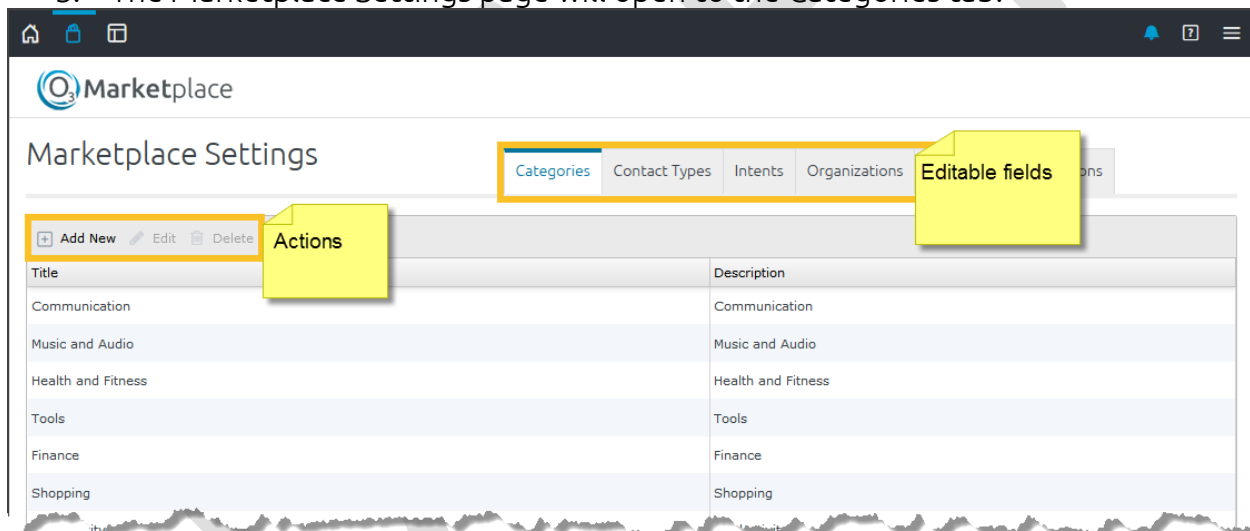


Figure 39: Marketplace Settings

5.5.1 Marketplace Settings: Add/Edit/Delete

5.5.1.1 Categories

Categories can group listings by similar characteristics. They help people narrow their search results on the Search and Discovery Page:

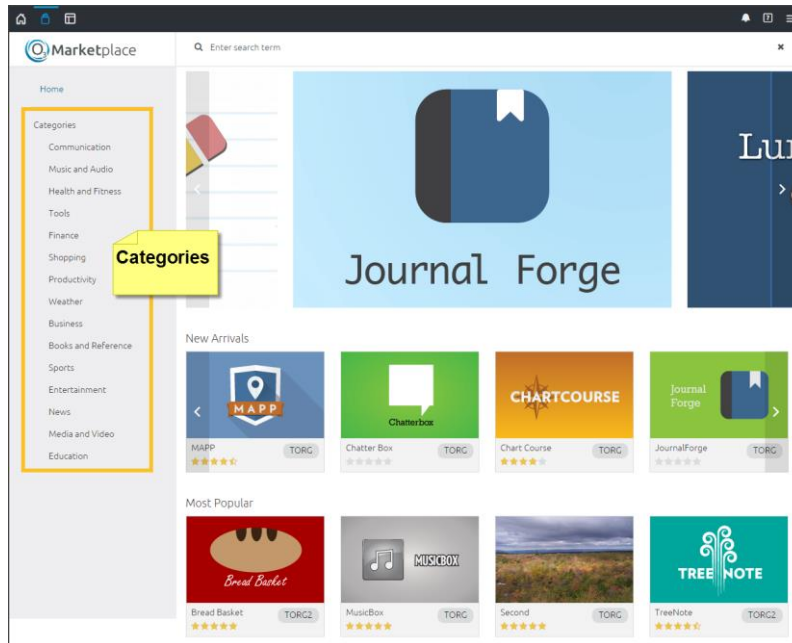
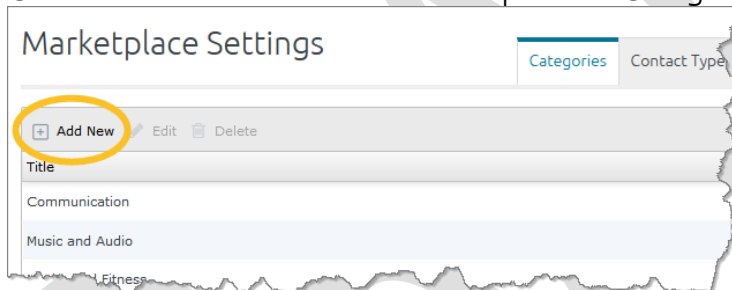


Figure 40: Categories location on the Search and Discovery Page

To **create** a category:

1. Click the Add New button at the top of the Categories table:



2. The Create Category window opens. Give the category a Title and Description, and then click Save.
3. The category will appear on the list of categories on the Marketplace Settings page and on the Search and Discovery Page.

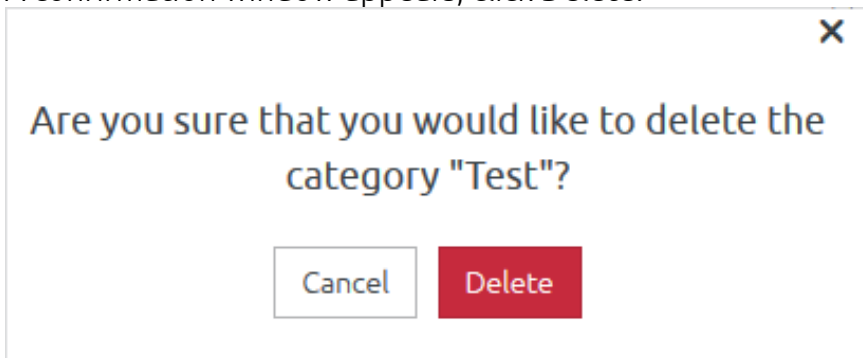
To **edit** a category:

1. From the Categories tab on the Marketplace Settings page, click the category that you want to edit.
2. The Edit button will become active, click it.
3. The Edit Category window will open, make your change and click Save.
4. The change will appear on the list of categories on the Marketplace Settings page and on the Search and Discovery Page.

To **delete** a category:

1. From the Categories tab on the Marketplace Settings page, click the category that you want to delete.
2. The Delete button will become active, click it.

3. A confirmation window appears, click Delete:



4. The category will be removed from the list of categories on the Marketplace Settings page and on the Search and Discovery Page.
However, if the category is associated with a listing, it cannot be deleted. To delete the category you have to remove its association with all listings. Edit each listing using the Create/Edit Form.

5.5.1.2 Contact Types

Contact Types identify designated contact people. The information appears on the Resources tab of the listing's Detailed View:

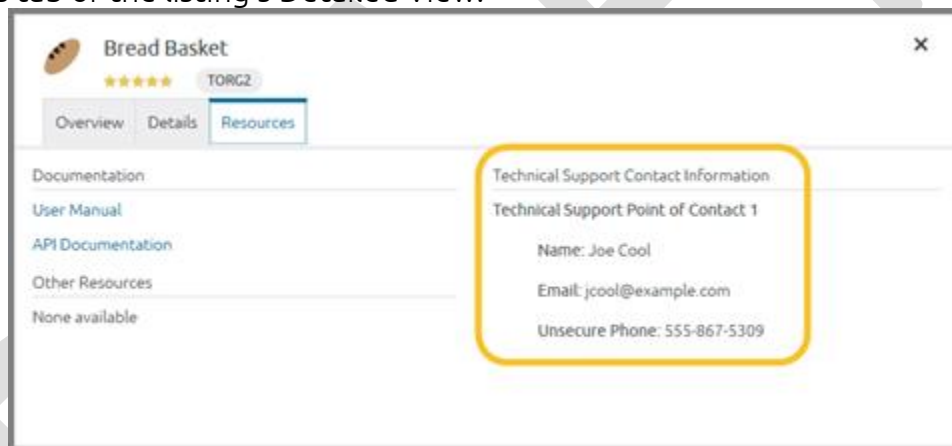
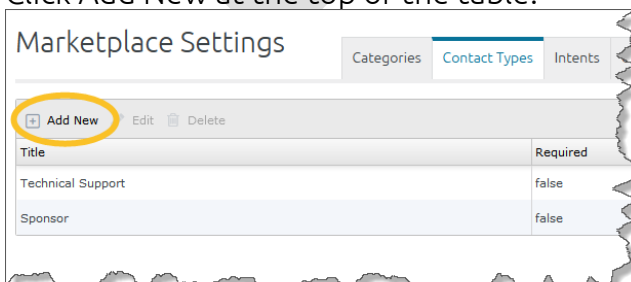


Figure 41: Contact information on the listing's Detailed View

To **create** a Contact Type:

1. Click the Contact Types tab on the Marketplace Settings page.
2. Click Add New at the top of the table:



3. The Create Contact Type window opens. Give the contact type a Title and check Required if the field is required for listing submission.

4. Click Save.
 - The contact type will appear on the list of contact types on the Marketplace Settings page.
 - It will be a drop-down choice on the Contacts section of the Listing Create/Edit Form.
 - If the contact type is required, it must be populated when anyone edits an existing listing.

To **edit** a contact type:

1. From the Contact Types tab on the Marketplace Settings page, click the contact type that you want to edit.
2. The Edit button will become active, click it.
3. The Edit Contact Type window will open, make your change and click Save.
4. The change will appear on the list of contact types on the Marketplace Settings page and on the Listing Create/Edit Form.

To **delete** a contact type:

1. From the Contact Types tab on the Marketplace Settings page, click the contact type that you want to delete.
2. The Delete button will become active, click it.
3. A confirmation window appears, click Delete.
4. The contact type will be removed from the list of contact types on the Marketplace Settings page and on the Listing Create/Edit Form.

5.5.1.3 Intents

Intents are the instructions for carrying out a listing's intentions. Intents comprise an Action (graph, view, edit, etc.), a Data Type (HTML, text, image, etc.) and a Send/Receive request. You can associate this action or data type with an icon. However, this information is only metadata used as a placeholder. **For any intent to function, a developer has to code the actual function into the listing.**

From the Intents tab on the Marketplace Settings page, you can create an intent placeholder that will appear on the Listing Create/Edit Form.

To **create** an Intent placeholder:

1. Click the Intent tab on the Marketplace Settings page.
2. Click Add New at the top of the table.
3. The Create Intent window opens. Populate the following fields:
 - a. **Label** – Explain what the intent does. This label will appear in the drop-down list when a user chooses an intent on the Listing Create/Edit Form.
 - b. **Action** – Describe the intent in 64 characters.
 - c. **Type** – Describe the intent in 64 characters.
Ex: application/json, application/custom-type, etc.
 - d. **Icon** – Attach an image that will appear when anyone uses the intent.
Think of this like the icon that appears on a smart phone when you decide to open an address and the system prompts you to open that address in a browser or a mapping app.
4. Click Save.

- a. The intent will appear on the list of intents on the Marketplace Settings page.
- b. It will be a drop-down choice in the Intents section of the Listing Create/Edit Form.

To **edit** an intent Label or Icon:

1. From the Intents tab on the Marketplace Settings page, click the intent that you want to edit.
2. The Edit button will become active, click it.
3. The Edit Intent window will open, make your change and click Save.

Note: You cannot edit the intent Action and Type after it is created.

The change will appear on the list of Intents on the Marketplace Settings page and on the Listing Create/Edit Form.

To **delete** an Intent:

1. From the Intents tab on the Marketplace Settings page, click the Intent that you want to delete.
2. The Delete button will become active, click it.
3. A confirmation window appears, click Delete.

The intent will be removed from the list of intents on the Marketplace Settings page and on the Listing Create/Edit Form.

5.5.1.4 Organizations

Marketplace can filter listings by organizations.

To **create** an organization:

1. Click the Organizations tab on the Marketplace Settings page.
2. Click Add New at the top of the table.
3. The Create Organization window opens. Enter a Title and Acronym or Abbreviation that will appear on the listing's Short View and Detailed View.
4. Click Save. After refreshing, the organization will appear as an option in the Stewards drop-down. See the next section "Stewards" to learn how to associate a steward with the new organization.

To **edit** an organization:

1. From the organization tab on the Marketplace Settings page, click the organization that you want to edit.
2. The Edit button will become active, click it.
3. The Edit Organization window will open, make your change and click Save.
4. The change will appear on the list of Organizations on the Marketplace Settings page.

To **delete** an organization:

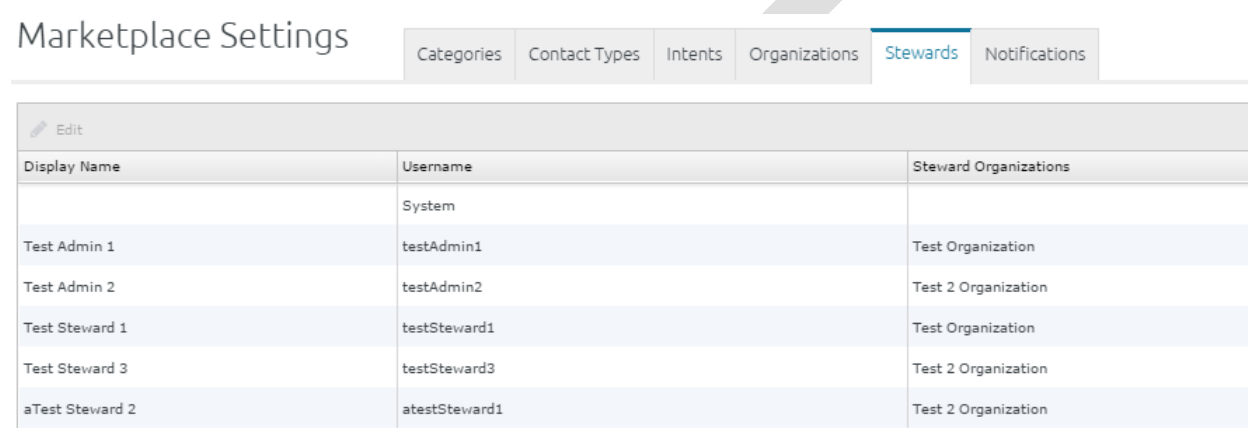
1. From the organizations tab on the Marketplace Settings page, click the organization that you want to delete.
2. The Delete button will become active at the top of the table, click it.
3. A confirmation window appears, click Delete.

The organization will be removed from the list of organizations on the Marketplace Settings page and on the Listing Create/Edit Form.

*Note: An organization **cannot** be removed if it is associated with a listing.*

5.5.1.5 Stewards

Stewards oversee listings in Marketplace. They are the gatekeepers that approve, enable and moderate listings. There are two kinds of stewards: **Org Stewards** who oversee specific organizations and **Marketplace Stewards** who oversee all listings and specific settings in the store. At log-in, your system will determine your role as a user, org steward or Marketplace steward. When someone signs in as a steward, their name is added to the list of Stewards in the Marketplace Settings page:



Marketplace Settings		
Categories Contact Types Intents Organizations Stewards Notifications		
Edit		
Display Name	Username	Steward Organizations
	System	
Test Admin 1	testAdmin1	Test Organization
Test Admin 2	testAdmin2	Test 2 Organization
Test Steward 1	testSteward1	Test Organization
Test Steward 3	testSteward3	Test 2 Organization
aTest Steward 2	atTestSteward1	Test 2 Organization

Figure 42: Steward Management in the Marketplace Settings Menu

Marketplace stewards cannot add or delete stewards listed on the Stewards tab. However, they can edit the organizations assigned to each steward.

To **edit** a steward's assigned organization(s):

1. From the Stewards tab on the Marketplace Settings page, click the Display Name that you want to edit.
2. The Edit button in the table header will become active, click it.
3. The Edit Steward window will open:
 - a. To remove an organization, click Remove beside the Stewarded organizations drop-down field.
 - b. To add an organization, click Add and select the new organization from the drop-down list.
4. Click Save, the change will appear on the list of Stewards on the Marketplace Settings page.

5.5.1.6 Notifications

Only Marketplace Stewards can alert all system users via the Notifications feature.

This section explains how to send and delete notifications:

1. From the Marketplace Settings page, click the Notifications tab.
2. Schedule and write the notification:

- a. In the Expires At field, enter the date when you want the Notification message to disappear from users' drop-down notifications list on their Global Toolbars.

By default, you enter the Expires At time in Zulu Time. It appears as the local time zone time on each person's Notifications tab.

- b. Write the notification:

Figure 43: System Notification Form

3. Click Send, the Notification will appear two places in the system:

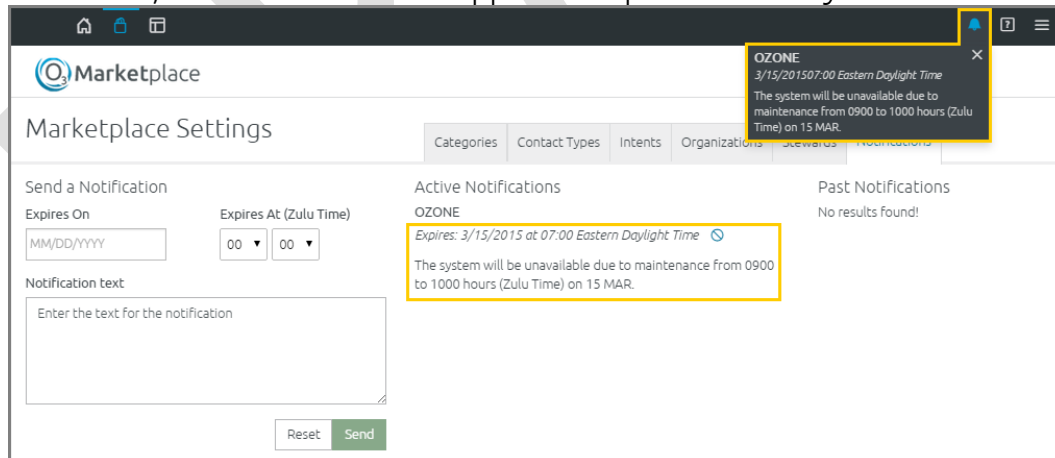


Figure 44: Notification Locations

- a. The list of Active Notifications on the right-side of the screen (all Marketplace Stewards will see it there).
- b. Under the Notifications icon on the Global Toolbar (all users will see it there). Users can click the X in the upper-right corner of the notification to dismiss the notification or wait for the notification to expire, at which point it will be removed from their list.

5.5.1.6.1 Cancel a Notification

Any Marketplace Steward can cancel a notification:

1. From the Notifications tab on the Marketplace Settings window, click the remove icon beside the Active Notification

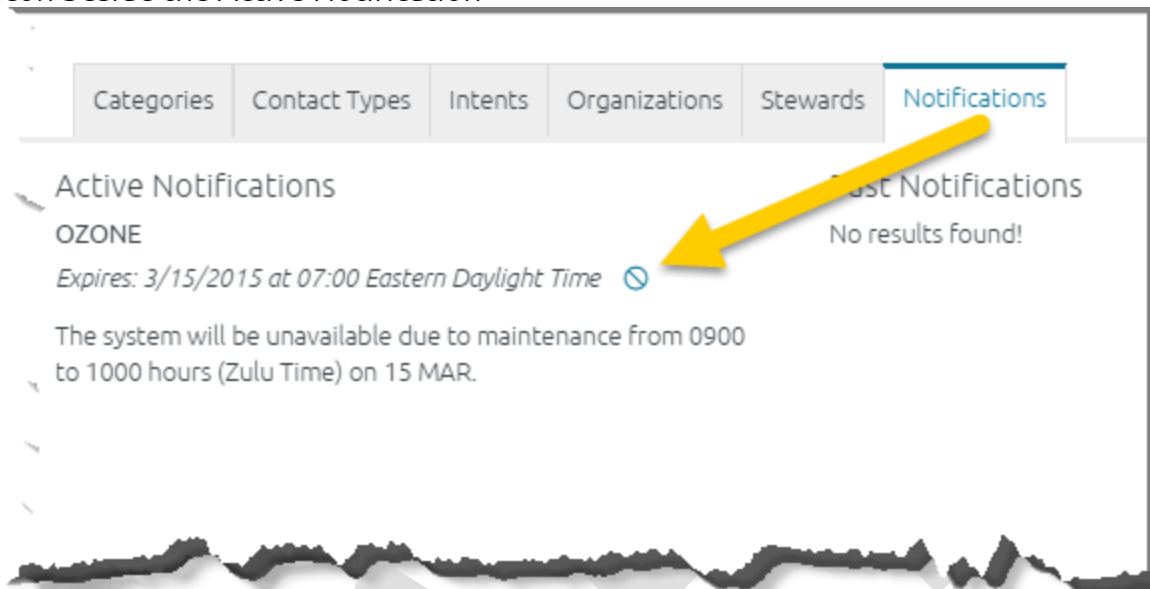


Figure 45: Remove Icon on Active Notification

The notification will be removed without a confirmation message. It will be removed from users' Global Toolbars when they refresh their page.